

United Way of Indian River County

2008/2009 Campaign Timeline

what matters™

<u>APRIL</u>	<u>DATE</u>	<u>TIME</u>
▪ AdT recognition preference mailing (UWA deadline: 4/30)	April 7	-----
▪ Leadership Investment Association Event	April 10	5:30 p.m.
▪ Leadership (07-08) Recognition preference mailing	April 14	-----
▪ Thermometer tear down	April 14 – 18	-----
<u>MAY</u>	<u>DATE</u>	<u>TIME</u>
▪ Initial meeting with Kip and Mary Jacoby, 08-09 Campaign Chairs	May 19	TBD
▪ Corporate Accounts survey (deadline: June 2)	May 19 & 20	-----
▪ Recruitment of Campaign Cabinet	month of May	-----
▪ Begin recruitment of Loaned Executives	month of May	-----
▪ Major Accounts team welcome letter/orientation date	month of May	-----
<u>JUNE</u>	<u>DATE</u>	<u>TIME</u>
▪ Finalize recruitment of Campaign Cabinet/welcome letters	month of June	-----
▪ Continue recruitment of Loaned Executives	month of June	-----
▪ Database Management (business/professional divisions)	month of June	-----
▪ Corporate Accounts survey data entry & follow-up	June 3-6	-----
▪ Alexis de Tocqueville (AdT) Society Survey	June 5 & 6	-----
▪ Major Account & New Account Development team Orientation and Account Call assignments	June 13	3:00 – 5:00 p.m.
▪ Schedule & conduct Account Calls with staff support	June 16-30	By appointment
▪ Allocations letter/vignette (quarterly vignettes; <i>Sept., Dec., March</i>)	June 16	-----
<u>JULY</u>	<u>DATE</u>	<u>TIME</u>
▪ Schedule & conduct Account Calls with staff support	month of July	By appointment
▪ Finalize 08/09 Loaned Executives	month of July	-----
▪ Database Management (business/professional divisions)	month of July	-----
▪ Secure Elite Campaign Sponsors (mailing: deadline 8/1)	July 1	-----
▪ Confirm 08/09 Torchbearers (mailing and personal follow-up) <i>*confirm by goal setting</i>	July 10 & 11	-----
<u>AUGUST</u>	<u>DATE</u>	<u>TIME</u>
▪ Complete Account Calls	by Aug. 8	By appointment
▪ Campaign Cabinet Orientation with Agency Speaker	Aug. 8	3:00 – 5:00 p.m.
▪ Loaned Executive Training (w/agency tours)	Aug. 14 & 15	12:00 – 5:00 p.m./ 9:00 a.m. – 5:00 p.m.
▪ ECC Rally & Training	Aug. 28	8:00 a.m. – 10:00 a.m.
▪ Board/Cabinet/LE Social (liability date)	Aug. 28	5:30 p.m.
<u>SEPTEMBER</u>	<u>DATE</u>	<u>TIME</u>
▪ Workplace Campaigns begin	month of Sept.	-----
▪ Individual Division planning meetings w/Division Chair(s) (<i>direct mail process, letter approval, signatures</i>)	Sept. 2-5	By appointment
▪ 2 nd Quarterly vignette mailing	Sept. 4 & 5	-----
▪ LE meeting (bi-weekly)	Sept. 11 & 25	8:00 a.m. – 9:00 a.m.
▪ Community Leaders Breakfast @ Oak Harbor	Sept. 9 (Tues.)	8:00 a.m. – 10:00 a.m.

- Individual meetings w/Division Chair to review goal setting spreadsheets in advance Sept. 18 & 19 by appointment
- Day of Caring Sept. 20 all day, multiple locations
- Goal setting/Campaign Cabinet meeting (4th Tuesday, monthly) Sept. 23 3:15 – 5:00 p.m.
- Direct mail solicitation begins (professionals round 1) Sept. 22 – Oct. 3 -----

OCTOBER

- | | <u>DATE</u> | <u>TIME</u> |
|---|--------------------|-----------------------|
| ▪ Workplace Campaigns continue | month of Oct. | ----- |
| ▪ Residential data entry/cleanup | Oct. 1 – 24 | ----- |
| ▪ LE meetings | Oct. 9 & 23 | 8:00 a.m. – 9:00 a.m. |
| ▪ Campaign Cabinet meeting (4 th Tuesday, monthly) | Oct. 28 | 3:15 – 5:00 p.m. |
| ▪ Individual meetings w/Residential Campaign Cabinet members
(<i>instead of collective orientation to explain process</i>) | Oct. 20, 21 & 22 | By appointment |
| ▪ Arrangements for Thermometers | Oct. 23 & 24 | ----- |

NOVEMBER

- | | <u>DATE</u> | <u>TIME</u> |
|---|--------------------|-----------------------|
| ▪ AdT member agency tours (personal w/Chair & ask) | TBD | TBD |
| ▪ Leadership Investment member agency tours/personal mtgs | TBD | TBD |
| ▪ LE meetings | Nov. 6 & 20 | 8:00 a.m. – 9:00 a.m. |
| ▪ Direct mail solicitation continues
(Residential round 1) | Nov. 3 – 26 | ----- |
| ▪ AdT Opening Event (COSTA d'ESTE) | Nov. 11 | 5:30 p.m. |
| ▪ Campaign Kickoff (dated confirmed) | Nov. 13 | 5:30 p.m. |
| ▪ Torchbearer Thermometers installed | week of Nov. 17 | (after Kickoff) |
| ▪ Campaign Cabinet meeting (4 th Tuesday, monthly) | Nov. 25 | 3:15 – 5:00 p.m. |

DECEMBER

- | | <u>DATE</u> | <u>TIME</u> |
|---|--------------------|-----------------------|
| ▪ Workplace Campaigns wrap | month of Dec. | ----- |
| ▪ Loaned Executive Thank you cards | month of Dec. | ----- |
| ▪ LE meetings | Dec. 4 & (18?) | 8:00 a.m. – 9:00 a.m. |
| ▪ AdT Holiday Card & UWA National Directory mailing | Dec. 4 & 5 | ----- |
| ▪ Holiday Fruit Sale fundraiser | Dec. 6 | 8:00 a.m.- 1:00 p.m. |
| ▪ Corporate gift follow-up mailing | Dec. 8 & 9 | ----- |
| ▪ Year-End analysis & special mailing | Dec. 8 –10 | ----- |
| ▪ 3 rd Quarterly vignette mailing | Dec.11 & 12 | ----- |
| ▪ AdT Agency Tours (personal w/Chair & ask) | TBD | TBD |
| ▪ Leadership Investment member agency tours/personal mtgs | TBD | TBD |

JANUARY

- | | <u>DATE</u> | <u>TIME</u> |
|---|--------------------|--------------------|
| ▪ Annual Report & Leadership Directory mailing | month of January | ----- |
| ▪ AdT Agency Tours (personal w/Chair & ask) | TBD | TBD |
| ▪ Leadership Investment member agency tours/personal mtgs | TBD | TBD |
| ▪ Direct mail solicitation continues
(Residential round 2, bus/prof round 2) | Jan. 5-30 | ----- |
| ▪ Campaign Cabinet meeting (4 th Tuesday, monthly) | Jan. 27 | 3:15 – 5:00 p.m. |
| ▪ Loaned Executive Recognition luncheon | Jan. 23 | 12:00 p.m. |

FEBRUARY

- | | <u>DATE</u> | <u>TIME</u> |
|---|--------------------|------------------------|
| ▪ AdT Luncheon – agency feature at UWC | Feb. 3 | 12:00 p.m. – 1:30 p.m. |
| ▪ Direct mail solicitation FINAL CALL
(professionals & Residential round 3; card value only) | Feb. 9-13 | ----- |
| ▪ Citrus Golf Tournament fundraiser | Feb. 21 | 7:00 a.m. – 3:00 p.m. |
| ▪ Leadership Investment Association event (member & prospects) | Feb. 19 | 5:30 p.m. |
| ▪ Campaign Cabinet meeting (4 th Tuesday)
<i>*phone bank assignments</i> | Feb. 24 | 3:15 – 5:00 p.m. |
| ▪ PHONE BANK (as needed) | Feb. 25-March 4 | all day |

MARCH

	DATE	TIME
▪ Loaned Executive program participant thank you letters (to main contacts of participating companies, cc: LE)	month of March	-----
▪ Workplace Campaign Performance & thank you letters (to main contacts with tracking stats)	month of March	-----
▪ Victory and Thank you Celebration (date confirmed)	March 9	5:30 p.m.
▪ Thank you AD in the Press Journal	March 14	-----
▪ Workplace Thank You Blitz (top 10)	March 16 – 27	-----
▪ Campaign Cabinet debrief sessions	March 23 & 24	all day
▪ Thank You postcard mailing	March 26 & 27	-----
▪ 4 th Quarterly vignette mailing	March 30 & 31	-----

APRIL

	DATE	TIME
▪ AdT event – Private Recognition Event (tentative sunset cruise idea)	April 8 (or sooner?)	TBD
▪ Leadership Event – private thank you celebration	April 2 (if no 2/19?)	TBD
▪ Torchbearer Thermometer tear down	April 13 - 17	-----