

CAMPAIGN PLANNING WORKSHEET

United Way of Central Illinois
springfieldunitedway.org



Employee Campaign Coordinator(s)

First Name	Last Name	E-mail	Phone	Location

Does your company have a committee? If so, how many members does it have?

Campaign Start Date _____ Campaign End Date _____

Strategies & Ideas

Employee Giving	Special Events	Leadership Giving	Presentations

Are there any organizational barriers/opposition to an employee giving campaign?	
Are there internal champions/ambassadors driving peer-to-peer giving? Who?	
Is someone responsible for leadership asks? Who?	
What is your plan for including top management throughout the campaign?	
Get help. List the people you have or will recruit to help with your campaign:	
How are we following up with donors who haven't contributed yet this year?	

Setting Goals

Set an initial planning date	Follow up meeting(s)	Campaign Start Date	Campaign End Date

	2017	2018 Goal
Total Dollars Raised		
Corporate Gift		
Employee Pledges		
Special Events		
Employee Participation %		
Emp. Average Gift		
Number of Donors/Leaders		

How do you communicate the message and keeping people engaged?	
Determine if and how you will have fun with themes or special events	
Are there opportunities to conduct special events or one-time asks to bolster revenue?	
Running the Campaign: Explain how associates will be given their pledge forms and how they'll be asked to turn them in.	
How will you track and report results?	
How will you thank and recognize donors and committee members?	
Ideas for year-round promotion of the United Way message?	