

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 | 540.536.1610 | 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

- ☐ Schedule a UWNSV call or Teams meeting for program overview
- ☐ Attend UWNSV coordinator training
- ☐ Secure CEO / senior leadership support
- ☐ Set participation goal, monetary goal, and incentives
- ☐ Recruit a team and assign tasks by department
- ☐ Meet with your UWNSV rep to develop a calendar of events
- ☐ Review prior campaign performance, opportunities, and challenges
- ☐ Determine campaign plan and timeframe
- ☐ Schedule kickoff, UWNSV speaker, and special events
- ☐ Promote the campaign and share calendar with employees
- ☐ Send CEO kickoff letter endorsing the campaign

Target date _____

DURING THE CAMPAIGN

- ☐ Hold kickoff event with UWNSV speaker
- ☐ Ensure all employees have access to campaign materials and giving platform
- ☐ Hold a leadership giving event
- ☐ Share success stories, community facts, and photos via intranet
- ☐ Conduct special events and lunch-and-learn sessions
- ☐ Monitor progress toward your goal
- ☐ Remind employees who have not yet pledged
- ☐ Send reminders about events, incentives, and deadlines

Target date _____

AFTER THE CAMPAIGN

- ☐ Ensure all pledges are received
- ☐ Follow up on company match contributions
- ☐ Provide UWNSV with employee pledge list (name, amount, # of payrolls)
- ☐ Calculate results and prepare final report for your UWNSV contact
- ☐ Announce results to all employees
- ☐ Post campaign photos on your organization's social media
- ☐ Evaluate challenges and successes – keep notes for next year
- ☐ Thank all donors with a celebration event or CEO letter
- ☐ Talk to your UWNSV rep about how to improve next cycle

Target date _____

THROUGHOUT THE YEAR

- ☐ Keep employees updated on UWNSV activities and community outcomes
- ☐ Promote volunteer opportunities with portfolio partners
- ☐ Attend UWNSV events (kickoff, closing celebration, community tours)
- ☐ Share impact stories and community data with your team
- ☐ Schedule a portfolio partner tour for employees
- ☐ Host a drive or fundraising event to keep energy alive
- ☐ Offer lunch-and-learn sessions on community needs

Target date _____

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 or 540-536-1610 to get started.

CAMPAIGN BEST PRACTICES

1

Assemble a team

Invite members from various departments to help plan and execute. This spreads the word and ensures all teams are included.

2

Get leadership involved

Employees give more when they see leaders actively participating. Ask executives to speak at kickoffs and attend events.

3

Incentivize

Award prizes like PTO, company swag, and gift cards. The sooner employees pledge, the more drawings or perks they qualify for.

4

Communicate

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.

5

Celebrate & thank donors

Share the impact with your team. Thank every donor so everyone feels the weight of what they made possible in the Valley.

IDEAS FROM OTHER CAMPAIGN COORDINATORS

DEPARTMENT COMPETITIONS

"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."

– Campaign coordinator, manufacturing company

DAILY DRAWINGS

"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."

– Campaign coordinator, financial services company

LEVERAGE LEADERSHIP

"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."

– Campaign coordinator, technology company



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

Complete and return to your UWNSV representative

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

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

PAYROLL FREQUENCY ☐ Weekly ☐ Bi-weekly ☐ Semi-monthly ☐ Monthly		PLEDGE COLLECTION METHOD ☐ Payroll deduction ☐ Online portal ☐ Both	
PAY PERIODS IN CAMPAIGN YEAR		FIRST DEDUCTION DATE	
PAY PERIODS IN CAMPAIGN YEAR		LAST DEDUCTION DATE	

IS YOUR COMPANY OFFERING A MATCH?
☐ Yes
 ☐ No
 ☐ Under consideration

MATCH RATIO (E.G. 1:1, 0.5:1)

MATCH CAP PER EMPLOYEE (\$)

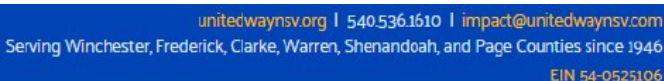
TOTAL MATCH BUDGET (\$)

MATCH ELIGIBILITY NOTES (FULL-TIME ONLY, TENURE REQUIREMENTS, ETC.)

INVESTMENT AREA NOTES / PREFERENCES

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

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
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FINAL CAMPAIGN RESULTS

TOTAL EMPLOYEES	NUMBER OF DONORS	PARTICIPATION RATE (%)
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Metric	Goal	Actual	Notes
Total employee pledges (\$)			
Company match (\$)			
Special event / fundraiser proceeds (\$)			
Average employee gift per pay period (\$)			
Combined Campaign Total			

PAYMENT METHOD BREAKDOWN

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

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

impact@unitedwaynsv.org

SUBJECT

[Your Organization] 2026 Campaign — Close-Out

Hi Kim,

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?
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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
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