

# WORKPLACE CAMPAIGN PLANNING SHEET



Your Name: \_\_\_\_\_ Workplace: \_\_\_\_\_

Phone: \_\_\_\_\_ E-mail: \_\_\_\_\_

1. GET HELP. List the people, including management, you've recruited to help champion your campaign.

Management: \_\_\_\_\_ E-mail: \_\_\_\_\_

Co-worker: \_\_\_\_\_ E-mail: \_\_\_\_\_

2. BEST PRACTICES. Which of the following best practices do you plan to use in your campaign?

\_\_\_\_\_ United Way presentation (Recommended. Please call Caroline Horne at 985-2627 to schedule.)

\_\_\_\_\_ Upper management endorsement/participation

\_\_\_\_\_ Loyal Contributor recognition program

\_\_\_\_\_ "Fun"-raiser (If so, what?) \_\_\_\_\_

\_\_\_\_\_ Prizes/incentives for participation (If so, what?) \_\_\_\_\_

\_\_\_\_\_ E-mail campaign

4. SETTING AND ACHIEVING GOALS.

Campaign dates (Plan to complete your campaign by October 31st. The main pledge form solicitation period should last no longer than two to three weeks.)

Start: \_\_\_\_/\_\_\_\_/2020 End: \_\_\_\_/\_\_\_\_/2020

5. REPORTING RESULTS.

Use your United Way reporting envelope to audit pledge forms and monies before submitting.

6. DON'T FORGET TO SAY THANKS. How you will help us thank those who make a gift?

\_\_\_\_\_

**Campaign 2020 Total Gift: \$** \_\_\_\_\_

From Firm Fact Sheet

Employee giving \$ \_\_\_\_\_ Corporate Gift \$ \_\_\_\_\_

**Campaign 2021 Goal: \$** \_\_\_\_\_

Employee giving \$ \_\_\_\_\_ Corporate Gift \$ \_\_\_\_\_