

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 3
 - respected by peer group
 - enthusiastic personalities
 - available and willing to do the job
 - willing to attend training

Recruit and Train Fundraisers (continued)

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- 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

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- 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

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- 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.