Nuts & Bolts of Running a Campaign
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1: Set a goal
2: Set a deadline
3: Order hard-copy materials if so desired
4: Encourage giving – send out campaign messages and materials
5: Host events
6: Monitor campaign progress
7: Ask, remind, repeat
8: Turn in any paper pledge forms and tangible funds
9: Announce results and thank donors

For each: steps to take and resources to help you
Nuts and Bolts of Running a Campaign

1: Set a goal
● Refer to prior-year results and consult with department leadership and volunteer team.
● Dollars come from donors, so focus first on participation goal.
● Campaign challenge 2019: at least 7% increase in donors.
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Resources to help you

• 2018 campaign results report: find at www.coloradocombinedcampaign.org/campaign-resources
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Resources to help you
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2: Set a deadline

- Consult with department leadership and volunteer team to figure out what works best for you.
- Remember that campaign overall has a timeline (Tuesday, September 3 – Friday, January 3) and donors can give throughout that time.
- Note: donors can give on paper or online; one-time or recurring gifts; and, by payroll contribution, credit/debit card, check, e-check, or cash.
- Note: there is no minimum donation.
- Note: donations are post-tax and tax deductible.
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3: Order hard-copy materials if desired

- Complete and return Lead Coordinator Information form.
- Consider: resource guides, paper pledge forms, customized paper pledge forms.
- Not mandatory. What works best for your department?
- Most departments: combination of paper/online.
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Resources to help you
● Lead Coordinator Information Form: find at www.coloradocombinedcampaign.org/campaign-resources
● Paper pledge form: find at www.coloradocombinedcampaign.org/campaign-resources
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Resources to help you
4: Encourage giving – send out campaign messages and materials

- If using paper materials: resource guides, paper pledge forms, customized paper pledge forms.
- If running a digital campaign and using “soft” materials: links to website, resource guide, iPledge online giving site.
- Download and use posters, postcards, emails, etc. available to you as templates.
- Use department communication channels (email, intranet, meetings, common spaces, etc.) to share fundraising and participation results.
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Resources to help you

- Website: find at www.coloradocombinedcampaign.org
- Resource guide: find on homepage and elsewhere at www.coloradocombinedcampaign.org
- iPledge online giving site: find at www.ipledgeonline.org/coloradocombinedcampaign
- Templates of marketing materials: find at www.coloradocombinedcampaign.org/campaign-resources
- Resources for donors: find at www.coloradocombinedcampaign.org/donor-resources
- General donor questions: email info@coloradocombinedcampaign.org
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Resources to help you
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5: Host events

- Nonprofit fairs and chili cookoffs tend to be most popular.
- Nonprofit fair: book a conference room, bring in some tables, invite local nonprofit representatives to attend, promote to your employees; like a trade show.
- Use Nonprofit Event Request Form to get help in lining up nonprofits.
- CCC will also attend nonprofit fairs, to answer donor questions, provide materials and provide a small amount of “swag.”
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5: Host events

- Chili cookoff: book a conference room, invite employees to bring their best chili, promote to your employees, pick winners.
- Chili cookoff: often used as “special event fundraiser” to collect extra donations for department’s campaign.
5: Host events
● Refer to larger list of events for additional ideas.
● Hosting events is not mandatory and is at the discretion of the Lead Coordinator.
● Use events as a way to raise campaign awareness more than as fundraisers.
● Asking employees to make recurring payroll gifts is the heart and soul of the campaign.
● Use “seed money” to buy supplies for your events and/or to purchase donor incentives (or, seek donations).
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Resources to help you
- Nonprofit Event Request Form: find at www.coloradocombinedcampaign.org/campaign-resources
- Fundraising and event ideas: find at www.coloradocombinedcampaign.org/campaign-resources
- Seed money application form: look soon
- Sample donation request letter: find at www.coloradocombinedcampaign.org/campaign-resources
6: Monitor campaign progress

- Check your department’s running total anytime at iPledge (click on “View Campaign Totals” button).
- To get a more detailed report, log on to your own iPledge account and go to: my tools/coordinator/view donor data.
- Expand details (click green plus sign) and run an Excel report (look for, “Download CSV of this report”).
- Remember that information about donors is provided to you in confidence. Please use discretely and appropriately.
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Resources to help you
● Monitoring campaign results: find at www.coloradocombinedcampaign.org/campaign-resources
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Resources to help you

Monitoring campaign results from the iPledge homepage

Monitoring campaign results using coordinator access
7: Ask, remind, repeat

- Keep encouraging your department’s employees to participate and remind them of the deadline. People are busy and it takes a few asks.
- Be specific about the call to action: complete and hand in a paper pledge form, or sign up and donate online.
- Share information about CCC prizes that are available to all donors, along with any incentives your department may offer.
- Remember that simply asking employees to give is the #1 role of Lead Coordinators. People don’t give if they’re not asked.
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Resources to help you
● Information about donor prizes: find at www.coloradocombinedcampaign.org/campaign-resources
8: Turn in any paper pledge forms and tangible funds
● Throughout your campaign, collect paper pledge forms and organize them by division (if your department is organized that way on iPledge). Safely secure forms and any related funds.
● Fill out a Pledge Processing Form for each “batch” of forms and funds.
● Note: paper pledge forms can be for all types of donations – cash, check, e-check, credit/debit card and payroll contribution.
● As a courtesy, make copies of forms that show payroll contributions and give to your payroll officer.
8: Turn in any paper pledge forms and tangible funds
● Get ALL forms (ALL types of donations) and ALL tangible funds (cash, check) along with related Pledge Processing Forms to the CCC after the close of your campaign.
● Mail, securely ship or deliver to: Colorado Combined Campaign, 789 Sherman Street, Suite 230, Denver, CO 80203.
● Or, arrange for a pick up by calling the CCC at 720-420-3210.
● Look for updates from the CCC about final deadlines for turning in forms and funds to the campaign.
8: Turn in any paper pledge forms and tangible funds

- Refer to the sample Pledge Processing Form to see an example of how to fill it out.
- Indicate type of donation, number of donors and dollar total.
- Note: the CCC cannot accept a batch without a Pledge Processing Form. The form is necessary for accounting and auditing purposes. It is your accounting to us of what you’re handing in.
- In January, the CCC will submit a report to your payroll officer which shows ALL payroll contributions (online and from paper forms).
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8: Turn in any paper pledge forms and tangible funds
   • In a pinch, forms with intangible funds (credit/debit card donations, payroll contributions) can be scanned and emailed to: info@coloradocombinedcampaign.org
Resources to help you
• Blank Pledge Processing Form: find at www.coloradocombinedcampaign.org/campaign-resources
• Sample of completed Pledge Processing Form: find at www.coloradocombinedcampaign.org/campaign-resources
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Resources to help you
9: Announce results and thank donors

- Use department communication channels (email, intranet, meetings, common spaces, etc.) to share fundraising and participation results.
- Use individual emails, simple notes and face-to-face communication to thank donors and your volunteer team.
- Make use of templates of various types of thank-you materials.
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Resources to help you

● Templates of marketing materials: find at www.coloradocombinedcampaign.org/campaign-resources
Final notes
● Use planning materials to map out campaign strategies.
● How you run your campaign is up to you (beyond submitting necessary forms, handing in pledge forms and funds, and meeting overall campaign deadlines).
● Answers to frequently asked questions (for both donors and Lead Coordinators) are on the website.
● Lots of resources for donors are on the website (lists of participating nonprofits, examples of impact, etc.)
● We share a lot of campaign information on our Facebook page: www.facebook.com/coloradocombinedcampaign.
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Resources to help you

● Planning materials: find at [www.coloradocombinedcampaign.org/campaign-resources](http://www.coloradocombinedcampaign.org/campaign-resources)
● Donor FAQ and other resources: find at [www.coloradocombinedcampaign.org/donor-resources](http://www.coloradocombinedcampaign.org/donor-resources)
● Lead Coordinator FAQ: find at [www.coloradocombinedcampaign.org/lead-coordinator-faqs](http://www.coloradocombinedcampaign.org/lead-coordinator-faqs)
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Moving forward

Lead Coordinator questions, concerns, needs
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