

Workplace Campaign Roadmap & Checklist



A simple, two-week plan for inspiring generosity and strengthening Berkshire County.

Thank you for bringing your workplace together for our community. Every invitation, story, gift, and volunteer effort helps strengthen a countywide network of support.

Your campaign snapshot

Workplace / organization: _____	Campaign coordinator: _____
Campaign dates: _____	Giving format: ☐ Digital ☐ Paper ☐ Hybrid
Campaign goal: _____	BUW presentation / activity: _____

4-6 WEEKS BEFORE

Connect & Plan

- ☐ **Meet with your BUW contact** – confirm campaign dates, giving format, goals, and the support that would be most helpful.
- ☐ **Connect with workplace leadership** – invite a visible, sincere endorsement and discuss any corporate gift or match.
- ☐ **Recruit a small campaign team** – include colleagues who can help reach departments, shifts, locations, or remote employees.
- ☐ **Choose a meaningful goal** – consider participation, dollars raised, volunteer engagement, or another goal that fits your workplace

2-3 WEEKS BEFORE

Prepare & Build Awareness

- ☐ **Confirm giving tools** – request a customized online campaign page and/or printable or fillable pledge form.
- ☐ **Create your communication plan** – schedule the kickoff, leadership message, impact stories, reminders, and closing thank you.
- ☐ **Plan an engagement opportunity** – consider a BUW presentation, local impact conversation, volunteer activity, or simple team event.
- ☐ **Make participation accessible** – provide clear instructions and include employees across schedules, worksites, and communication channels.
- ☐ **Share a “coming soon” message** – announce the dates and let employees know how they can learn, give, or volunteer.

Keep it simple: a clear timeline, meaningful local story, easy way to participate, and sincere thank-you can make a campaign successful.

Launch, Inspire & Celebrate

Keep the invitation clear, the experience meaningful, and gratitude at the center.

CAMPAIGN WEEK 1	Launch & Inspire
☐	Send the campaign kickoff message – explain why your workplace is participating and provide one clear path to give.
☐	Share leadership's endorsement – reinforce that community engagement is valued and giving is always a personal choice.
☐	Bring the impact to life – feature a local story, BUW presentation, or “Did You Know?” example.
☐	Invite every employee to participate – make the invitation welcoming, inclusive, and free from pressure.
☐	Thank early participants – recognize their generosity and help build positive momentum.

CAMPAIGN WEEK 2	Remind & Encourage
☐	Share a friendly mid-campaign reminder – celebrate progress without identifying individual donors or amounts.
☐	Explain payroll giving – show how manageable gifts from each paycheck can add up across the year.
☐	Offer another way to engage – share a volunteer opportunity, impact story, or brief campaign activity.
☐	Send a final reminder – include the deadline and the simplest possible way to participate.
☐	Check for questions or barriers – make sure employees know where to get help.

WITHIN 1 WEEK AFTER	Thank & Celebrate
☐	Thank everyone – recognize donors, volunteers, campaign helpers, leadership, and all who took time to learn.
☐	Share the collective result – celebrate participation, generosity, and the difference your workplace is helping make.
☐	Submit campaign materials – return pledge information, gifts, and any required payroll report securely to BUW.

WITHIN 2 WEEKS AFTER	Reflect & Close the Loop
☐	Complete the campaign results / wrap-up form – report totals, participation, activities, and feedback.
☐	Debrief with BUW and your campaign team – note what worked, what employees responded to, and what to change next year.
☐	Save key information – retain dates, communications, results, and recommendations for the next coordinator or campaign.

YEAR-ROUND	Stay Connected
☐	Share occasional BUW impact updates and volunteer opportunities with employees.
☐	Welcome new employees – include workplace giving information when appropriate in onboarding.

☐	Celebrate your workplace partnership and continue building a culture of community involvement.
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