

EMPLOYEE CAMPAIGN COORDINATOR PLANNING WORKSHEET



PHASE ONE (at least six weeks before kickoff)	✓	NOTES FOR FOLLOW-UP:
Meet with United Way NCA Corporate Partnership Manager		
Obtain CEO endorsement and support		
Recruit campaign team		
Get sales tax license for auction (as applicable)		
Train team/assign tasks		
Develop campaign plan: <ul style="list-style-type: none"> • Goal • Timetable • Publicity/Promotions • Incentives 		
PHASE TWO (at least four weeks before kickoff)	✓	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 tours		
Send letter from top executive to all employees		
PHASE THREE (in the final week before kickoff)	✓	NOTES FOR FOLLOW-UP:
Send reminder about kickoff meetings		
Arrange for announcements at company meetings		
Re-check food and beverage orders for expected turnout		
KICKOFF		
PHASE FOUR (one week after kickoff)	✓	NOTES FOR FOLLOW-UP:
Report progress to United Way NCA Corporate Partnership Manager		
Send reminders to employees		
PHASE FIVE (three weeks after kickoff)	✓	NOTES FOR FOLLOW-UP:
Host a thank you event		
Submit final results to United Way NCA Corporate Partnership Manager		
PHASE SIX (anytime throughout the year)	✓	NOTES FOR FOLLOW-UP:
Attend United Way NCA events		
Participate in Days of Caring volunteer opportunities		
Offer new hires the chance to give through payroll contribution		

CHOOSE ROLES FOR MANAGEMENT AND TEAM MEMBERS Assign detailed roles and responsibilities that match managers' and employees' unique abilities and influence. Assign site coordinators for each department and at each remote location to help implement campaign strategy.