

CAMPAIGN PLANNING WORKSHEET

PHASE ONE (at least six weeks before kickoff)	✓	NOTES FOR FOLLOW UP
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:		
Campaign Fundraising Goal		
United Way NCA Fundraising Goal		
Employee Participation Goal (%)		
Timetable		
Publicity/Promotions		
Incentives		
PHASE TWO (at least four weeks before kickoff)	✓	NOTES FOR FOLLOW UP
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		
PHASE THREE (in the final week before kickoff)	✓	NOTES FOR FOLLOW UP
Send reminder about kickoff meetings		
Arrange for announcements at company meetings		
Re-check food and beverage orders for expected turnout		
KICKOFF		
PHASE FOUR (one week after kickoff)	✓	NOTES FOR FOLLOW UP
Report progress to United Way NCA Representative		
Send reminders to employees		
PHASE FIVE (three weeks after kickoff)	✓	NOTES FOR FOLLOW UP
Host a thank you event		
Submit final results to United Way NCA Representative		
PHASE SIX (anytime throughout the year)	✓	NOTES FOR FOLLOW UP
Attend United Way NCA events		
Participate in Day of Caring volunteer opportunities		
Offer new hires the chance to give through payroll contribution		



United Way of the
National Capital Area

UnitedWayNCA.org

**WHEN NONE ARE IGNORED,
ALL WILL THRIVE.**