

CAMPAIGN PLANNING WORKSHEET

PHASE ONE (6 WEEKS BEFORE KICK OFF)	X	NOTES FOR FOLLOW UP
Meet with United Way staff member		
Obtain CEO endorsement and support		
Recruit Campaign Team		
Train Team/Assign Tasks		
Develop Campaign Plan		
• Goal		
• Timetable		
• Publicity/Promotions		
• Incentives		
PHASE TWO (4 WEEKS BEFORE KICK OFF)	X	NOTES FOR FOLLOW UP
Develop a Leadership Giving Campaign		
Secure management's approval of plan		
Plan and market the campaign kick-off		
Schedule/Announce campaign kick-off		
Arrange for speaker		
Send letter from Top Executive to all employees		
PHASE THREE (FINAL WEEK BEFORE KICK OFF)	X	NOTES FOR FOLLOW UP
Send reminder about Kick-off		
Arrange for announcements at company meetings		
Re-check food and beverage orders for special events		
KICK-OFF	X	NOTES FOR FOLLOW UP
PHASE FOUR (ONE WEEK AFTER KICK OFF)	X	NOTES FOR FOLLOW UP
Report progress to United Way		
Send reminders to employees as needed		
PHASE FIVE (THREE WEEKS AFTER KICK OFF)	X	NOTES FOR FOLLOW UP
Host a thank you event		
Submit final results to United Way		