Campaign Planning Checklist

	Team Member Responsible	Target Date	Activity Complete
Before Campaign			
1. Recruit a diverse Campaign Team	______________	________	☐
2. Learn about United Way of Northeast Georgia at a United Way Coordinator Training	______________	________	☐
3. Meet with your United Way 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

	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

	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. Check with Loaned Executive for any Leadership or ADT gifts sent in to UWNEGA from an individual in your company	___________	________	☐
26. Give Payroll Deduct set of copies to payroll dept.	___________	________	☐
27. Total campaign results excluding anything previously reported at UW	___________	________	☐
28. COMPLETE AND SIGN Results Envelope with LE	___________	________	☐
29. Give all information to your Loaned Executive	___________	________	☐
30. Implement THANK YOU campaign	___________	________	☐
31. Organize information for next year's campaign team	___________	________	☐