

WORKPLACE CAMPAIGN PLANNING MATRIX

Please contact the United Way office when you have completed tasks in RED. Thank you!



Task	Date Completed	x	Notes
Meet with your Campaign Advisor			
Obtain CEO endorsement and support			
Appoint Workplace Campaign Coordinator and recruit Volunteer Committee			
Secure Corporate Gift or Corporate Match commitment			
Request management to make appearances at kickoffs, rallies, and presentations			
Develop detailed timeline			
Develop Campaign Plan <i>Set Goal</i> <i>Determine Marketing Strategy</i> <i>Choose campaign methods & materials needed</i> <i>Set incentives</i> <i>Arrange agency speakers/tours</i> <i>Plan special events</i>			
Set date & plan Company Kickoff Event			
Send email communications to notify staff of UWVS Campaign activities			
Send letter from top executives to employees			
Calculate results to include total dollars, number of donors, number of employees, and company gift			
Thank everyone with events, letters, etc			
Report Campaign results to top executives and employees			
Report final results to Campaign Advisor and United Way & Volunteer Services			