

**United Way Worldwide
High Performance Campaign Practice
Mid-Campaign Review**

Meeting Discussion Guide

For **account managers**, consider what could influence achievement of the account's Campaign goal:

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- How many pledges and gifts have been processed to date? How does that compare to this point in time last year?
 - What campaign strategies and tactics did you plan to use in this campaign? Which tactics were implemented? What impact did they have on the results so far?
 - What action items have taken place to close out the campaign? How are we following up with donors who haven't contributed yet this year?
 - What is the CEO's involvement in the Campaign?
 - Who is the Senior/Executive Sponsor and are they a leadership/major giver? Are there internal champions/ambassadors driving peer-to-peer giving?
 - What is the position/department of the Campaign Coordinator? Are they new to the role? How much interaction have we had with them?
 - Has there been an acquisition or merger associated with the account or other environmental conditions that have influenced the Campaign?
 - Are there opportunities to conduct special events or one time asks to bolster revenue?
 - Are there Leadership or Tocqueville givers who have the potential to give more and/or who have relationships that could help drive revenue?
 - Is the business culture conducive to the Campaign?
 - Are there internal corporate policies that are a barrier to increasing revenue?
 - Are there other barriers to meeting the projected goal?
 - What roles could the CEO, Board members, VP, other staff, and other volunteers play in addressing these barriers?

For **staff leadership**, consider if any **United Way operational issues** are standing in the way of achievement of the Campaign goal:

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- Integration of leadership/major gifts with workplace
 - Frequency of communications/relationship management touchpoints
 - Availability of data
 - Staff ability to use data, engage the CEO in a "discovery" process, or develop reciprocal agreements with companies
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