

# Campaign planning worksheet

- CREATE YOUR PLAN** for including top management.
- BUILD YOUR TEAM.** List the people you have or will recruit to help with your campaign.
- 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		

- 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 \_\_\_\_\_
- Determine if and how you will have fun with themes and/or special event activities.  
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 \_\_\_\_\_
- Educate and build awareness about United Way. List your ideas for communicating the message and keeping people engaged.  
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 \_\_\_\_\_
- Invite people to invest. Explain how associates will be given their pledge forms and how they'll be asked to turn them in.  
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 \_\_\_\_\_
- Determine how your results be tracked and reported.  
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- Identify how you will thank and recognize people.  
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- Generate ideas for year-round promotion of the United Way message.  
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