



The five
basics of
campaign
success



5: Wrap it up



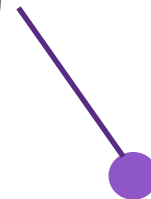
4: Promote your campaign



3: Line up the right resources

1: Know your department

2: Assemble your team





1: Know your department

Single versus multiple locations

Number of volunteers needed

Prior-year successes and challenges

Go with what works

Computer- versus paper-oriented workforce

Resources to use

Prior-year donors and new employees

Who to target

Pinpoint internal communication channels

Use what you have

Amount of top management support

Endorsements to seek

Your own capacity

*Scheduling, training and knowing your
“why”*

Keep it simple



2: Assemble your team

At least one volunteer per location
People who care

Rule of thumb: one volunteer for every 50 employees
Paper pledge forms require many volunteers

Engage agency specialists
HR and communications staff

Work with team to create timeline that includes kickoff, distributing messages and materials, and wrap up
Put it down on paper and assign tasks

Balance inspiration and realism

Order giving guides and (if appropriate) custom pledge forms

Follow up on our form

Explore www.coloradocombinedcampaign.org to see available items

Posters, flyers, postcards, emails, logos, video links, fact/figures/stats

Explore iPledge reporting features so you know how to track donors and donations

www.ipledgeonline.org/_coloradocombinecampaign

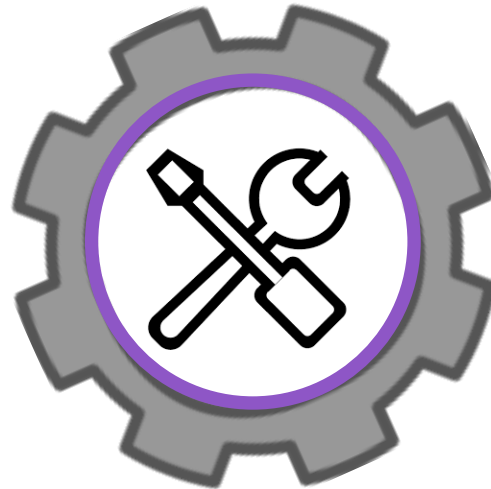
Get a copy of event request form if you plan to host a nonprofit fair or speaker

Must be received by CCC at least three weeks in advance

Apply for seed money

Look for request form

Ask the campaign manager for help



3: Line up the right resources

Have a definite start- and end-date
Build momentum

Distribute messages and materials
Use existing department channels

Plan activities your department will enjoy
Simple and short are often better

Use activities to collect pledge forms
A multi-month pledge IS workplace giving

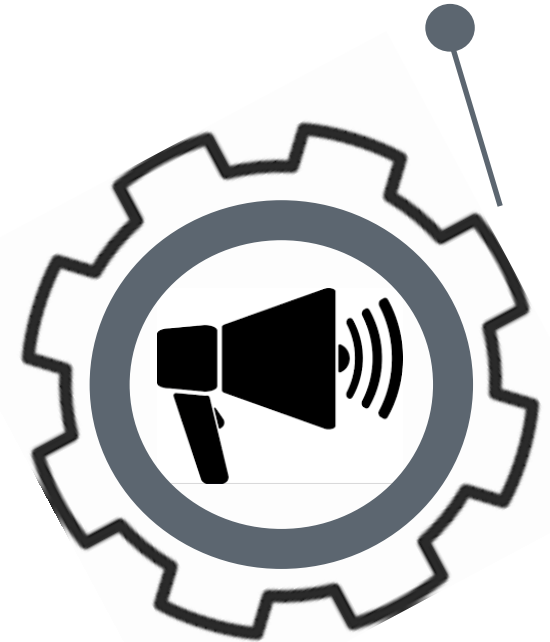
Use a thermometer to show progress
Find one at www.coloradocombinedcampaign.org

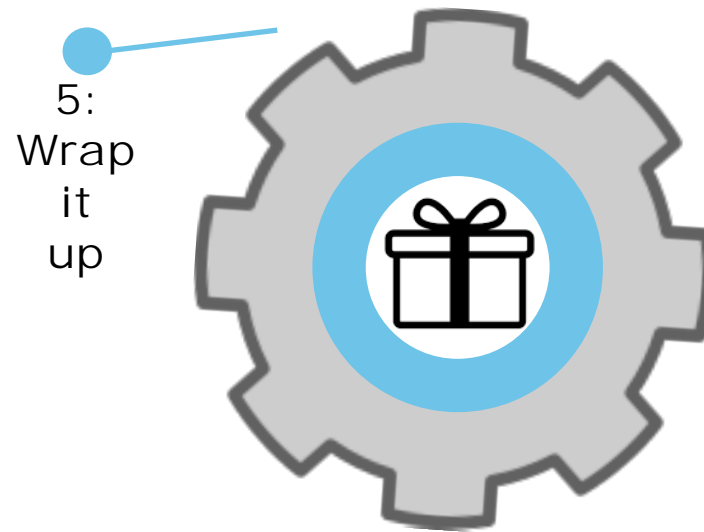
Remember overall campaign timeline
Help donors give when they want to

Ask!
Give everyone the opportunity to donate

Fundraising is about asking

4: Promote
your
campaign





Communicate the deadline to give
Remind, remind, remind!

Provide paper forms and tangible funds as directed
Look for instructions provided by campaign manager

Share results
Send an email, reveal at staff meetings

Say “thanks!”
Lay the groundwork for next year

End strong



PLANNING WORKSHEET

| | | | |
|--|---------------------------------|-------------|-------------|
| 2018 results | | | |
| Number of donors | | | |
| Dollars raised | | | |
| 2019 goal | | | |
| Number of donors | <i>Encouraged: +7%</i> | | |
| Dollars raised | | | |
| My team | | | |
| <i>Volunteer 1</i> | | | |
| <i>Volunteer 2</i> | | | |
| <i>Volunteer 3</i> | | | |
| Digital? <input type="checkbox"/> | Paper? <input type="checkbox"/> | | |
| Both? <input type="checkbox"/> | | | |
| How we'll distribute materials and messages | | | |
| <i>Channel 1</i> | | | |
| <i>Channel 2</i> | | | |
| <i>Channel 3</i> | | | |
| Events that our department would enjoy and participate in | | | |
| <i>Idea 1</i> | | | |
| <i>Idea 2</i> | | | |
| <i>Idea 3</i> | | | |
| CCC resources we'll need | | | |
| <i>Such as: nonprofit speaker</i> | | | |
| <i>Such as: seed money</i> | | | |
| <i>Such as: thermometer</i> | | | |
| Our campaign start date | Our campaign end date | | |
| | | | |
| Our campaign timeline (key milestones by month) | | | |
| <i>Sept.</i> | <i>Oct.</i> | <i>Nov.</i> | <i>Dec.</i> |
| | | | |
| | | | |
| | | | |
| How we'll kick off our campaign | | | |
| | | | |
| How we'll wrap up our campaign | | | |
| | | | |
| How we'll involve our top leadership | | | |
| | | | |
| | | | |

Notes