

# OPTIMUM SEFA CAMPAIGN PLAN

The following “Steps to Success” have proven to be useful guidelines for campaign coordinators

## I. Involve Your Commissioner/Agency Head

Perhaps the most important element to the success of your campaign will be the support and interest of your Commissioner/Agency Head. Present your campaign plan with time-lines, events, incentives and rallies to your CEO. Seek his/her endorsement of, or involvement in, the following campaign steps:

- A letter from him/her to all employees endorsing the campaign
- Goal setting
- Authorization of personalized pledge cards
- Arrangement of advance management solicitation
- Approval for agency time to plan your campaign, hold an employee campaign rally and conduct a solicitation program.

## II. Plan

Careful planning is crucial to the success of any campaign. In addition, a plan will make your job easier, enjoyable and energetic!

- Analyze last year’s campaign
- Talk with your department/agency’s previous coordinator
- Find those spots in your department/agency’s campaign that need attention or may have room for improvement
- Review past records (last 5 years) – number of employees – total amount pledged – number of contributions – number of employees using payroll vs. cash contributions
- Develop a campaign plan that will:
  - Establish a goal
  - Increase employee understanding of SEFA
  - Promote good feelings about the campaign
  - Promote payroll deduction as the best way to give (payroll giving yields 8 to 10 times more than cash)
- Talk about the good feelings we all have when we give a gift of:
  - \$1.00, \$2.00, \$5.00 and \$10.00 per pay (See “What your dollars will buy” section)

### III. Organize

Depending upon the size of your department/agency, this is a big job! Get help! Here's how:

- Call upon the local United Way and/or your Loaned Associate. They are there to help you plan and execute your campaign.
- Set up Campaign Committee and share responsibilities for major campaign tasks like publicity, training, pledge card control, special events, etc. Recruit one or two committee members per 50 employees.
- Make sure the committee is a representative of all segments of the agency:
  - management
  - organized labor
  - special talent staff
- Have committee members attend an employee campaign manager training program. The sessions are designed to provide:
  - answers to questions or concerns
  - information about the agencies/programs that benefit from the campaign
  - information about the fundraising process
- Order campaign supplies and materials:
  - Film/video
  - SEFA brochure (1 per employee)
  - Pledge cards (1 per employee) Allow enough time to personalize the employee pledge cards
  - Posters
  - Report envelopes
  - Incentives

### IV. Promote

Publicizing your campaign can build excitement among your employees. Sharing the purpose of the campaign and the good your personal contributions do every day of the year will help ensure a successful campaign.

- Hold an employee Campaign Kickoff.
- Display the wide variety of SEFA promotional materials.
- Arrange for a presentation through the loaned associate or local UW "What a way to learn about recipient agencies first hand!".
- Use employee publications for feature stories and photos about the campaign and the individuals who benefit from the programs and services.
- Arrange for agency tours.
- Distribute an endorsement letter from your Commissioner/Agency Head/Union Leadership.

## V. Kickoff and Campaign

Now we're down to business! Have an advance management solicitation before the general employee kickoff to show management's commitment to the campaign. Then, kickoff with an upbeat and fun event to generate interest and enthusiasm. 3 Start employee solicitations immediately after the kickoff rally in the following form.

- **Group Solicitation**
  - This is the best and quickest way to reach your employees. In less than 20 minutes you can present an agency speaker, show the campaign video and have the pledge cards filled out (pass out the cards at the beginning of your employee solicitation program and pick up all cards, even if they have not been filled out, at the end).
- **One-on-One Solicitation**
  - Is effective but requires more time. When meeting one-on-one explain SEFA, how it works, who benefits and how to complete the pledge card.

## VI. Follow-Up

Your hard work is ready to pay off! The key is to keep your department/agency's campaign moving.

- The campaign should be short (3 - 4 weeks at the most) and visible.
- Make sure every employee has been given the opportunity to give.
- Collect all pledge cards, even if the employee chooses not to give.
- Your Commissioner/Agency Head/Union Leaders, committee and employees should be updated about the progress of the campaign.

## VII. Say "Thanks" to Your Employees

Giving to SEFA makes people feel good about caring. It also makes them feel good when their generosity is acknowledged.

- Send a "thank you" letter from your Commissioner/Agency Head/Union Leaders to all contributors.
- Feature results/successes of the campaign in your employee publications. (Encourage your public relations department to print "year-round" communications. Let your employees know where their money goes.).
- Check with your Loaned Associate or local UW to find out about Certificates of Appreciation for committee members and volunteer fundraisers.