

CAMPAIGN PLAN WORKSHEET

1 – Involve Your Company Leadership

Enlist the support of your President / CEO / Superintendent, etc. to have them endorse the campaign in a letter to all employees, encourage giving and participate in your employee group meetings.

2 – Recruit a Team

Don't do it alone! Recruit campaign committee representatives from your organization. Include salaried and hourly employees and people with United Way experience if possible.

3 – Develop a Plan

- Set a specific time frame for the start and finish of your campaign. Keep it short – you want your campaign to be fresh. Our suggestion is to allow 1-2 weeks for solicitation and 1-2 weeks for follow-up on contributions and reports.
- Set campaign goals.
- Plan promotion and publicity for your campaign using company newsletters, bulletin board, payroll stuffers, e-mail, etc. Days off with pay, donated items, or even merchandise from your own company are great ways to encourage giving.

4 – Publicize the Campaign

- Use United Way Resources
- Set a meeting with employees - remember to keep it brief! A short intensive effort usually produces the best results (30 minutes max). Hand out pledge forms and brochures.
- Email and letter templates

Use this space to sketch out ideas for your campaign.

Leadership:

Possible team members:

Campaign date: _____

Campaign \$ goal: _____

Activity ideas:

CAMPAIGN TIP SHEET (cont)

5 – Wrap-up/Follow -up

Ask every employee to return a pledge card whether they gave or not to ensure that everyone has been contacted.

6 – Say Thanks

- Say “Thank You!” Your co-workers made it happen – so give them credit. Saying THANKS is the most important part of the campaign!
- Hold an employee gathering for all employees. Ask the CEO to thank all contributors to the campaign.
- Ask the CEO to send a letter to all employees for participating in the campaign and thanking those who gave.
- Blanket the bulletin board, lunchroom, etc, with “thank you” messages. Don’t forget your company publication and e-mail! Let your co-workers know their contributions are appreciated!
- Thank your committee members ..they worked hard, too. Hold a special meeting and/ or give them a thank you note to say “thanks” for their time, energy, and commitment. A special note or letter from the CEO is also a good idea.

7 – Report and Evaluate

- Make sure all pledge cards are returned and accounted for.
- Communicate the results of your campaign to the whole organization as soon as they are available.
- Evaluate your results. A written report on your campaign with recommendations for next year will be greatly appreciated by the next campaign coordinator.

Wrap-up Date: _____

Thank-you Email Dates:

(CEO) _____

(You) _____

(Other) _____

Thank-you Activities:

Meeting Date with UW:
