

Workplace Campaign Planning Matrix

UNITED in PURPOSE

TASK	Target Date	Date Completed	Initials of Task Owner	Notes
Attend Employee Campaign Manager Training				campaign@msaunited.org
If applicable, meet with previous Employee Campaign Manager				
Meet with CEO -obtain CEO endorsement and support				
Recruit Campaign Committee				
CEO Endorsement draft letter				
Contact UW to request a speaker to do an employee presentation				campaign@msaunited.org
Secure a corporate gift or corporate match commitment				
Develop Campaign Plan - Determine Campaign Timeline - Set Campaign Goal				https://www.msaunitedway.org/campaign
Choose Marketing Strategy - Set incentives - Plan special events				
Ask United Way Resource Director for the mail electronic pledge link for your team				If you need paper pledge forms this would be the time to contact UW for the forms.
Let United Way know what support you will need				
Request Management to make appearances at kick-off and presentations				
Schedule Campaign Q& A to ensure everyone is personally asked to give				
Send out CEO endorsed email				
Send email out about upcoming week and special event info - Draft emails are available on our Campaign toolkit website. See notes.				https://www.msaunitedway.org/campaign-toolkit
Week of Campaign -Special Event - UW Presentation - E-Mail electronic pledge link - Hand out paper pledge forms				UW has draft emails available at https://www.msaunitedway.org/campaign
Send email on UW donation stats for the goal - Special event donation results - Update on the events that have happened this week				Will employees let you interview them as to why they donate, volunteer or advocate for United Way? Share their story! Inspire your team!
Email with last reminder to pledge by today and announce the current total				
Wrap up week - Announce Campaign total and incentive winners. - If you have paper pledge forms, prepare to hand in. - Send thank you to donors, Campaign Committee, CEO and Management - Report results to MSA UW & analyze campaign with Committee.				United Way can provide sample thank yous for donors, campaign committee, CEO and Management
Report results to MSA UW				
Analyze Campaign with Committee				
MSA United Way THANKS YOU! Take the time to reflect on how your actions as an Employee Campaign manager will have a positive effect on your community. By mobilizing the caring power of your team, you have improved the lives of men, women and children in your community. Thank you for being a game-changer, on behalf of MSA United Way.				