

CAMPAIGN PLANNING WORKSHEET

Include Top Management

Your plan for including top management throughout the campaign.

Get Help

List the people you have or will recruit to help with your campaign.

Set Goals!

Initial planning date:

Follow-up meeting dates:

Campaign start date:

Campaign end date:

Campaign History

	2016 Goals	2015	2014
Total Dollars Raised			
Corporate Gift			
Employee Pledges			
Special Events			
Employee Participation %			
Number of Donors			

Identify Leadership Givers

(donors giving \$500+)

List potential Leadership Givers.

Identify Potential Emerging Leaders

(young professionals interested in volunteerism)

List potential Emerging Leader names.

Determine if and how you will have fun with themes and/or special events.

Promote United Way

List your ideas for communicating the message and keeping people engaged.

Run the Campaign

Explain how your staff will be given their pledge forms and how they'll be asked to turn them in.

Track Results

How will you track and report results?

Thanks and Recognition

How will you thank and recognize donors and committee members?

Year-Round Engagement

What ideas do you have for year-round promotion of the United Way message?