

# CAMPAIGN PLANNING WORKSHEET

<b>PHASE ONE (at least six weeks before kickoff)</b>	✓	<b>NOTES FOR FOLLOW UP</b>
Meet with United Way NCA Representative		
Obtain CEO endorsement and support		
Recruit campaign team		
Get sales tax license for auction (as applicable)		
Train team/assign tasks		
Develop campaign plan:		
Goal		
Timetable		
Publicity/Promotions		
Incentives		
<b>PHASE TWO (at least four weeks before kickoff)</b>	✓	<b>NOTES FOR FOLLOW UP</b>
Develop a Leadership Giving campaign		
Secure management's approval of plan		
Plan and market the campaign kickoff		
Schedule/announce campaign kickoff		
Arrange member nonprofit speakers and tours		
Send letter from top executive to all employees		
<b>PHASE THREE (in the final week before kickoff)</b>	✓	<b>NOTES FOR FOLLOW UP</b>
Send reminder about kickoff meetings		
Arrange for announcements at company meetings		
Re-check food and beverage orders for expected turnout		
<b>KICKOFF</b>		
<b>PHASE FOUR (one week after kickoff)</b>	✓	<b>NOTES FOR FOLLOW UP</b>
Report progress to United Way NCA Representative		
Send reminders to employees		
<b>PHASE FIVE (three weeks after kickoff)</b>	✓	<b>NOTES FOR FOLLOW UP</b>
Host a thank you event		
Submit final results to United Way NCA Representative		
<b>PHASE SIX (anytime throughout the year)</b>	✓	<b>NOTES FOR FOLLOW UP</b>
Attend United Way NCA events		
Participate in Day of Caring volunteer opportunities		
Offer new hires the chance to give through payroll contribution		