Utilize this roadmap to customize a timeline for your United Way giving Campaign

Company name: [ ] Campaign Dates: [ ]

Getting Started

☐ Meet with your UWNA 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
☐ Confirm technical requirements and security for virtual options with IT and leadership
☐ Organize and coordinate with key department leads
☐ Attend a Campaign Coordinator Training
☐ Visit www.nazunitedway.org for all campaign items

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
☐ Send communication from management to employees to set awareness
☐ Publicize campaign
☐ Test Technical requirements

Kick Off

☐ Invite staff and collect RSVPs – send reminder and update speakers if necessary
☐ Host campaign kickoff events to officially start your United Way Giving Campaign
☐ Confirm leadership attendance and ask them to share personal anecdote
☐ Consider including 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 United Way by hosting volunteer engagement activities, speaker’s series and open conversations
☐ Provide employees opportunities to make a financial contribution to United Way by hosting presentations 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
☐ 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 helping make the campaign a success
☐ Coordinate time with United Way representative to pick-up left-over supplies, pledges, special event donations and debrief about campaign successes, challenges and next steps
☐ Celebrate!

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

www.nazunitedway.org/getinvolved