



CAMPAIGN WORKSHEET

1. INVOLVE TOP MANAGEMENT

CEO INVOLVEMENT: _____

INCENTIVES: _____

CORPORATE GIFT: _____

KICK-OFF DATE(S): _____

2. BUILD YOUR TEAM

TEAM MEMBERS: _____

UNITED WAY STAFF/
VOLUNTEER: _____

TEAM MEETING DATE(S): _____

3. DEVELOP GOAL AND/OR THEME

CAMPAIGN GOAL
(\$ OR % INCREASE) _____

CAMPAIGN THEME _____

SPECIAL EVENT(S) _____

HOW WILL YOU SHARE
THIS INFORMATION? _____

4. DEVELOP LEADERSHIP GIVING

NUMBER OF 2017
LEADERSHIP DONORS _____ GOAL FOR 2018 _____

LEADERSHIP GIVING CHAIR _____

LEADERSHIP GIFT SOLICITATION
PLAN (EX. PEER-TO-PEER ASK) _____

5. PROMOTE AND PUBLICIZE

VEHICLES TO COMMUNICATE WITH EMPLOYEES:

- REQUEST CAMPAIGN MATERIALS (BLUE FORM)

PUBLICITY TIMELINE & RESPONSIBLE PARTIES:

6. LAUNCH YOUR CAMPAIGN

DATE: _____ **TIME:** _____ **LOCATION:** _____

HOW WILL EMPLOYEES BE INVITED TO KICK-OFF?

(WILL YOU NEED MULTIPLE DATES?) _____

KICK-OFF AGENDA CHECKLIST:

- CEO SPEAKER/ENDORSEMENT AGENCY SPEAKER (OPTIONAL) UNITED WAY SPEAKER
 CAMPAIGN VIDEO UNITED WAY MATERIALS PLEDGE FORMS

PLEDGE FORMS DUE: _____ **GIVE PLEDGE FORMS TO:** _____

KICK-OFF FOCUS/TOPICS: _____

VOLUNTEER PROJECT(S): _____

7. WRAP UP AND REPORT RESULTS

PLEDGE REMINDER SCHEDULE & VEHICLE

EMAIL PRINTED REMINDER IN MAILBOX OTHER: _____

DATE(S): _____

- ANALYZE RESULTS & DETERMINE FOLLOW-UP STEPS
 COMPLETE SPECIAL EVENTS & FUNDRAISERS (OPTIONAL)
 COLLECT DONATIONS (PLEDGE FORMS & ANY ONE-TIME GIFTS)
 RECORD PLEDGES ON REPORTING ENVELOPE INSERTS OR ON ELECTRONIC FORM (PRINT & INCLUDE)
 MAKE COPIES OF PLEDGE FORMS AND GIVE TO UNITED WAY
 GIVE ORIGINAL FORMS TO PAYROLL
 PACKAGE & TURN-IN REPORTING ENVELOPE AND MATERIAL TO UNITED WAY

8. THANK EVERYONE AND CELEBRATE SUCCESS

PLAN TO PUBLICIZE SUCCESS:

(EX. NEWSLETTER, SOCIAL MEDIA) _____

THANK YOU EVENT FOR EMPLOYEES (OPTIONAL BUT RECOMMENDED)

DATE: _____ **TIME:** _____ **LOCATION:** _____

WHO SHOULD RECEIVE THANK YOU NOTES

(EX. KEY VOLUNTEERS, DONORS) _____