Campaign Planning Checklist

Before Campaign

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

Campaign Planning Checklist

During Campaign

Item	Team Member Responsible	Target Date	Activity Complete
18. Conduct Leadership Solicitation (meeting or face to face)			☐
19. Solicitor Training (for large 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. <u>ALL PLEDGE CARDS IN</u>			☐

After Campaign

Item	Team Member Responsible	Target Date	Activity Complete
24. Gather all pledge cards with completed information such as Matching dollars, Designations, Leadership giving spreadsheet, etc. to be included in results packet			☐
25. Give Payroll Deduct set of copies to payroll dept.			☐
26. Total campaign results excluding anything previously reported at UW			☐
27. COMPLETE AND SIGN Results Envelope			☐
28. Give all information to your Loaned Executive			☐
29. Implement THANK YOU campaign			☐
30. Organize information for next year's campaign team			☐