

Campaign Planning Checklist

Team Member
Responsible

Target
Date

Activity
Complete

Before Campaign

- | | | | |
|--|-------|-------|--------------------------|
| 1. Recruit a diverse Campaign Team | _____ | _____ | <input type="checkbox"/> |
| 2. Learn about United Way of East Central Alabama & <i>what matters</i> at a United Way Coordinator Training | _____ | _____ | <input type="checkbox"/> |
| 3. Meet with your United Way representative | _____ | _____ | <input type="checkbox"/> |
| 4. Train your Campaign Team/ Set up other planning meetings | _____ | _____ | <input type="checkbox"/> |
| 5. Review past campaign results | _____ | _____ | <input type="checkbox"/> |
| 6. Determine areas of potential | _____ | _____ | <input type="checkbox"/> |
| 7. Identify strengths and weaknesses | _____ | _____ | <input type="checkbox"/> |
| 8. Determine campaign needs (budget, etc.) | _____ | _____ | <input type="checkbox"/> |
| 9. Develop a plan based on Campaign Analysis | _____ | _____ | <input type="checkbox"/> |
| 10. Meet with CEO for support/approval & request for visibility & support during the Campaign | _____ | _____ | <input type="checkbox"/> |
| 11. Set the Goal (or review preset goal) | _____ | _____ | <input type="checkbox"/> |
| 12. Establish a campaign timeline | _____ | _____ | <input type="checkbox"/> |
| 13. Schedule agency tours and speakers | _____ | _____ | <input type="checkbox"/> |
| 14. Create special themes and fun-filled events | _____ | _____ | <input type="checkbox"/> |
| 15. Launch a PR campaign to communicate with employees | _____ | _____ | <input type="checkbox"/> |
| 16. Personalize the pledge cards if applicable | _____ | _____ | <input type="checkbox"/> |
| 17. Send CEO/Labor/Dept. Head endorsement letters | _____ | _____ | <input type="checkbox"/> |

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During Campaign

18. Conduct Leadership Giving Solicitation (meeting or face to face)

19. Solicitor Training (for companies that require department or location solicitors)

20. Campaign Kick-off & special events

21. Hold employee meetings/tell the UW story & make the ask

22. Conduct one-on-one solicitations

23. ALL PLEDGE CARDS IN

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After Campaign

24. Gather all pledge cards

25. Obtain restaurant discount cards from Account Coordinator and distribute to employees who gave.

26. Give Payroll Deduct set of copies to payroll dept.

27. Total campaign results excluding anything previously reported to UW

28. Complete United Way Report Envelope

28. Give all information to your Account Coordinator

29. Implement THANK YOU campaign

30. Organize information for next year's campaign
