

Campaign planning worksheet

- 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: ____/____/____

	Prior Year Results	Current Year Goal
Total dollars raised		
Corporate gift		
Employee pledges		
Special fundraising events		
Employee participation %		
Employee per capita		

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.

10. Generate ideas for year-round promotion of the United Way message.
