

# Intermountain CFC



## Campaign Coordinator Training Guide

[www.intermountaincfc.org](http://www.intermountaincfc.org)

# Seven steps to a successful campaign:

## Step One: Recruit Your Team

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- Select key people from various departments to assist you, making sure you have representation from both labor and management. Look for people who relate well to fellow employees, who already support the campaign, and who will participate enthusiastically.
- Recruit a co-coordinator: This person will then be ready to provide leadership next year.
- Know your CFC facts. Visit <http://www.intermountaincfc.org/AboutCFC/FAQs.aspx>
- Take your Keyworkers to an Intermountain CFC regional Kickoff event, if possible. See [www.intermountaincfc.org](http://www.intermountaincfc.org)

## Step Two: Develop a Plan

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- Become familiar with your agency's history of giving. Look for "Bright Spots" (divisions or groups of your agency that do particularly well or years when the CFC was more successful) and model your campaign accordingly. Talk to previous Campaign Coordinators to find out what works and what doesn't.
- Meet with your Loaned Executive or CFC Director to update you on present campaign procedures.
- Develop a campaign strategy and timetable.

## Step Three: Get Agency Management Support

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- Obtain your agency head's personal commitment and support. For best results you'll want him or her to:
  - Review past performance and endorse the goal.
  - Endorse the campaign personally at employee rallies.
  - Provide the time and resources for planning meetings, training, agency tours, and employee rallies.
  - Send a letter to management explaining your role as Campaign Coordinator.

## Step Four: Promote & Educate

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- Select one out of every 25 employees to ask others for their pledge. They are called Campaign Keyworkers.
- Arrange for Campaign Coordinator, Keyworker, or other training through your Loaned Executive or CFC Director.
- Feature information about the Campaign in newsletters, on bulletin boards, e-mail, web-site etc.
- Consider holding a creative special event as a way to include fun in fund raising! (See FUN(d)raising Ideas.)
- Motivate and inform employees by showing a video or inviting a motivational speaker to your events. It may be helpful for employees to tour agencies receiving campaign funds. All of the above can be arranged through your Loaned Executive.
- Write each employee's name on pledge cards.

## Step Five: Ask for the Pledge

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- Personally contact each employee. **THIS IS THE NO. 1 KEY TO SUCCESS!** Download “Making the Ask” and “Overcoming Objections” docs from [www.intermountaincfc.org](http://www.intermountaincfc.org) → Campaign Team → Coordinators & Loaned Executives. These documents will help you approach co-workers with confidence.
- Hold brief, lively and informative employee briefing sessions/promotions events.

### Planning Your Promotional Event

A promotional event can mean anything from a full scale kick-off to a quiet video showing with popcorn. The type of promotional event depends on the size of your organization, and what your agency will support. It doesn't have to be a grand affair. For example, serving beverages and popcorn, and showing the latest CFC video is simple and inexpensive, yet effective. The focus should be on the reason for having the event—raising funds for charities through Intermountain CFC.

**It helps to invite the charities to be part of your promotional event.** It gives employees the opportunity to talk directly to the charities involved, to ask questions and to find out how to support their communities along the lines of their individual interests. To arrange for the presence of charity representatives at your event, contact your Loaned Executive or CFC Director.

- Collect all pledge cards.
- Distribute donor recognition items.

## Step Six: Report Campaign Results

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- Periodically report results internally so that employees can see campaign progress.
- Complete the campaign report on a weekly basis. Send white copies to your payroll center. Send only yellow copies to Intermountain CFC in Ogden.
- Contact your Loaned Executive to report results and to determine your eligibility for a campaign award.
- Analyze campaign results to determine whether objectives were met. Produce a summary report for next year's Campaign Coordinator.

## Step Seven: Say “Thanks” Again & Again

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### People like to be appreciated & recognized!

- Recognize achievement internally, with e-mail, meetings, newsletters, etc.
- Publicly thank employees as a group. It shows appreciation for their commitment/caring & builds next year's momentum.
- Hold an awards ceremony. Ask managers & labor leaders to join. Salute Keyworkers and volunteers.
- Do post-campaign stories reporting how much was raised, the average amount donated per employee, and how the figures compare with previous years.
- Print a thank you letter or hang a sign in the lobby thanking employees for contributing.
- Insert payroll stuffers in all employees' paychecks announcing campaign results.

**Thank You for making a Difference!**

## Develop a Pledge Theme

### **The Big Shot**

As a variation on the standard thermometer graph to monitor agency progress, use a hypodermic-needle design. Great for hospital themes.

### **Raiders of the Lost Heart**

Using a heart thermometer, each department represents a piece of the heart. You have met your goal when the entire heart is filled in.

### **CFC Cookie Caper**

Each pledge card is passed out with a cookie and the slogan "CFC Cookie Caper-Help us bring in the dough."

### **Hawaiian Theme**

Each person turning in a pledge card gets a plastic lei. At campaign's end, hold a Hawaiian potluck where employees wear their leis and dress Hawaiian. Have a limbo contest. Use a palm tree thermometer.

### **Holidays**

Tying your campaign to a holiday (Labor Day, Halloween, etc.) is an easy way to make CFC relevant. Get them involved in a project such as a pumpkin carving contest or hold a Halloween costume contest.

### **1960s Theme**

Dress up the '60's garb. Sell headbands, smiley face pins, tie-dyed shirts.

### **Wild West Theme**

Employees dress in Western clothes. Use a cactus as your thermometer.

### **Counting on You**

Fundraisers featuring counting. Count the eye colors in the office. Count jelly beans in a jar. Pay to enter the counting contests, the winner gets a prize. Use Count Dracula's cape as a thermometer (great around Halloween).

### **Shoot for the Stars**

Be a star, give to CFC. Use a star as a thermometer.

### **Raisin' Money**

Use the California Raisins as a thermometer theme. Pass out boxes of raisins to people as they turn in pledge cards.

### **Exotic Locales**

Whether you transform your campaign into a Hawaiian luau, African safari or the Australian outback, employees are sure to have a wild time. Encourage staff and volunteers to dress the part of locals. Host a lunch with theme-related food. Organize a hula-hoop contest.

# The CFC Rally

An effective rally doesn't have to be complex, or long. Present people with enough information to want to support the campaign and to make informed decisions about giving. Be sure to ask for the pledge forms to be returned. One of the best formats for a CFC presentation is to tie in with a regular all-employee staff meeting or annual event.

## **Suggested Agenda for a CFC Employee Meeting/Rally:**

(Game, contest, event, entertainment).....	(Optional)
2 min: Welcome, Personal Endorsement, Remarks, Goal Remarks by Labor Officer (if applicable)	Manager
2 min: CFC Overview (brief history, schedule, structure)	Campaign Coordinator
5 min: CFC Video	CFC Staff/Loaned Executive
5-10 min: Presentation	Charity/Testimonial of someone who has been helped
5min: Questions and Answers	Campaign Coordinator or CFC Rep
2min: Ask for pledge, thank co-workers	Campaign Coordinator/Keyworker
(Game, contest, event, entertainment).....	(Optional)

Be sure to leave time for fun, food, games, and completion of pledge forms.

Collect completed pledge forms at the door                      Keyworker/volunteer

## **Campaign Coordinator Speech: #1 — Video Screening Remarks**

### Suggested Introduction

In the next few minutes our campaign video will show how the gifts you make through CFC make lives better for people throughout our community and the world.

You may wonder why the need seems to be so great year after year. Well, your support is critical year after year because so many people need help that only a perfect world can change. What's special about CFC is your ability to choose and support agencies you care about. CFC supported agencies are there every day, but only with your help. (Add testimonial, if applicable).

### Suggested Closing

As you see, the money you give through CFC can make a difference each minute, each day, each month – all year long – for so many lives. When you give through CFC, you improve the lives of people right here in our community and in our world, people who probably will never know you helped.

Make no mistake about it. Your contribution is critical to the success of the agencies that provide so many kinds of charitable services.

Please give generously. Payroll deduction is the easiest way to give as it spreads it out over the year.

Thank you.

## **Campaign Coordinator Speech: #2 — Basic**

One of the most important things you will communicate to your co-workers is the difference they make when they give through the CFC. It's vital that each employee knows they are helping others through their gift. Provide them with facts and information about the CFC's network of caring.

### **Outline for Sample Speech**

- Greet everyone – and thank them for attending.

- Give a brief overview of the CFC.
- Explain how the campaign works – both overall, and in your organization.
- Tell a personal story, if you have one, about help received from a CFC charity.
- Walk through and explain the campaign brochure.
- Give step-by-step instructions for filling out the pledge form.
- Ask for contributions.
- Offer one-on-one assistance if needed.

## **Say Thanks!**

### **Sample Employee Newsletter Article**

“Payroll Deduction Makes Donating to Charities Convenient”

Federal employees are an important part of each and every community where they work and where they live. As Federal employees, we can make the Intermountain region, the nation and international communities a better place to live when we take advantage of the opportunity to contribute, through payroll deduction and one time gift, to the Intermountain Combined Federal Campaign. This year’s campaign runs from \_\_\_\_\_ to \_\_\_\_\_. Your investment, small or large, makes a difference. You may choose to invest in medical research, the environment, education, reducing homelessness, community advocacy, social programs and much more through the CFC payroll deduction. You may also give a one-time gift to the charity of your choice through this campaign.

An investment of \$\_\_\_ can.... (Use the Campaign Facts – “What Your Gift Can Do”).

Last year federal employees invested \$\_\_\_ million! Together we can make a difference in our communities. Please pledge today. For more information about the Intermountain CFC, visit [www.intermountaincfc.org](http://www.intermountaincfc.org).

### **E-mail Examples**

#### **#1:**

The Intermountain Combined Federal Campaign begins \_\_\_\_\_ and runs through \_\_\_\_\_. Payroll deduction makes giving easy. It’s a sure way for the areas of concern for you and your community to get the financial support they need. You may also use this opportunity to make a one-time gift to the charity of your choice. A (xxxxx) event is planned for (date/time/location). Come and enjoy refreshments while finding out more about the different charities involved in this year’s campaign.

#### **#2:**

Did you know that if you pledge \$1.00 per pay period to \_\_\_\_\_ charity, you would be providing \_\_\_\_\_ (Pick a fact from “What Your Gift Can Do!”) The Intermountain Combined Federal Campaign is going on now.

Please pledge today. If you have any questions, please call (your name and phone #).

### **Endorsement from Agency Head**

Sample letter from agency head to employees: (Always obtain permission before sending anything in his/her name.)

Date

Dear Employees:

As employees of the \_\_\_\_\_, we take pride in our jobs and in the government we serve. In the next few weeks, we will have the opportunity to reach beyond our job assignments and show our commitment to the communities in which we live and work. From \_\_\_\_\_ to \_\_\_\_\_ we will be participating in the Intermountain Combined Federal Campaign.

Last year Federal employees raised \$\_\_\_ million. There are organizations throughout the community, nation, and the world to which we can contribute, and that’s what gives this campaign a personal dimension. If there is a cause that interests you, more than likely there is an organization to which you will want to contribute.

You will be given the opportunity, through payroll deduction, to pledge to a charity working on issues such as health,

the environment, education, hunger, social services and much more. You will soon receive campaign materials. I urge you to read the informational literature and then make a payroll pledge. Payroll deduction will begin on your first paycheck in 200X. Please join me in supporting a charity that matters most to you. Together we can continue to make a difference.

Sincerely,  
XXX

**Pre-campaign sample letter:**

To be used by the main agency Campaign Coordinator to send to Keyworkers as a general information letter.

Date

Dear CFC Volunteer:

Thank you for volunteering your time and creativity to the 200X Combined Federal Campaign. As we begin to plan a successful campaign for your location, I want to share some important details with you.

**Posters.** You should be receiving posters and supplies for the campaign. You may add a personal note to posters to encourage employees to participate, or include a message about your kick-off/promotional event.

**Campaign Promotional Materials.** Please report to me by (date) how many employees are at your location. You should receive your campaign materials by (date). Please distribute campaign materials as soon as possible. There are brochures available and for those employees who have the pc access, the CFC brochure is online at [www.intermountaincfc.org](http://www.intermountaincfc.org). Please return all one-time gifts with the employee's pledge card attached and payroll pledges by (date)\_\_\_\_\_. Solicitation begins on (date)\_\_\_\_\_ and wraps up by (date)\_\_\_\_\_.

**Additional Volunteers.** Additional volunteers may be needed at your location. If you know of anyone who would like to get involved in this important event, please let me know.

The 200X Intermountain Combined Federal Campaign is one way employees can positively impact the lives of thousands of people beyond job assignments and show commitment to the communities in which we live and work.

Thanks again for volunteering and contributing your time to such an important cause. Your contribution and creativity are what make this campaign successful. If you have any questions, please call me at (phone number).

In appreciation,

Campaign Coordinator

**Post campaign sample letter:**

To be used by the lead agency Campaign Coordinator to send to all the supporting coordinators following the campaign.

Date

Dear Keyworker:

Thank you for giving your creativity, time, and energy to the 200X Combined Federal Campaign. The campaign is a success because of people like you, who not only participate, but also contribute their time and energy to the campaign.

Together, we helped raise approximately (this year's approximate total) within (organization name). That would not have been possible without your efforts. Your contribution of time made it possible for federal employees to touch the lives of thousands. It was a pleasure working with you and providing fellow employees the opportunity to give back to their community.

In appreciation,

Campaign Coordinator

# Keyworker Guide

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Thank you for joining the CFC team! As a CFC Keyworker, your job is vital to the success of this year's campaign. Through your eyes, your fellow employees will see the value of the many agencies that CFC supports, and the people who are helped. This Keyworker Guide will help you succeed in your agency's campaign.

**Remember: every person and every pledge counts.**

## **GETTING STARTED**

Many people have difficulty getting started with "solicitation" because they are uncomfortable asking for donations. This is natural. Remember: you are not asking for donations for yourself, but for causes that benefit others every day. CFC-supported charities work year-round providing needed solutions to the problems of homelessness, substance abuse, crime, hunger, education and health issues at local, state, national, and international levels.

When you ask a fellow employee to make a CFC pledge, both of you are helping to make our world a better place for everyone to live and work. (For additional help, download the "Making the Ask" and "Overcoming Objections" documents at [www.intermountaincfc.org](http://www.intermountaincfc.org) → Campaign Team → Coordinators & Loaned Executives.

## **FOUR STEPS TO SUCCESS**

- **MAKE PERSONAL CONTACT.**

The most effective way of encouraging co-workers to donate is to approach them in person. The personal approach shows that you believe the campaign is worth your time and theirs. Please do not leave a pledge card on a desk without speaking to the prospective donor. Surveys show that the number one reason people do not make a contribution is because they were never personally asked! Ask everyone to contribute. If possible, share a personal story about why you're involved.

- **ENCOURAGE GIFTS VIA PAYROLL DEDUCTION.**

Payroll deduction is easy and convenient because it is paid throughout the year. The donor can give more by having a small amount deducted each pay period. Set the example: Contribute yourself. You will find it easier to encourage others to donate after making your pledge. Don't emphasize a large annual gift; rather, explain how easy it is to make a difference with just \$1 or \$2 per paycheck. Show them this year's incentive gifts. Use the "Your Gift Buys" document found at [www.intermountaincfc.org](http://www.intermountaincfc.org) → Campaign Team → Coordinators & Loaned Executives.

- **BE WELL-INFORMED. KNOW THE FACTS.**

Make sure you are an educational resource by knowing everything you can before beginning the solicitation. Review the CFC brochure and the pledge card. Familiarize yourself with the services CFC charities provide. Review the FAQ at [www.intermountaincfc.org](http://www.intermountaincfc.org) → About CFC. The more you know about CFC and its agencies, the easier your job will be. For additional information contact your Campaign Coordinator or CFC headquarters at (801) 399-5584 ext. 104.

- **RETRIEVE ALL PLEDGE FORMS, DISTRIBUTE LEADERSHIP GIFTS/INCENTIVE ITEMS AND SAY "THANK YOU."**

It is important to have a response from every potential contributor, regardless of whether or not they contribute. Remember to thank everyone you solicit. Everyone's time and/or gifts are truly appreciated and a pleasant "thank you!" is an important part of your efforts. Your task is complete when all the pledge forms are returned.