

E-PLEDGE YOUR WORKPLACE CAMPAIGN CHECKLIST

THANK YOU FOR YOUR SUPPORT OF UNITED WAY OF GREATER PHILADELPHIA AND SOUTHERN NEW JERSEY!

To make your efforts as a campaign volunteer as easy and enjoyable as possible, we have assembled this checklist to guide you through the process. A successful campaign will always be tailored to the interests and priorities of a given workplace, but building from this starting point will give you a strong foundation.

BEFORE THE CAMPAIGN

- ☐ Attend United Way Ambassador Training & Forum
- ☐ Secure CEO/senior management support and suggest organizational incentives
 - ☐ Determine your campaign dates, dollar and/or participation goals, and incentives
- ☐ Recruit a team to help with the campaign (e.g., someone from payroll, marketing, etc.)
- ☐ Meet with your United Way Representative to discuss campaign details & strategy
- ☐ Set up your e-Pledge portal for the year
 - ☐ Share your updated employee data with the e-Pledge team 4-6 weeks before kickoff
 - ☐ Provide text for campaign emails
- ☐ Promote the campaign and distribute your calendar of events
 - ☐ Send all-staff calendar appointments

DURING THE CAMPAIGN

- ☐ Hold kickoff event with United Way Rep and Impact speaker
- ☐ Hold a Leadership Giving or Loyal Contributor event
- ☐ Conduct special events, Lunch-and-Learn sessions, or other activities
- ☐ Keep the campaign alive by sharing success stories, toolkit materials, and event photos via your intranet and social media channels
- ☐ Check with UW Rep about any needs that emerge, progress to goal, and best practices
- ☐ Follow up with outstanding past donors and prospects

AFTER THE CAMPAIGN

- ☐ Follow up on any corporate contribution or employee match
- ☐ Ensure e-Pledge payroll file is shared with your internal payroll team
 - ☐ Confirm total with UW Rep and share results with all employees
- ☐ Post campaign photos to your corporate social media networks
- ☐ Thank all donors with a celebration event, letter, or email from your CEO
- ☐ Debrief with your UW Rep about the campaign, lessons learned, and plans for next year

QUESTIONS?

Not sure if your campaign uses ePledge or eZpledge? Please email Kari Sullivan at ksullivan@unitedforimpact.org.