

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 September 30.** The main pledge form solicitation period should last no longer than two to three weeks.)

Start: ____/____/2021 End: ____/____/2021

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 2021 Total Gift: \$ _____

From Firm Fact Sheet

Employee giving \$ _____

Corporate Gift \$ _____

Campaign 2022 Goal: \$ _____

Employee giving \$ _____

Corporate Gift \$ _____