CAPITAL CAMPAIGN IMPLEMENTATION CALENDAR

WEEK 1						
Day 1: **Mail an appeal letter to members. (Appendix ___).** *Established co-ops may send two versions (1) one to targeted list promising follow-up phone call ; and a second to all other members that just asks people to respond. Startups call everybody. Letters should be hand-addressed.* ***Ready for launch of communications plan*** *(regular email, daily social media, challenges, promotions, events).*	**Day 2:** **Hold caller training.** *Distribute calling lists (Appendix ___), a suggested calling script (Appendix ___), and Frequently Asked Questions (Appendix ___). Include communicator, closer, large investor connector, and board members in training.*	**Day 3:** **Test monitoring and reporting systems**: **(a) Public progress meter** *(e.g., "fill the carrot-o-meter"; online via website, Facebook, Instagram; also in-store for existing co-ops)* **(b) System for collecting and following up with interested people**. *Store staff and/or volunteers are trained to collect and report names to coordinator or communicator* **(c) Daily Monitoring Report (DMR***) to evaluate calling progress (Appendix ___)*	**Day 4:** **Begin calls**, *ideally with group calling party. After 7-10 calls, stop and assess results & feedback and determine any strategy adjustments.* **Callers submit initial call results to coordinator,** *who compiles and tracks overall outcomes via DMR*. **Implement system for thank-you notes and acknowledgements** *to reinforce verbal commitments/pledges.*	**Day 5:** **Calls continue.** *Rigorously monitor progress through the DMR.* **Carefully track distribution of Member Investment Packet** *(see Appendix ___) to those who request more info. Send out packets daily.* **Begin large investor outreach.** **Get ready for roll out of matching challenges** *(or other investment incentives) for week 2 and beyond.*	**Day 6:** **Calls continue.** *Ongoing update and evaluation through DMR.* **Hold second calling party** *and other team-building & encouragement activities.* **Begin collection/closing process**. *Follow up with all who have received disclosure materials and/or committed to investing. Goal: Collect on commitments ASAP, and within 30 days at the latest.*	**Day 7:** **Calls continue**. *Assess progress via DMR: Are you at 35% of goal*? **Draft second appeal letter** *if campaign is slow or otherwise seems needed; circulate for review. 2nd letter will focus on progress, thanks, emphasis on goal/timeline.* **Work communications plan.** *Continue group email every 2-3 days and daily social media updates*. **Organize team meeting** *(for day 11.)*
WEEK 2						
Day 8: **Calls continue**. **Update and share results from DMR.** **Revise 2nd appeal letter.** *Prepare for hand addressing & mailing.* **Evaluate progress of large investor campaign roll-out.**	**Day 9:** **Calls continue.** *Calling party.* **DMR update.** *Evaluate caller performance to determine if people are on track to achieve goals; replace callers if needed.* **Print 2nd appeal letter and prepare mailing.** **Continue working communications plan:** *Announce weekly challenge, if any.*	**Day 10:** **Calls continue.** **DMR update.** **Mail 2nd letter.**	**Day 11:** **Calls continue.** **DMR update**. *Are you at 35-50% of total goal? If not, reassess and refine strategy.* **Team Meeting**. *Check in on morale, celebrate progress, strategize for next phase, have fun!* **Plan for Week 3 challenge / incentive**.	**Day 12:** **Calls continue.** *Calling party.* **DMR update**. **Large Investor campaign in fully swing.**	**Day 13:** **Calls continue.** **DMR update.** **Email push to meet weekly challenge.**	**Day 14:** **Calls continue.** *Calling party.* **DMR update.** **Organize team meeting** *(for day 18)* **Work communications plan.** *Group emails will increase frequency to daily over the coming week; daily social media updates on progress continue.*