



## WORKSHEET

Pre-campaign

### Recruitment and Planning

Members and roles: \_\_\_\_\_

Campaign start date: \_\_\_\_\_ Campaign end date: \_\_\_\_\_

### Set clear goals

Total pledge last year: \_\_\_\_\_ This year's total pledge goal: \_\_\_\_\_

% participation last year: \_\_\_\_\_ This year's % participation goal: \_\_\_\_\_

Other goals: \_\_\_\_\_

### Promotion and Communication

■ Order materials

■ Employee communication

■ Ceo/union endorsement letter(s)

■ Intranet

■ Event postings

■ Internal promotions

### Notes

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

During Campaign

### Campaign Events

Campaign kickoff: \_\_\_\_\_

Additional Events:

\_\_\_\_\_

\_\_\_\_\_

### Volunteer Events

Project names and volunteers needed: \_\_\_\_\_

Project dates and locations: \_\_\_\_\_

### Ask! Educate and Solicit Contributions

My donor segments (leadership, labor, ERGs): \_\_\_\_\_

Meeting date(s)/location(s) and presenters: \_\_\_\_\_

Post-campaign

### Wrap it up and say "Thank You"

Campaign close event: \_\_\_\_\_

Thank you activities and/or events: \_\_\_\_\_

Remit campaign contributions and results to United Way by: \_\_\_\_\_