



United Way Workplace Campaign & Year-Round Engagement Checklist

Below is a checklist for companies that run a two-week long United Way Campaign.



Your United Way engagement manager will work with you to ensure an engaging United Way experience for your company that meets employee engagement and corporate social responsibility goals.

Two months prior to campaign kickoff

- Meet with United Way engagement manager** – Review last year’s United Way efforts and create plans for this year
- Map out goals** – Participation (include retiree engagement), fundraising, corporate social responsibility priorities and United Way community recognition
- Determine campaign theme** – Generate ideas for United Way kickoff and special events
- Plan internal workplace communications** – Use United Way workplace toolkit
- ePledge set-up/paper pledge** – Four to six weeks prior to kickoff date

One and a half months prior to campaign kickoff

- Finalize ePledge** – Send information for your company’s ePledge site to your engagement manager
- Plan employee community engagement opportunities** – Utilize the Choose Your Own Experience online platform to determine best ways to engage employees (i.e. kit builds, agency tours, volunteering, poverty simulations, etc.). Allow at least four to six weeks of planning time

One month prior to campaign kickoff

- Leadership development and Affinity Group engagement** – Host a lunch and learn or invite your Employee Resource Groups to learn and participate
- Leverage internal champions** – Drum up excitement and send a campaign reminder

One week prior to campaign kickoff

- Review ePledge site with your engagement manager**
- Finalize and discuss any materials needed**

During Campaign

- Host United Way campaign kickoff**, special events and community engagement opportunities
- Show Appreciation** – Utilize United Way’s “Gratitude in a Box” to show appreciation to employees who give to the campaign or hold thank you event for donors
- Invite new hires to participate** – Use new hire letter template to encourage new employees to get involved

Post Campaign

- Meet with your engagement manager** – Post-campaign wrap-up and discuss next steps for engagement
- Map out year-round engagement** – Use workplace toolkit calendar and review best practices in community engagement at uwci.org/toolkit
- Leverage United Way as a partner to help you reach your year-round goals in:**
 - Corporate Social Responsibility Initiatives
 - Diversity and Inclusion Initiatives – Check out Community Conversations events!
 - Retiree Engagement
 - Community Leadership and Professional Development – Check out Leadership United and affinity groups