

Quality Campaign Checklist

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 years 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
- 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.