quick tips

make your pledge first

IF YOUR CO-WORKERS KNOW THAT YOU HAVE ALREADY PLEDGED YOUR SUPPORT, THEY ARE MORE LIKELY TO GIVE. Be prepared to share your story about why you support the campaign, or how a charity has benefited you or someone that you know.

know the facts

THOROUGHLY REVIEW THE MATERIALS AND WEBSITES. This will help you feel more comfortable when you tell the story. Make personal contact: People give to people. It's important that every campaign volunteer reaches out to their assigned employees one-on-one.

be positive

EXPLAIN THE BENEFITS OF CHARITABLE GIVING. Stress the importance of each person's contribution. None of us can do it alone. Every gift makes a difference!

ask co-workers you know

APPROACHING PEOPLE YOU KNOW FIRST is helpful as you refine your "ask". Positive responses will help to improve your presentation and boost your confidence regarding your presentation skills.

make it a two-way street

THE ASK SHOULD BE A DIALOGUE, NOT A MONOLOGUE. Be prepared for questions and comments. If you don't know the answer to a question, that's okay! Say you are unsure but will find out — then circle back with the answer when you obtain one. Be sure to listen with care and sensitivity to any concerns that come your way.

what is your thing?

CONNECT THE DOTS BETWEEN A DONOR'S INTERESTS AND THE CAMPAIGN'S WORK. Part of your dialogue should include asking potential donor about their interests.

say thank you

Whether your co-workers indicate that they intend to make a gift or not, thank them sincerely for their consideration and time. **YOU CAN NEVER SAY THANK YOU ENOUGH!**

campaign timeline checklist

Together We Care

secctexas.org

pre-campaign:

- ❑ Campaign Committee chairperson is named
- ❑ Top management and committee chairperson identify committee members *(campaign team members, Leadership Giving chair, volunteers,etc.)*
- ❑ Attend training
- ❑ Develop campaign strategy
- ❑ Set campaign goal
- ❑ Leadership Giving campaign strategy developed, prospects identified, events scheduled
- ❑ Develop internal training schedule for volunteers/coordinators
- ❑ Identify department/division/campus coordinators at a ratio of 1:25
- ❑ Hold a coordinator training, or volunteer meeting, to discuss campaign plans
- ❑ Distribute campaign materials to coordinators
- ❑ Conduct Leadership Giving campaign two weeks prior to the general campaign kickoff

during the campaign:

- ❑ Campaign kickoff event
- ❑ Host employee education meetings
  - *Utilize campaign coordinators and team leaders to conduct meetings for different areas within your organization*
  - *Distribute pledge forms and campaign materials during meetings*
  - *Present facts about the campaign*
  - *Schedule charity speakers to make presentations*
  - *MAKE THE ASK!*
  - *Collect pledge forms and give a deadline for those who wish to discuss giving with their families*
- ❑ Get employees excited about the campaign
  - *Put up campaign flyers and posters*
  - *Promote the campaign goal and advertise progress*
  - *Conduct department/division/campus events to raise awareness and increase participation*
- ❑ Follow-up with all employees to ensure 100 percent contact

post-campaign:

- ❑ General campaign celebration
- ❑ Leadership Givers thank you event
- ❑ Volunteer appreciation letter/event
- ❑ Distribute incentive/recognition items
- ❑ Tabulate results
- ❑ Evaluate your organization's performance and determine campaign strengths and areas for improvement
- ❑ Make campaign recommendations for next year's lead campaign coordinator
- ❑ Ensure all payroll deduction copies of the pledge form have been sent to the payroll office
- ❑ Post/announce final campaign results and thank donors

secctexas.org

You are one of the most important people in this year's fundraising effort. As a campaign coordinator, you are **the "go to" person** for educating, motivating, and inspiring your fellow employees.

THANK YOU for going above-and-beyond on behalf of others ... and welcome to an exciting year of **making a real difference,** in your workplace and our community!

{one GIFT at a time}

I am Texas strong

secctexas.org

campaign coordinator guide

Together We Care

secctexas.org

10 steps to a successful campaign

While each campaign is unique, these 10 steps are the building blocks for an effective campaign and should be followed as closely as possible. Your campaign staff will help you to develop a plan that works best for your organization.

campaign tools:

- SPEAKERS, CHARITY TOURS, CHARITY FAIRS
- INTERNAL NEWSLETTERS WITH CAMPAIGN / CHARITY SUCCESS STORIES
- CAMPAIGN VIDEO
- CAMPAIGN MATERIALS
- CAMPAIGN WEBSITE
- CAMPAIGN STAFF / TEAM

strategies that work:

- CREATE PRE-CAMPAIGN COMMUNICATION
- HOLD A KICKOFF EVENT
- USE GROUP PRESENTATIONS
- CONTACT EVERY INDIVIDUAL PERSONALLY
- KEEP THE CAMPAIGN AS SHORT AS POSSIBLE
- ENCOURAGE PAYROLL DEDUCTION
- PROMOTE A TEAM EFFORT
- MAKE THE ASK
- SAY "THANK YOU!"

sample presentation:

(with suggested timeframe, in minutes)

- WELCOME AND REMARKS BY COORDINATOR (3)
- REMARKS BY TOP MANAGEMENT, OR SENIOR LEADER AND LABOR REPRESENTATIVE (3–5)
- INTRODUCE GUEST SPEAKER(S) (1)
- GUEST SPEAKER PRESENTATION (5–10)
- PRESENT CAMPAIGN INFORMATION: GOAL, EVENTS, CONTESTS, ETC. (5)
- SHOW CAMPAIGN VIDEO, IF APPLICABLE (5–7)
- SAY "THANK YOU!"

1 DEVELOP A PLAN

By looking at where you have been, you can better determine where you are going. Analyzing past campaigns will help reveal areas of opportunity and provide clues for improvement.

To build a solid campaign plan you'll need to…

- *Review your organization's giving history and analyze campaign data*
- *Establish a campaign timeline (campaign committee meeting dates, trainings, leadership giving campaign dates, campaign kickoff, employee meetings and special events)*
- *Implement strategies to meet your campaign goals*

2 ESTABLISH SUPPORT FROM THE TOP

The success of your campaign depends on the commitment and involvement of your top management and senior leadership. Keep them informed of the campaign progress.

Work with your top management to…

- *Set up a CEO call with campaign staff*
- *Help determine campaign goals and objectives*
- *Endorse the campaign*
- *Appoint a campaign steering committee that includes a campaign chairperson and a Leadership Giving chair*
- *Attend campaign events*
- *Conduct a Leadership Giving campaign among top management or those with the capacity to give at the leadership level*
- *Provide thank you recognition to volunteers and donors*

3 SET YOUR CAMPAIGN GOAL

Establishing a target serves as a motivator to achieve better results.

Your campaign goal should be…

- *Based on past campaign results*
- *Realistic yet challenging*
- *Set for both dollars raised and percent participation*

4 RECRUIT & TRAIN CAMPAIGN COMMITTEE / COORDINATORS

The campaign committee and coordinators will organize efforts to educate fellow employees about the campaign. They build excitement for the campaign, answer questions and ensure that everyone is asked to give.

To get the most from your volunteers…

- *Seek out employees with various skill sets that represent departments throughout the organization*
- *Find employees who support the campaign to serve on the committee and as coordinators*
- *Recruit one coordinator for every 25 to 30 employees*

The Campaign Committee needs to…

- *Attend a training facilitated by campaign staff*
- *Assist in all stages of campaign planning*
- *Have specifically-assigned roles*
- *Review the prior campaign plans and share new ideas*

5 RUN A LEADERSHIP GIVING CAMPAIGN

Leadership gifts of $1,000 or more are the organization's best opportunity for increasing average gift and campaign growth. An employee campaign that strongly encourages leadership giving is likely to be a successful campaign. Peer-to-peer solicitation and personal asks are critical to the successful cultivation of leadership gifts.

How to make it a success…

- *Appoint a Leadership Giving chairperson to organize the leadership giving campaign*
- *Work with campaign staff to compile a Leadership Giving prospect list*
- *Host a Leadership Giving campaign among your organization's management prior to the overall campaign kickoff*
- *Conduct additional Leadership Giving events throughout the campaign*
- *Personally ask current givers to consider increasing their gift or commit to maintaining their level of giving*

6 PROMOTE & PUBLICIZE

Education and information are keys to reaching your campaign goals. Create an atmosphere of enthusiasm as you inform employees about how their contributions improve lives in our community.

Successful promo strategies include…

- *Employee testimonials, campaign facts and articles (distributed via print, email or video)*
- *Endorsement letters from top management and labor leaders*
- *Kickoff rallies and contests*
- *Large and small group meetings (consider including speakers from participating charities)*
- *Posters and banners*
- *Displays that include campaign posters and banners*
- *Incentives for turning in pledge forms*
- *Campaign brochures and pledge forms*

7 EDUCATE EMPLOYEES & MAKE THE ASK

This is by far the most important step. The major reason people do not give is because they were never asked, so ask everyone! Giving is a personal decision — but please be sure to allow everyone the opportunity to contribute.

- *Provide coordinators with a list of employees they are responsible for soliciting*
- *Educate through employee meetings within department / division workgroups*
- *Invite every employee*
- *Follow up with one-on-one communication*

Your meeting should include…

- *Campaign staff*
- *A charity speaker or employee that connects with the message of the campaign*
- *Promotion of payroll deduction*
- *An opportunity to address donor concerns*

8 REPORT YOUR RESULTS

Regular reporting allows the team to monitor the progress of the campaign, while keeping you from having to hold cash, checks and pledge forms.

- *Develop and communicate a plan for coordinators to return pledge forms weekly*
- *Ensure the pledge forms are filled out completely, signed and that the math is accurate*
- *Provide weekly progress reports to organizational leadership and campaign staff*
- *Ensure report envelope totals are accurate*
- *Report the final campaign total to the entire organization*

9 SAY THANK YOU

The importance of thanking everyone who helped you to accomplish your goals cannot be over-emphasized.

- *Send personal thank you cards (or eNotes) to the campaign team*
- *Have top management send an organization-wide thank you and acknowledgement*
- *Have the campaign chairperson host a final thank you event for campaign volunteers and leadership givers*

10 EVALUATE RESULTS & PLAN FOR NEXT YEAR

Be sure to keep the momentum of your campaign and learn from your experience to improve future campaigns.

- *Hold a debriefing session to evaluate your campaign's plan and results with the campaign committee and coordinators*
- *Solicit feedback on the campaign from top management*
- *Identify next year's lead campaign coordinator*
- *Establish a timeline for next year's campaign planning*