

# UNITED is the WAY

## RUNNING A WORKPLACE INVESTMENT CAMPAIGN

- United is the Way to foster strong schools and thriving communities
- United is the Way to build wellness, hope, and resilience together
- United is the Way to ensure support and services are within reach

You and your team lead your organization's United Way investment campaign – joining local companies across the Valley in directing capital where it is needed most. Your donations stay local. Your community decides where they go.

### WHAT YOU NEED TO KNOW

#### WHO

You (the campaign coordinator) and your team lead your organization's investment campaign, joining hundreds of Valley employers in supporting our community.

#### WHAT

A workplace investment campaign is a time for your team to come together, have fun, and do real good. Campaigns run 1-2 weeks and can be virtual, in-person, or both.

#### WHERE

Your campaign takes place at your workplace – remote or in-person. Employees give through payroll deduction or the online portal. Every dollar stays in the Valley.

#### WHEN

UWNSV partners with companies year-round. Contact your rep to find the timing that works best for your organization and team.

#### WHY

40% of Valley households are below the ALICE threshold. When your employees give, their investment combines with thousands of others to directly fund crucial community programs.

#### HOW

UWNSV trains and facilitates the process. Your rep will walk you through every step, provide materials, and support your team from kickoff through impact reporting.

### YOUR COMPANY CAN CHOOSE WHERE TO INVEST

#### NAMED INVESTMENT AREAS – NEW FOR 2026

As a corporate partner, your company can choose to direct your investment toward one or more of the four community portfolio areas below. UWNSV will align your company's investment campaign to your chosen focus and report outcomes specific to that area. You can also choose to invest across all four areas – letting the community investment team direct capital where the data shows it is needed most.

#### Healthy community

Healthcare access, mental health, wellness, and coordinated care for Valley families

#### Youth opportunity

Kindergarten readiness, tutoring, mentorship, and workforce pathways for young people

#### Financial security

Eviction prevention, emergency assistance, and access to opportunity for ALICE families

#### Community resiliency

Basic needs, shelter, food access, and systems that stabilize families in crisis



**UNITED WAY**

Northern Shenandoah Valley

[unitedwaynsv.org](http://unitedwaynsv.org) | 540.536.1610 | [impact@unitedwaynsv.com](mailto:impact@unitedwaynsv.com)

Serving Winchester, Frederick, Clarke, Warren, Shenandoah, and Page Counties since 1946

EIN 54-0525106

# WORKPLACE CAMPAIGN CHECKLISTS

Use these checklists to stay on track before, during, after, and throughout the year. Check off each item as you complete it and record your target dates to keep your campaign on schedule.

BEFORE THE CAMPAIGN	DURING THE CAMPAIGN	AFTER THE CAMPAIGN	THROUGHOUT THE YEAR
<ul style="list-style-type: none"> <li><input type="checkbox"/> Schedule a UWNSV call or Teams meeting for program overview</li> <li><input type="checkbox"/> Attend UWNSV coordinator training</li> <li><input type="checkbox"/> Secure CEO / senior leadership support</li> <li><input type="checkbox"/> Set participation goal, monetary goal, and incentives</li> <li><input type="checkbox"/> Recruit a team and assign tasks by department</li> <li><input type="checkbox"/> Meet with your UWNSV rep to develop a calendar of events</li> <li><input type="checkbox"/> Review prior campaign performance, opportunities, and challenges</li> <li><input type="checkbox"/> Determine campaign plan and timeframe</li> <li><input type="checkbox"/> Schedule kickoff, UWNSV speaker, and special events</li> <li><input type="checkbox"/> Promote the campaign and share calendar with employees</li> <li><input type="checkbox"/> Send CEO kickoff letter endorsing the campaign</li> </ul> <p>Target date _____</p>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Hold kickoff event with UWNSV speaker</li> <li><input type="checkbox"/> Ensure all employees have access to campaign materials and giving platform</li> <li><input type="checkbox"/> Hold a leadership giving event</li> <li><input type="checkbox"/> Share success stories, community facts, and photos via intranet</li> <li><input type="checkbox"/> Conduct special events and lunch-and-learn sessions</li> <li><input type="checkbox"/> Monitor progress toward your goal</li> <li><input type="checkbox"/> Remind employees who have not yet pledged</li> <li><input type="checkbox"/> Send reminders about events, incentives, and deadlines</li> </ul> <p>Target date _____</p>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Ensure all pledges are received</li> <li><input type="checkbox"/> Follow up on company match contributions</li> <li><input type="checkbox"/> Provide UWNSV with employee pledge list (name, amount, # of payrolls)</li> <li><input type="checkbox"/> Calculate results and prepare final report for your UWNSV contact</li> <li><input type="checkbox"/> Announce results to all employees</li> <li><input type="checkbox"/> Post campaign photos on your organization's social media</li> <li><input type="checkbox"/> Evaluate challenges and successes – keep notes for next year</li> <li><input type="checkbox"/> Thank all donors with a celebration event or CEO letter</li> <li><input type="checkbox"/> Talk to your UWNSV rep about how to improve next cycle</li> </ul> <p>Target date _____</p>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Keep employees updated on UWNSV activities and community outcomes</li> <li><input type="checkbox"/> Promote volunteer opportunities with portfolio partners</li> <li><input type="checkbox"/> Attend UWNSV events (kickoff, closing celebration, community tours)</li> <li><input type="checkbox"/> Share impact stories and community data with your team</li> <li><input type="checkbox"/> Schedule a portfolio partner tour for employees</li> <li><input type="checkbox"/> Host a drive or fundraising event to keep energy alive</li> <li><input type="checkbox"/> Offer lunch-and-learn sessions on community needs</li> </ul> <p>Target date _____</p>

**RESOURCES AVAILABLE FROM UWNSV**

Your UWNSV representative can provide campaign activity ideas, success stories, email templates, marketing materials, and community impact data to support every phase of your campaign. Contact us at [impact@unitedwaynsv.com](mailto:impact@unitedwaynsv.com) or **540-536-1610** to get started.

## CAMPAIGN BEST PRACTICES

<p><b>1</b></p> <p><b>Assemble a team</b></p> <p>Invite members from various departments to help plan and execute. This spreads the word and ensures all teams are included.</p>	<p><b>2</b></p> <p><b>Get leadership involved</b></p> <p>Employees give more when they see leaders actively participating. Ask executives to speak at kickoffs and attend events.</p>	<p><b>3</b></p> <p><b>Incentivize</b></p> <p>Award prizes like PTO, company swag, and gift cards. The sooner employees pledge, the more drawings or perks they qualify for.</p>	<p><b>4</b></p> <p><b>Communicate</b></p> <p>Share events well in advance and send daily updates during the campaign. Use ALICE data and impact stories to connect the ask to community need.</p>	<p><b>5</b></p> <p><b>Celebrate &amp; thank donors</b></p> <p>Share the impact with your team. Thank every donor so everyone feels the weight of what they made possible in the Valley.</p>
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## IDEAS FROM OTHER CAMPAIGN COORDINATORS

<p><b>DEPARTMENT COMPETITIONS</b></p> <p><i>"Change Wars – add coins to your team's jar to win, or add dollars to a rival jar to count as negatives against them. It's been our most successful event for raising money."</i></p> <p>– Campaign coordinator, manufacturing company</p>	<p><b>DAILY DRAWINGS</b></p> <p><i>"Employees know the sooner they pledge, the more drawings they qualify for. We typically reach 60-65% of our dollar goal in the first two days of the campaign."</i></p> <p>– Campaign coordinator, financial services company</p>	<p><b>LEVERAGE LEADERSHIP</b></p> <p><i>"Our executive committee leads a dynamic competition across departments. It not only energizes our campaign – it signals to every employee that this investment matters at the top."</i></p> <p>– Campaign coordinator, technology company</p>
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# CAMPAIGN SIGN-ON FORM

Complete this form and return it to your UWNSV representative to enroll your organization in the 2026 Workplace Investment Campaign.

## COMPANY CAMPAIGN WORKSHEET

Complete and return to your UWNSV representative

### KEY CONTACTS

COMPANY NAME		CAMPAIGN YEAR
CAMPAIGN CHAMPION (NAME & TITLE)	CHAMPION EMAIL	CHAMPION PHONE
PAYROLL CONTACT (NAME & TITLE)	PAYROLL CONTACT EMAIL	CEO / APPROVING EXECUTIVE

### EMPLOYEE & DEPARTMENT MAKEUP

TOTAL EMPLOYEES	FULL-TIME	PART-TIME	NUMBER OF DEPARTMENTS
Department Name	Dept. Head / Contact	No. of Employees	Notes

### PAYROLL PROCESS & PLEDGE INFORMATION

<b>PAYROLL FREQUENCY</b> <input type="checkbox"/> Weekly <input type="checkbox"/> Bi-weekly <input type="checkbox"/> Semi-monthly <input type="checkbox"/> Monthly	<b>PLEDGE COLLECTION METHOD</b> <input type="checkbox"/> Payroll deduction <input type="checkbox"/> Online portal <input type="checkbox"/> Both	
PAY PERIODS IN CAMPAIGN YEAR	FIRST DEDUCTION DATE	LAST DEDUCTION DATE

**How it works:** After your campaign closes, provide UWNSV with a list of participating employees including each employee's name, pledge amount, and number of payroll deductions. Deductions are remitted to UWNSV on the schedule you establish with your rep.

### COMPANY MATCH

<b>IS YOUR COMPANY OFFERING A MATCH?</b> <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Under consideration		
MATCH RATIO (E.G. 1:1, 0.5:1)	MATCH CAP PER EMPLOYEE (\$)	TOTAL MATCH BUDGET (\$)
MATCH ELIGIBILITY NOTES (FULL-TIME ONLY, TENURE REQUIREMENTS, ETC.)		

### YOUR COMPANY'S INVESTMENT FOCUS — NEW FOR 2026

#### Named Investment Areas

Choose to direct your investment toward one or more of the four community portfolio areas below, or invest across all four — letting the community investment team direct capital where data shows it is needed most.

- |   |  |   |  |
|---|--|---|--|
| <input type="checkbox"/> <b>Healthy Community</b><br>Healthcare access, mental health, wellness, and coordinated care for Valley families | <input type="checkbox"/> <b>Youth Opportunity</b><br>Kindergarten readiness, tutoring, mentorship, and workforce pathways for young people | <input type="checkbox"/> <b>Financial Security</b><br>Eviction prevention, emergency assistance, and access to opportunity for ALICE families | <input type="checkbox"/> <b>Community Resiliency</b><br>Basic needs, shelter, food access, and systems that stabilize families in crisis |
|---|--|---|--|

### INVESTMENT AREA NOTES / PREFERENCES

### CAMPAIGN GOALS

Goal	Target	Notes
Total campaign investment (\$)		
Employee participation rate (%)		
Average employee pledge per pay period (\$)		
Company match amount (\$)		
Combined total (employee + match)		

### AUTHORIZATION & SIGNATURE

By signing below, the authorized representative confirms this organization's participation in the 2026 UWNSV Workplace Investment Campaign and agrees to provide employee pledge data and remit payroll deductions on the agreed schedule.

AUTHORIZED SIGNATURE	TITLE	DATE
PRINTED NAME		

# CAMPAIGN CLOSE-OUT FORM

Complete at the conclusion of your campaign and submit with your Campaign Record Keeping sheet, Employee Donations tab, and all checks to UWNSV.

## CAMPAIGN SUMMARY

Complete and return to your UWNSV representative

COMPANY NAME

CAMPAIGN COORDINATOR

CAMPAIGN CLOSE DATE

## FINAL CAMPAIGN RESULTS

TOTAL EMPLOYEES

NUMBER OF DONORS

PARTICIPATION RATE (%)

Metric	Goal	Actual	Notes
Total employee pledges (\$)			
Company match (\$)			
Special event / fundraiser proceeds (\$)			
Average employee gift per pay period (\$)			
<b>Combined Campaign Total</b>			

## PAYMENT METHOD BREAKDOWN

Method	# of Investors	Pledge Amount (\$)	Amount Collected (\$)
Payroll Deduction			
Cash			
Check			
Credit Card / Direct Bill			
Special Events / Fundraisers			
<b>Grand Total</b>			

## SUBMISSION CHECKLIST

- Campaign Record Keeping sheet signed & dated
- Employee Donations tab attached (example rows deleted)
- Grand Totals match across both documents
- All checks made payable to United Way of Northern Shenandoah Valley
- Event & Activity Verification sheets attached (if applicable)
- Close-out email sent to UWNSV contact
- Collection or drop-off scheduled
- All pledges submitted through online pledge form
- Company match documentation included

## CLOSE-OUT EMAIL TEMPLATE

**TO** Kwilt@unitedwaynsv.org  
**CC** agail@unitedwaynsv.org  
**SUBJECT** [Your Organization] 2026 Campaign — Close-Out

Hi Kim and Andy,

Our 2026 campaign has closed. Our Grand Total is \$\_\_\_\_\_. Please let us know if you'd prefer to arrange a pickup or if we should plan a drop-off at 329 N. Cameron Street.

Thank you — [Your Name]

**Drop-off:** 329 N. Cameron Street, Suite 201, Winchester, VA 22601  
**Contact:** Kim Wilt · Kwilt@unitedwaynsv.org · 540-536-1610

## CAMPAIGN NOTES & REFLECTION

WHAT WORKED WELL THIS YEAR?

\_\_\_\_\_  
\_\_\_\_\_

WHAT WOULD YOU DO DIFFERENTLY NEXT YEAR?

\_\_\_\_\_  
\_\_\_\_\_

ADDITIONAL NOTES FOR YOUR UWNSV REP

## COORDINATOR SIGN-OFF

By signing below, the coordinator confirms that all totals have been verified, all documents are complete and attached, and this submission represents the final campaign results.

COORDINATOR SIGNATURE

TITLE

DATE

\_\_\_\_\_  
\_\_\_\_\_