1. **CREATE YOUR PLAN** for including top management.

2. **BUILD YOUR TEAM.** List the people you have or will recruit to help with your campaign.

3. **ESTABLISH GOALS.**
   - Initial planning meeting date: ________ Follow-up meetings: ______________________
   - Campaign Start date: ____/____/______  Campaign End date: ____/____/______

<table>
<thead>
<tr>
<th>Prior Year Results</th>
<th>Current Year Goal</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total dollars raised</td>
<td></td>
</tr>
<tr>
<td>Corporate gift</td>
<td></td>
</tr>
<tr>
<td>Employee pledges</td>
<td></td>
</tr>
<tr>
<td>Special fundraising events</td>
<td></td>
</tr>
<tr>
<td>Employee participation %</td>
<td></td>
</tr>
<tr>
<td>Employee per capita</td>
<td></td>
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</tbody>
</table>

4. Identity a plan to increase the number of Leadership Givers, Emerging Leaders and Loyal Donors
   - Leadership Givers (donors giving $1,000 +) Goal ___________
   - Emerging Leaders (recommended for age 40 and under giving $500 or more). Goal __________
   - Loyal Donors (those giving 10-24 or 25+ years) Goal ________________________________

5. Determine if and how you will have fun with themes and/or special event activities.

____________________________________________________________________________________________
____________________________________________________________________________________________

6. Educate and build awareness about United Way. List your ideas for communicating the message and keeping people engaged.

____________________________________________________________________________________________
____________________________________________________________________________________________

7. Invite people to invest. Explain how associates will be given their pledge forms and how they’ll be asked to turn them in.

____________________________________________________________________________________________
____________________________________________________________________________________________

8. Determine how your results be tracked and reported.

____________________________________________________________________________________________
____________________________________________________________________________________________

9. Identify how you will thank and recognize people.

____________________________________________________________________________________________
____________________________________________________________________________________________


____________________________________________________________________________________________