



United Way of the
Cape Fear Area

CAMPAIGN PLANNING WORKSHEET

PHASE ONE	X	NOTES FOR FOLLOW UP
Meet with UWCFA Relationship Coordinator		
Obtain CEO endorsement and support		
Recruit campaign team		
Develop campaign plan		
Goal		
Timetable		
Publicity/Promotions		
Incentives		
PHASE TWO	X	NOTES FOR FOLLOW UP
Develop a Leadership Giving campaign		
Secure management's approval of plan		
Plan and market the campaign kickoff		
Schedule/announce campaign kickoff		
Arrange member nonprofit speakers and videos		
Send letter from top executive to all employees		
PHASE THREE	X	NOTES FOR FOLLOW UP
Send reminder about kickoff meetings		
Arrange for announcements at company meetings		
KICKOFF		
PHASE FOUR	X	NOTES FOR FOLLOW UP
Report progress to United Way Relationship Coordinator		
Send reminders to employees		
PHASE FIVE	X	NOTES FOR FOLLOW UP
Host a thank you event		
Submit final results to the Data and Finance Coordinator		