

Running a successful Employee Campaign requires diligent planning and the coordinated efforts of a strong, committed Campaign Team. Use the following checklist as a guide for planning and implementation.

## Review Last Year's Campaign

Speak with past Employee Campaign Committee Chairs and members. Review previous strategies/tactics, timelines, and results. Ask about what worked and what could be improved.

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## Meet with your United Way Representative

They will guide you through the next steps and support you throughout your campaign. Plan early to review last year's campaign, strategize for the upcoming campaign, and learn about new tools and materials. Call us at **204-571-8929** to be connected with your appointed representative.

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## Recruit your Campaign Team

Having a campaign team will allow for different ideas, shared workload, and a great team building opportunity. Ideally, a campaign committee is comprised of members from all departments, levels, and locations of your organization and union(s), if applicable.

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## Invite Senior Management Support

The support of senior management in your organization is critical to the success of your campaign. Ask your CEO to assist and support the campaign by:

- Approving the employee time necessary to plan, implement, and participate in campaign activities.
  - Appointing a senior management liaison to your committee.
  - Sending a personalized message to each employee endorsing your campaign.
  - Attending and speaking at campaign events.
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## Set your Goals and Initiatives

Be brave as well as realistic when setting your goals for the year. Plan for 100% of your team to be involved, informed, inspired, approached, followed up with, and thanked!



# Campaign Planning Checklist



**United Way**  
Brandon & District



## Publicize the Campaign

Communicate campaign information and events to all employees through United Way marketing materials, emails, calendar of events, posters, and more!

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## Kickoff the Campaign!

Inspire your colleagues to get on board. Plan a kickoff event that aligns with your workplace culture. Some ideas include: lunch and learn presentations, community partner tours, and office-wide events.

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## Announce Results and Show Appreciation

Plan ways to finalize the campaign, celebrate accomplishments and thank employees for their participation and contributions. Saying “thank you” not only shows appreciation, but also sets the tone for year-round communication and next year’s campaign. People will have a more positive feeling about their donation, and increases the likeliness that they’ll participate next year.

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## Final Report and Processed Pledge Forms

- Record all pledges on the tracking sheet provided in the campaign envelope, to ensure all cash/cheque donations receive a tax receipt for their donations.
  - Return all forms to the United Way representative for processing after a copy has been sent to your payroll department.
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## Wrap Up and Celebrate Impact!

You announced your goal to your colleagues at the start, and now it’s time to tell them what you accomplished. Host a wrap-up event or announce it at an all-staff meeting so that everyone can share in the success of the campaign.