

# EMPLOYEE CAMPAIGN MANAGER ROADMAP

Utilize this roadmap to customize a timeline for your UWYC giving campaign

United Way of  
Yavapai County



Company Name:

Campaign Dates:

## GETTING STARTED

- ☐ Meet with your UWYC representative to discuss campaign strategy that is customized for your company
- ☐ Meet with CEO and leadership to discuss campaign goals, offer incentives to donors, confirm corporate gift or match, and secure participation in campaign
- ☐ Organize committee to plan and coordinate with key department leads
- ☐ Set goals, timelines, communication plan, engagement activities, special events, volunteer opportunities and other measures of success

## PLANNING AHEAD

- ☐ Develop strategies for incentives for donors, leadership giving, affinity group participation
- ☐ Create a timeline for presentations and activities during campaign
- ☐ Plan special events and fundraisers
- ☐ Determine and distribute necessary (downloading virtual) materials from VSUW
- ☐ Send communication from management to employees to set awareness
- ☐ Publicize campaign

## KICK OFF

- ☐ Confirm Leadership attendance and ask them to share personal anecdote
- ☐ Invite Staff and collect RSVP's - Send reminder and update speakers if necessary
- ☐ Host campaign kickoff event to officially start your United Way Giving Campaign
- ☐ Consider including volunteer engagement activity
- ☐ Distribute pledge information to employees and share about goals, timeline, special events, education options and incentives
- ☐ **Make the ask!**

## DURATION

- ☐ Send communications throughout the campaign to keep enthusiasm high. Use all channels to best share about impact.
- ☐ Provide employees the opportunity to learn more about UWYC by hosting volunteer engagement activities, speakers series
- ☐ Provide employees opportunities to make a financial contribution to UWYC by hosting presentation and special events
- ☐ Engage internal affinity groups through events and presentations

## WRAP UP

- ☐ Send final reminders to encourage participation
- ☐ Collect pledge information and special event contributions
- ☐ submit final reports to payroll/human resource department and complete wrap up procedures based on giving processor
- ☐ Thank employees for participation with celebration event or communication
- ☐ Announce final campaign results to employees
- ☐ Thank campaign committee leadership team, internal groups, other departments for successful UWYC giving campaign
- ☐ Coordinate time with UWYC representatives to pick up supplies, pledges, special event donations and debrief about campaign successes, challenges and next steps
- ☐ Celebrate!

## ON GOING

- ☐ Coordinate volunteer engagement options throughout the year

Find resources, messaging, materials, and more to support your United Way of Yavapai County campaign at:

<https://www.yavapaiuw.org> | [Director@yavapaiuw.org](mailto:Director@yavapaiuw.org) | (928) 778-6605