GETTING STARTED
Target Completion Date

☐ Meet with SEFA Staff/Loaned Associate
   - They will help you with your campaign from start to finish

☐ Review Last Year’s Campaign
   - Talk with last year’s campaign coordinator about strengths and weaknesses
   - Meet with SEFA staff and your Loaned Associate to analyze previous results and develop this year’s plan

☐ Set Goal Based on Your Review
   - Percent of participation; dollars raised; amount of average gift; amount of per capita gift

☐ Involve Your Agency Director
   - Director fulfills a leadership role
   - Director can support the campaign with an endorsement letter
   - Director can personally solicit key managers/directors
   - Invite Director to attend key campaign meetings
   - Report campaign progress to your Director

☐ Recruit Your Campaign Committee. Don’t try to do it alone; a committee serves to spread responsibility, and increase communications, participation and involvement
   - Ask last year’s coordinator for committee member suggestions
   - Involve your union and/or management
   - Look for diverse talent among peer leaders
   - Work with SEFA staff/LA to arrange for committee members to visit a SEFA agency.
   - Delegate responsibilities to each committee member
   - Recruit your fundraisers carefully. Choose energetic and enthusiastic people from all levels within your organization
   - Develop a campaign timetable

☐ Train All Committee Members During the Regular Workday
   - Be sure each committee member/fundraiser has a copy of the timetables and that it is reviewed at each committee meeting

☐ Conduct an Employee Survey
   - Survey employees to determine how many SEFA agencies they or members of their families have used

☐ Develop Your Reporting Deadlines
   - Schedule reporting deadlines according to SEFA’s campaign meeting
DEVELOP PLANS TO RUN AN EMPLOYEE CAMPAIGN

Target Completion Date

☐ Meet with SEFA Staff/Loaned Associate
   • Develop plans to run a Quality Employee Campaign

☐ Set Strategies. Work on high potential areas, i.e., participation, current givers, payroll deduction, etc.

☐ Develop Plan and Calendar for Publicizing Your Campaign
   • Use poster and display materials – available from SEFA staff/Loaned Associate
   • Publicize SEFA campaign in agency publication
     ○ Highlight Committee Members
     ○ Interview employees that are agency volunteers
     ○ Interview employees that have utilized SEFA services
     ○ Show people where last years dollars went

☐ Order Supplies
   • Campaign supplies such as pledge cards, campaign brochures, posters and fundraiser training materials are available free through SEFA staff/LA

☐ Agency Director and/or Union President Letter of Endorsement
   • Send out letter of endorsements to all employees prior to kickoff

Personalize Pledge Cards
   • Every pledge card should be personalized with each employee’s name. Check with your MIS staff or United Way of New York State for assistance

☐ Organize a Separate Solicitation of Management/Directors
   • Run management/directors campaign meeting before the kickoff and report the results. Agency director should host this meeting. Special invites from director
     • Utilize guest speaker
     • Show film
     • Report leadership givers ($250 or more)

☐ Select Methods of Fundraising
   • Utilize group presentations and one-on-one solicitation
   • Schedule group meetings during the work hours

☐ Recruit and Train Fundraisers
   • Ideally, recruit one fundraiser per ten employees
   • Fundraisers should be:
     ○ supportive of SEFA, both conceptually & financially
     ○ respected by peer group
     ○ enthusiastic personalities
     ○ available and willing to do the job
     ○ willing to attend training
Recruit and Train Fundraisers (continued)
- Train both new and experienced fundraisers with assistance from SEFA staff/LA
- Give each fundraiser a copy of Fundraisers Job description
- Take fundraisers on agency tours. Tours can be arranged through SEFA Staff/LA

Conduct a Retiree Campaign
- Recruit a prominent and well-respected retiree to head up the retiree campaign for a one-time cash or check contribution

Track Campaign Progress Toward Goal
- Everyone should return a pledge card
- Follow-up with those who do not return a card
- Compare results with past year
- Use thermometer to inform employees about progress toward goal

SUCCESS TIP: Get the most mileage from your employee tour by using it as a focal point for SEFA publicity. Take a camera along and take photos and write a story for your publication. Also, ask employees who participate to share their experience at an employee meeting.