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

4. Identify 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.
   ____________________________________________________________________________________

    ____________________________________________________________________________________