12 Simple Steps
to increase how much you raise in a workplace campaign

A workplace campaign is a great place to build your base of individual donors

Our clients often ask us how they can increase the amount they raise in the Combined Federal Campaign or a similar workplace fund-raising drive. Often they have seen little or no increase in the amount their agencies are receiving. Sometimes they report a decline as the number of charities competing for these gifts keeps increasing (more than 3100 in the 2002 DC area CFC drive).

In many cases, these people report that they have invested very little in trying to increase these gifts. They are not sure how to do it. Perhaps they've tried one thing and it hasn't had much impact. They are often skeptical that they can do much of anything.

We are convinced that there is *a lot* most charities can do to increase the amount they raise in workplace campaigns.

We also think it is very important to do so. A workplace campaign is a great place to start building your base of individual donors, a base that is so important at times like these when foundations, corporations and wealthy individual donors are having to cut back.

This is especially true in DC. Not only can you be part of the huge federal campaign (which raised $47 million in DC in 2002), you can be on a list to receive on-the-job gifts through the DC-area United Way *even if you are not a United Way agency*.

We know most charities simply don't have a lot to invest in a workplace campaign. But there are many things you *can* do that involve a relatively small investment of money and time. Many of these ideas stem from basic principles of individual fund raising. In essence you are trying to raise money from individuals at work.

After our 20 or so years of experience with workplace campaigns, we have developed a simple 12-step program to increase what you raise at the workplace. Just as with any individual fund raising, there are no guarantees.

But the only way you will know for sure whether the workplace has more potential for you is to try some of these steps for at least two or three years. If you haven't built up your base of supporters in the workplace by then, put your focus elsewhere. But the potential of getting a significant amount of money fairly easily year after year through workplace campaigns is great enough to give it a try.

1. Understand the value of payroll deduction.

In the CFC, the average payroll deduction gift is **three times larger** than a direct gift ($198.74 vs. $61.86 in 2001). The reason is simple: it is much easier to have five dollars a week deducted from your paycheck than to write out a check for $260.

This is the key to workplace fund raising, which some have called the best way to raise money from individuals short of the church collection plate!

This is why it is smart to encourage existing supporters to give at work. It is also why it is worth investing a little time and money in an effort to identify potential new supporters at the workplace.

2. Understand that you *can* make a difference.

Surveys of CFC donors have found that between 55% and 60% of these people were new donors. A survey done by Independent Charities of America found that only one in five CFC donors had decided which charities to support when they received their CFC pledge cards.

Given that about 1.46 million people made gifts through the "CFC" in 2001, that’s a lot of potential donors. The fact that employees often support different charities from year to year also underscores the importance of thanking and involving your current workplace donors in your cause. You just can’t assume they will give to you again.

3. Determine whether you have a clear constituency.

A clear constituency would be families and friends of Alzheimer’s patients, African-American women, members of the military, etc.

If you do have such a constituency, you have a good chance of increasing what you raise at the workplace. Your focus should be on ways to reach these people.

4. Figure out how to appeal to your potential supporters.

When you write your 25-word descriptions, don’t try to appeal to everyone. Appeal to those who are already inclined to support your cause. If you are an animal rights organization, don’t try to convince people to support animal rights. Assume that anyone who would support you already supports animal rights. Your job is to convince them to support *your* work on animal rights. What makes your work stand out?

5. When you write that description and talk about your work, don’t just emphasize what you do, emphasize *why* you do it.

Why is *your* work so important? How does it impact real people? Tell a story about how your work has made a difference in people’s lives. People remember stories. They tell stories to others.

Resist the temptation to impress people by listing every service you provide. You are *not* writing a proposal. You are trying to catch someone’s attention. Pull their heartstrings. Make them angry about some injustice. Feel good about what you do.

6. Test your description.

Ask two or three people not intimately involved with your work to look at it and give you feedback. Neighbors. People at church. Your brother-in-law. Do they understand what you do from your description?

So often we use terms like “technical assistance” or “legal advocacy” that seem obvious to us but are jargon to most people.

Does your description give them a sense of urgency? Excitement? Does it make them more likely to support you?

If you can do an informal "focus group," that could be very revealing. We can send you an article about doing your own focus group.

7. Identify your potential supporters in the workplace.

This is crucial, yet many charities don't do it. Ask your supporters, volunteers, staff and board members if they work for the federal government or a private company with a United Way campaign, or know people who do. Ask people who come to your meetings or trainings.

Make this designation a part of your sign-up sheets and database. Particularly in the DC area, almost everyone has personal connections to federal employees as well as people who can give through the United Way.

8. Thank your CFC and United Way donors and pull them into your work.

"I am continually amazed when I'm doing a fund-raising workshop and I see that a group gets $20,000 from United Way," says Tricia Rubacky, senior development advisor for the Maryland Association of Nonprofit Organizations. *"They tell me that this is money that individual donors have designated for them, but they have no contact with these people. I tell them: this is your base of individual donors. You've got to connect them to your organization."*

For CFC donors, you will get their addresses as long as they don't request anonymity. You need to automatically thank them and put them into your database of individual donors.

For United Way donors, you will often just get their names. Rubacky believes it is worth it to do some research to get their addresses (through Yahoo or a similar online service). Then, at the very least, send them a thank you. Tell them how you will put their money to good use. Send them newsletters, announcements, alerts. In your initial thank you, make sure you give your donors the option of not receiving everything you send to donors.

The need to identify and connect with your workplace donors has been made crystal clear in the DC area. Thanks to a series of embarrassing revelations, giving through the local United Way plummeting from about $40 million in 2001 to just $15 million in 2002. That is a huge number of people who are no longer giving through United Way.

Individual charities need to search for lists of donors from past years, track down their addresses and appeal for direct gifts. Had a charity been gathering these names and addresses all along, it could much more easily restore some of the funding it has lost because of United Way's troubles.

Paul Krizek, executive director of Christian Relief Services, surveyed his CFC donors to find out why they gave to his organization. He says they didn't mind responding: *"It was a way to help us that didn't involved making a donation."* He adds that his organization learned a lot about what led people to give to them.

In the fall, when it comes time to give again, ask them to do so. Remember that employees often change which charities they support from year to year.

Also urge them to ask their colleagues to give to your cause. Give them a one-page "talking points" about why they should give to you. Give them a story to tell!

Jim Abernathy, the executive director of the Environmental Support Center and a key figure in the movement to open up workplace campaigns to more charities, reports that many environmental funds that raise money at the workplace have systematically developed a core of "friends" within workplaces who support them.

"They have a huge impact with informal contact," Abernathy explains. "Conversations at the water cooler can make a big difference."

As every fund-raising trainer will tell you, nothing is more important than the "ask." If someone you know asks you to support a particular charity, there is a very good chance you will do so.

In the CFC, someone with an official role in the Campaign (often called a "keyworker") cannot advocate for a particular charity. But there is nothing to prevent your supporters from having informal conversations with their colleagues at lunch or during a break. They shouldn't put your flyers in every mailbox in their agency, but they can distribute them less formally to colleagues.

9. Constantly remind people that they can support you through the CFC or United Way.

Put it in every newsletter, in your alerts and other communications, in your "signature" on e-mails. Use your CFC number. There are so many charities in the CFC, if you don't remind them that they can support you at work, they may not realize they can do so.

10. Tout the fact that you have qualified to be in the CFC.

You have met 10 accountability standards, including low overhead. Especially today in DC, where the United Way has lost so much credibility, people need to be reassured. (You can find a simple explanation of these 10 standards on our website: www.CharityChoices.com.)

11. Get your name and cause out there, especially in the fall.

People give to organizations and causes they hear about. The more they hear about your work, the more credibility you will build.

Come up with a simple communications plan for the fall. Release studies or reports in the middle of the campaign. Early October is probably the best time. Every fall the Chesapeake Bay Foundation releases its "State of the Bay" report, a perfect reminder both of the need to improve the bay *and* of the important role played by this organization.

It's a little overwhelming to look at all the names of charities in the CFC. Each one doubtlessly has a good cause. Their names often sound compelling. But many if not most of them I've never heard about. Which makes it unlikely that I will support them unless someone I know asks me to do so.

You need to do as much as you can to get your name out there, especially among people who may be sympathetic to your cause.

Admittedly we are biased, but we believe that the best way to do this is to participate in Charitable Choices guides and website!

Being in either of our two CFC guides (one is distributed to federal and military employees nationally, one in the DC area) is a way to communicate your name and work to more than 175,000 employees.

Being in our Washington Post guide gets your work in front of more than 325,000 people.

Both large and very small charities participate in our guides. Many of these smaller groups have found that being in our guides is a useful way to get their work in front of lots of people, a way that gives them the same opportunity to explain their cause as much larger charities.

"Small organizations like ours can't afford expensive advertising campaigns," writes Ann C. Keep, executive director of the Visitors' Services Center/DC Jails. *"The Charitable Choices guide gives us equal billing with the big charities and lets our simple, effective mission shine through."*

12. Attend CFC charity fairs and kick-off events.

These take time, but the Alzheimer Association's survey of CFC donors found that they were the second most effective way of attracting new donors (after being in the Charitable Choices guides!). Going to these events is a good task for your volunteers.

Sometimes you can get on the program to speak about the importance of giving through the CFC. That's a great opportunity to tell your story!

If you are in the DC area, contacting all the agencies that hold kick-off events or fairs can be too much work. There is no central repository for this information. ***Fortunately, Charitable Choices e-mails lists of CFC events to its DC-area clients each fall. Some CFC federations also do this.***

If you are in a different CFC, the key person is the CFC Coordinator, who works for the local CFC's "Principal Combined Fund Organization." This is the CFC federation that administers the local CFC, usually the local United Way. This is a good person to contact.

You can track down contact information by going to the national CFC website: www.opm.gov/cfc. Go to "Local campaign information," then to "Local CFC offices." There you will find a list of each CFC's "PCFO" and the name and contact information for the person who administers the local CFC. This is the person who processes applications each year. It's also the person who helps organize the fund-raising campaign in the fall.

You can find out from this person when the kick-off event is scheduled and when charity "fairs" or other CFC-related events are going to happen. Tell this person that you would like to attend and that you are willing to speak.

When you go to a CFC "fair," you will see that charities often give away all kinds of things designed to remind people of their existence, such as paperweights or tote bags. These give-aways can make coming to a fair fun for employees. But I'm not sure they help individual charities much unless the give-away is something that is related directly to the charity's work: signs of a heart attack for a health charity, a list of local shelters with phone numbers for a charity concerned about battered women, that kind of thing. This communicates a message about your work. Spending dollars on a nick knack might communicate a different, less desirable message!

I also like having a simple, one-page summary of why people should support your work: "Seven reasons we need your help."

Rome wasn't built in a day…

Another principle of raising money from individuals is that you have to build your base of supporters over time. This is certainly true of building support within a workplace campaign. Think of it as a 3-year campaign. One ad, one flyer, one newsletter article is not enough. You need to build name recognition and a base of support over time. You need to develop your list of friends and supporters who can give through the CFC or United Way over time.

As you get a few CFC donors, ask them to help you reach their colleagues. That's the whole idea of building a "base" of support: it gives you something on which to build for the future!

Tim Saasta, director and co-founder of Charitable Choices, wrote this article. Since 1985, Charitable Choices has been printing and distributing alternative guides to charities eligible for the Combined Federal Campaign. It also maintains a website (CharityChoices.com) that includes information about all the charities in its guides, as well as information about qualifying for the CFC.

For more information about Charitable Choices' services, call 240-683-7100 or e-mail info@charitychoices.com.

Thoughts or suggestions about increasing how much you raise at the workplace can be sent to Tim@CharityChoices.com.