



PLANNING YOUR CAMPAIGN

Use this schedule as a handy chart in planning your company's campaign.

Getting Started

	Completion Date	Assigned To
Meet with previous chair to review activities and results	_____	_____
Meet with United Way representative to discuss campaign strategies and review materials	_____	_____
Meet with CEO to discuss campaign goals and obtain endorsement	_____	_____
Develop campaign strategy with Leadership Chair	_____	_____
Recruit campaign team	_____	_____

Planning the Campaign

Establish Campaign Timetable	_____	_____
Set goals to increase employee total, average gift, gifts to the Community Investment Fund, leadership gifts, and participation	_____	_____
Develop incentive plan to support objectives	_____	_____
Order campaign supplies from your United Way representative	_____	_____
Request incentives from vendors, employees, management-level employees, etc.	_____	_____
Decide solicitation process (one-to-one, group, electronic)	_____	_____
Select dates and reserve rooms for: <ul style="list-style-type: none"> • Campaigner training • Leadership meeting • Employee meeting(s) • Recruit campaigners/solicitors 	_____	_____
Plan kickoff event, activities, special events, and closing events	_____	_____
Plan publicity: newsletter, email, payroll stuffer, and posters	_____	_____
Develop CEO support letter and review with CEO	_____	_____
Schedule agency tours/fairs/speakers	_____	_____
Establish record-keeping/reporting process	_____	_____
For electronic campaigns, test electronic pledge system	_____	_____