



*Best Practices*



# Step #1

## Get Started

- Learn Importance of CFC
- Review CFC Materials
- Meet with the CFC staff or CFC Specialist Who Will ...
  - ✓ Help develop campaign strategies
  - ✓ Help establish a goal
  - ✓ Assist in the creation of a campaign plan
  - ✓ Provide campaign supplies/materials
  - ✓ Arrange a charity speaker to attend your CFC Rally (if applicable)



# Step #2

## Get Agency Head Support

- Your Agency's Enthusiasm Can Be Contagious
- Ask Your Agency Head To:
  - ✓ Appoint next year's Employee Campaign Manager (ECM) to work with you
  - ✓ Attend events and write a personal letter or email message for support to all employees
  - ✓ Establish agency goal for participation & pledges
  - ✓ Do something unusual to encourage participation
    - Examples: walk around the office with a crazy hat and a sandwich board advertising CFC



## Step #2 (cont)

- Secure Support From Your Agency Head For:
  - ✓ Time for training and time for your committee to plan and implement your agency's campaign
  - ✓ Time for face-to-face meetings with employees
  - ✓ Incentives and your management team's support to reach your campaign goals



# Step #3

## Recruit a Team

It's Easier &  
More Fun  
Involving Others!



**TEAMWORK**

BECAUSE WE SOMETIMES MAY NEED A HAND



## Step #3 (cont)

- Don't Do It Alone
  - ✓ Recruit enthusiastic employees to serve on your CFC committee
  - ✓ Assign each committee member to work on a portion of the campaign:
    - Advertisement/Marketing
    - Employee Pledge Activities
    - Fundraisers
    - Thank You & Wrap-Up
  - ✓ Recruit and educate “keyworkers” from various departments to help with employee pledge meetings, fundraisers and other campaign activities
    - Recommendation 1 keyworker for every 30-50 employees



# Step #4

## Set Campaign Goals

- Why Set Realistic Campaign Goals?
  - ✓ Creates motivation
  - ✓ Encourages participation
  - ✓ Helps establish campaign plan
- Talk With Last Years ECM
  - ✓ What worked?
  - ✓ What didn't work?
- Complete An Employee Survey



## Step #4 (cont)

- Look at Past Results ... .Keep In Mind:
  - ✓ The number of contributors
  - ✓ The total amount raised
  - ✓ The participation rate
  - ✓ Changes in the employee base since last year
- Based on What You Find, Consider Setting Goals For:
  - ✓ Total campaign dollars to raise
  - ✓ Percent of employee participation
  - ✓ Average gift
- Set Goals With Committee Members, Agency Head & Management Team
- Communicate and Measure Set Goals – Thermometer?



## Step #5

### Develop Strategies to Reach Goals

- Increase Participation & Average Gift
  - ✓ “Take a Step” strategy
    - Ask employees to increase their gift by a small amount
      - Example #1: from \$5 to \$6 or \$20 to \$22 per pay period
      - Example #2: 10% increase: \$5 to \$5.50 per pay period
  - ✓ Give examples of combined impact of small increase – every dollar and every gift matters



## Step #5 (cont)

- Incentives & Door Prizes for
  - ✓ First-time givers and employees increasing their gifts
  - ✓ “One Hour of Pay” per month or pay period or “suggested gift” based on grade/salary levels
  - ✓ Early bird pledges
  - ✓ Turning in pledge form the day of a meeting or by a certain date
  - ✓ Encourages participation
  - ✓ Helps establish campaign plan



## Step #5 (cont)

- Competition between departments or other Federal agencies:
  - ✓ Increase in participation
  - ✓ Increase in average gift
  - ✓ Increase for total amount collected
  - ✓ Increase in online pledges
- Incentive Ideas (time off is most popular)
  - ✓ Angel Day – day off for one hour of pay a month pledged
  - ✓ Week of 1/2-hour “leave early”, “sleep in” or “longer lunch” passes
  - ✓ Casual Day
  - ✓ Agency logo items, movie tickets, concert tickets, restaurant or other gift certificates



## Step #6

### Communicate & Educate Employees

- Conduct training for your committee members and keyworkers
- Schedule charity tours
- Use your Intranet, voice mail, email and other in-house communication tools to build awareness about
  - ✓ CFC
  - ✓ Needs in our community
  - ✓ Promote campaign (during and after)



## Step #6 (cont)

- Plan a Campaign Kick-Off event/Charity Fair
- Distribute Agency Head endorsement letters; tell your story or ask a coworker to tell theirs
- Use CFC posters, brochures, postcards and other campaign materials to educate employees
- Conduct an Online Giving seminar and/or set times you are available in a computer room to help employees make their gift
- Visit the CFC website ([www.desertswcfc.org](http://www.desertswcfc.org)) for more information and campaign poster templates
- Increase employee awareness by creating competition between departments
- Conduct various fundraising events to increase awareness



# Step #6 (cont)

## Guerrilla Marketing Tactics

- Unexpected & Unconventional Methods
  - Place posters and flyers in unusual places (inside restroom stall doors, on cafeteria tables, car windshields, office doorknobs, stairwells, etc.)
  - Engage Agency head or executive staff to advertise in unusual ways
  - Put a cookie in a baggie and staple it on a flyer for everyone

## In-House Resources

- Intranet
- Voice Mail
- Electronic bulletin boards
- Intercom announcements
- Contact agency's communications/public relations office for ideas & help



# Step #7

## 100% Ask

***#1 reason people do not give is because they were not asked!***

- 5-Foot Rule - ASK EVERYONE that comes within 5 feet of you
- Not everyone will choose to give; however, *no one will give unless they are asked*
- Make a gift yourself – it's easier to say "Join Me"
- Ask committee members and Keyworkers to give first
- Use keyworkers to help schedule employees for meetings and track those who have been asked



## Step #7 (cont)

- Utilize the “100% Ask” tracking form in the ECM handbook/disc
- 
- Make sure all employees are accounted for by using incentives for returning pledge forms – whether they give or not
- Conduct pledge drive before fundraisers
- Conduct peer-to-peer asks or group meetings using 10 minutes at the end of already scheduled meeting



# Step #7 (cont)

- Engage someone
- Lead with emotion ... follow with facts
- Treat potential donors like investors
  - ✓ Show impact their money can make
  - ✓ Give success stories
  - ✓ Thank them for considering pledging
- Celebrate donors
- Demonstrate effectiveness and personalizing work of a charity
  - Tell your personal story
  - Find someone in the agency to tell their story



## Step #7 (cont)

- Doing good is contagious
- Make people feel they are part of something positive
- Develop a listening ear
- Keep donors coming back ... year after year
  - #1 reason donors stop their support?
    - ✓ way they were treated
    - ✓ lack of gratitude
    - ✓ no clear understanding on how their gift helped



# Step #7 (cont)

## Emphasize

- Choice
  - ✓ Donors direct pledges to the organizations that are closest to their interest
- Convenience
  - ✓ Payroll deduction allows people to give more, while only having a small amount deducted from each paycheck
  - ✓ Giving online offers the added advantage of a simple & convenient way to pledge
- Confidence
  - ✓ All charities are screened by federal peers based on specific criteria
  - ✓ Pledge is sent directly to the charities donors choose (minus campaign expenses)
  - ✓ Managing organization completes annual audit to insure accuracy and accountability in processing pledges



# Step #7 (cont)

- Have a great photo of a person (or animal) and a few words that convey the emotional heart of your campaign
- Make the “Ask” as tangible as possible
  - ✓ Use materials available online regarding what “\$X” provides
- Include a tickler, thermometer, quote or comment(s) that show other donors taking action
  - ✓ Post thermometer posters in places of high visibility (like intranet, elevators, etc.) that show how the campaign is progressing
- Give a sense of urgency with a deadline or a goal. Inspire people to act now
  - ✓ Set dates for your campaign. Post the deadline and send out reminders to donate before it is too late
- Make sure your call to action is clear and easy to act upon
  - ✓ Announce the kick-off of the campaign, what the agency goal is and how employees can donate
  - ✓ Send employees links to this year’s campaign video
  - ✓ Remind employees that no gift is too small
- Remember to say **THANK YOU!!**



# Step #7 (cont)

## Group Presentations

- Can be done in conjunction with regular staff meetings
- ECMs utilize the video and an agency guest speaker to share the CFC story
- At the conclusion of the presentation, ECMs ask attendees to support the campaign
- The majority of participants will turn in their pledge card before they leave



## Step #7 (cont)

- **Group Presentations Advantages**
  - Donors don't feel singled out
  - ECMs feel more comfortable asking for donations
  - It is the most efficient use of the ECM's time during the campaign



# Step #8

## Report Results

- Reporting results regularly lets you know when you exceeded goal
- Regular reports keeps momentum going!
- Weekly partial reports & pledge turn-in helps CFC to cash personal checks in a timely fashion
- Forward copies of payroll forms to your agency's payroll department
- Summarize all campaign information on the ECM Report Envelope



## Step #8 (cont)

- Contact your CFC Specialist weekly when your pledge forms and ECM Report Envelope is ready for pick up
- Provide your CFC Specialist with a list of thank you gifts to be delivered at the next pick up
- Critique and document campaign
- Communicate results to your Agency Head, committee and all employees



# Step #9

## Thank Everyone!

- Hold an agency-wide thank you event/celebration
- Thank you event can be held in conjunction with a staff meeting
- Thank all donors and volunteers personally throughout the campaign when you pick up pledge forms & deliver thank you gifts
- Create a thank you letter from the Agency Head to all the volunteers
- Celebrate with committee and volunteers – recruit for next year!
- Based on Federal Regulations: 1) donors cannot be recognized for pledging publicly; and 2) supervisors cannot be notified as to whom pledged



QUESTIONS???