



# Designing a Successful Fund Raising Campaign for Your NGO

by  
Susan Pezzullo and Julie Rice



International Youth Foundation®

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## **International Youth Foundation®**

Founded in 1990, the International Youth Foundation (IYF) is one of the world's largest public foundations working to improve the conditions and prospects for young people where they live, learn, work, and play. Currently operating in more than 60 countries, IYF and its global network of partner organizations have helped more than 21 million young people gain access to the basic life skills, education, job training, and opportunities critical to their success.

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# INTRODUCTION

This booklet is part of a larger effort being undertaken by the International Youth Foundation (IYF) to explore issues related to strengthening the sustainability of nonprofit organizations. IYF's work is predicated on sustaining long-term supports for young people at the local, national, and international level. At the heart of these efforts has been the creation of a global network of national Partner organizations, each committed to promoting effective programs and policies that enable young people to develop their full potential.

Outlined here are the steps involved in planning and implementing a successful fundraising campaign. The examples and lessons are derived from campaigns managed by IYF Partners in 1999 and 2000. Most were campaigns based on a concept developed in the United Kingdom called Children's Promise, in which individuals and companies were asked to give the last hour of their earnings for the millennium to support development programs for children and youth in the next millennium. While Partner campaigns were carried out as part of IYF's global Children's Hour campaign, this booklet contains practical advice and ideas for any nongovernmental organization (NGO) interested in conducting a campaign as part of its overall strategy to increase its financial sustainability.

In this booklet, you will read about:

- Deciding what your organization wants from a campaign and how to create the capacity to design and manage one;
- Developing a communications strategy aimed at companies, their employees, and the general public;
- Mobilizing companies and their employees; and
- Managing the campaign thoughtfully so that the benefits continue after the campaign is formally over.

As you read this booklet, reflect on your organization's financial sustainability goals. Is your organization actively seeking to differentiate itself and create a clear image? If so, how might a campaign advance that effort? If your organization also decided to diversify its sources of support to include individual supporters, is a campaign the method of choice for your organization? Assuming that your organization does not have limitless capacity, what level of attention can you give a campaign so that it provides your organization with more relationships, a clearer image, and more resources?

# GETTING STARTED

This section describes the steps IYF Partners took to ensure that their campaigns started with sufficient clarity, capacity, and planning. Specifically it explores several aspects of readiness: setting goals, communicating your campaign image or brand, creating internal capacity, and defining your campaign timetable.

*Your challenge is to develop a unique, simple campaign that emphasizes the direct, positive impact that giving will have on a particular issue or population.*

## Know your Competition and Set Realistic Goals

To get your campaign off to a good start, you need to ask, "where do I want to end up?" If this is the first time your organization is doing a campaign, it might be hard to answer this question. Start by clarifying what you want for your organization and its causes in terms of 1) visibility; 2) resources, both financial and non financial; and 3) future actions in support of your organization or its causes by companies, people or other entities. Do some research on what other campaigns of similar size and effort have achieved. Ask yourself if your organization has the time, resources and energy to do as well or better than these other campaigns.

Doing research on potential competition from other campaigns is essential for solid goal setting and planning. IYF Partners asked these types of questions in planning their campaigns:

- When should we run our campaign, given other campaigns in the country?
- Are the potential benefits of our campaign different from those of other campaigns? Can our "benefits" stand out?
- Why should people give to our campaign when there are other campaigns competing for peoples' support?
- Are there any opportunities we can build on to differentiate our campaign?

If, in asking these types of questions, your organization is not able to differentiate its campaign from other efforts, then perhaps you are not ready to plan and implement a campaign.

Another question to ask yourselves is whether people generally care about the issue your campaign wants to promote. IYF Partners had an advantage in that most people care about children and youth. Companies can see the advantage of being associated with that cause, as do governments and other civic organizations. What about the cause you want to promote? How hard will it be to mobilize people behind what your NGO does? If you have any doubts about how well your

cause resonates with peoples' hearts and minds, do some more research. Ask people who are not close to your work and will give you a representative picture. If you can, interview someone who does market research for companies or a media person who is well versed on public opinions on social issues.

If your organization decides to design a campaign, chances are that no matter when you conduct it, there will be competition, making thorough advance planning and preparedness all the more important. Your challenge is to develop a unique, simple campaign that emphasizes the direct, positive impact that giving will have on a particular issue or population. You need to differentiate your campaign using messages, visual elements, and communications vehicles creatively and effectively.

IYF's Partner in Slovakia decided that it wanted to have a national campaign that would raise awareness and funds throughout the country. It succeeded in raising more funds than any local civil society organization in recent history, \$303,000 in 1999 and \$279,716 in 2000. In Poland, IYF's partner decided to conduct a more modest campaign in terms of its media outreach and company recruitment efforts. In pursuing its campaign goals, the Polish Children and Youth Foundation (PCYF) built on its longstanding media connections and relationships with local government offices. Both Slovakia and Poland were pleased with their respective efforts since they set realistic goals based on their level of effort and knowledge of the external environment.

## Communicate your Goals

In communicating your campaign goals to the general public you need to craft your message carefully. The campaign goal(s) should be communicated in clear, simple language, be realistic and measurable. Test your goal statement on board members and friendly supporters to make sure it sounds distinctive and compelling. Fundação Abrinq, for example, publicized the goal of its campaign as an effort to benefit one million children. It resonated with Brazilian newspapers and businesses, and was achievable and tangible. Part of the reason Fundação Abrinq could credibly make this claim is that when the campaign started, it already reached approximately 750,000 children through its various initiatives. With funds from the campaign it would reach an additional 250,000 children. Other Partners discovered the same lesson. Campaign goals focused on a desired social outcome or benefit—whether for children, the environment, or another cause—are effective.

*Test your goal statement on board members and friendly supporters to make sure it sounds distinctive and compelling.*

*It is important to be very realistic about your costs and your ability to 1) cover a high percentage of your costs through sponsorships and donated services; and/or 2) raise enough funds to cover your costs and generate a "surplus" to invest in your cause.*

For planning purposes, your organization might have a series of internal objectives and targets that are not publicized. Partners developed projections—for example, amount of funds to be raised, number of individual donors, and number of companies recruited—in order to gauge the costs and benefits of the campaign. They also needed these types of data to convince board members, staff, and others of the benefits of a campaign. A few tips from this process:

- Research what other first-time campaigns by similar size NGOs have raised in the past and use these data as a yardstick;
- Do not over-estimate the amount you will raise; one Partner set its target too high and as a result there was a sense of disappointment among board members, even though the organization raised almost \$1 million; the problem was it was 1/20th of what the NGO thought it would raise;
- View your monetary goals as only one of several; equally important might be increasing your name recognition, forming new relationships with companies and individual supporters; and creating more and closer contacts with the media.
- Keep reminding board and staff members how the campaign fits into your organization's overall growth and sustainability. Creating a positive identity is a process that takes time and effort as does building a support base.

## **Secure the Right (and Enough) Resources**

Developing a solid plan for your campaign involves creating a good budget. As with any project, taking the time to plan well and anticipate your expenses and revenue is time well invested. The types of expenses your organization can anticipate include:

- Personnel
- Services such as public relations, graphic design, printing
- Communications (postage, telephone)
- Products such as t-shirts, buttons, and other items
- Travel
- Events
- Administration

- Technology, if you need to purchase and install a donor database to log in, track, and acknowledge contributions

Once you have developed the budget, you will want to scan the organization to identify existing assets (personnel, volunteers, technology, website, brochures, etc.) that can be re-deployed to implement the campaign. For some, such as personnel, it is possible to use existing resources to keep your costs down. For other costs such as campaign-specific promotional efforts and materials, you can anticipate new areas of expenditure.

It is important to be very realistic about your costs and your ability to 1) cover a high percentage of your costs through sponsorships and donated services; and/or 2) raise enough funds to cover your costs and generate a "surplus" to invest in your cause. Throughout the campaign keep revisiting your expense and income ratios to make sure you are spending wisely and getting a level of benefit that is commensurate with your level of investment. Brazil's Fundação Abrinq had a cost-benefit ratio of 1:13.8!

IYF Partners succeeded in mobilizing donations to cover all or most of these costs. Ecuador's campaign cost \$111,295 to implement; through cash and in-kind donations it was able to cover its campaign expenses. In the Philippines, the total value of in-kind contributions for media-related support exceeded \$1 million. The Filipinos covered 97% of their campaign costs through sponsorships and in-kind donations. In a later section we address how to mobilize support from the private sector to underwrite the costs of your campaign.

## Form a Strong Team

Early in the planning process, Partners created steering committees to lend prestige, visibility, and support to their campaigns. Members included leading public officials, business executives, board members, media owners, and other prominent individuals. The members' names appeared on campaign print materials and they made public appearances on behalf of the campaign. Steering committee members also were helpful in securing introductions and meetings with business and media executives who subsequently agreed to sponsor the campaign or provide matching funds.

Depending on the scope of your campaign, the number of people required to manage the day-to-day operations will vary. You will need to assess staff and volunteer availability and experience as you design your campaign. While staffing will vary, here are some of the job categories that existing or temporary staff will need to fulfill:

*Depending on the scope of your campaign, the number of people required to manage the day-to-day operations will vary.*

**Campaign Manager** – responsible for day-to-day operations, overseeing the campaign staff and reporting to the board and other interested parties. This will be a full-time role. *Alternative:* If you do not have the resources to create this position, consider having the executive director coordinate the effort with the understanding that he/she needs to be able to delegate operational issues to competent staff.

**Advertising and Media Relations Director** – responsible for developing messages, materials, and relationships with key media outlets, as well as for planning special events and working closely with the campaign spokesperson. Depending on the scope of your communications department, this will be a full or nearly-full time role. *Alternative:* You can use your existing communications person and team her/him up with a volunteer public relations expert.

**Corporate Relations Manager** – responsible for generating a list of potential corporate participants, and a strategy to cultivate company support; overseeing the implementation of the campaign's corporate strategy. This should be a full-time position, unless your organization chooses not to cultivate relationships with corporations. *Alternative:* A senior-level person with strong leadership and communications skills who is able to coach and supervise volunteers.

**Financial Manager** – responsible for overseeing all financial aspects of the campaign (donor database, accounting, receipts, allocation of funds raised, etc). This person's professionalism will help create confidence among donors that their money is safe with your NGO. This should be under the purview of your organization's existing accounting and technical support personnel.

**Administrator** – keeps all records of the campaign for current reference and future use. This role could feasibly be combined with another to conserve resources, but its importance in terms of maintaining the organizational integrity of the campaign cannot be overstated.

**Program Support** – provides information to participants about the programs to be supported through the funds raised. This aspect of the campaign should be incorporated into the work of the NGO's program staff.

Some IYF partners created a separate entity to augment their capacity to design and manage a national campaign. The Children and Youth Foundation of the Philippines (CYFP) and the Ayala Foundation built a secretariat to manage the campaign. CYFP seconded an advertising manager and a writer to the secretariat; the Ayala Foundation supplied corporate management and volunteer staff. The secretariat managed day-to-day details, implementing the decisions of a steering committee made up of high-level public officials and business executives. Ireland's campaign was managed by a special campaign committee, which reported to the board of Irish Youth Foundation and coordinated with staff.

Fundação Abrinq's (Brazil) existing staff members, who have strong skills in the areas of fundraising and public and corporate relations, absorbed the campaign's additional work. The Czech Republic's NROS, allocated one full-time staff and several part-time workers to manage its first year campaign. For the second year there are three full-time staff, one member of whom is fulfilling a civil service commitment as an alternative to military service.

The Children of Slovakia Foundation (CSF) advises an NGO conducting its first campaign to find an energetic, creative person to handle the communications side (e.g., to develop the strategy to promote the campaign brand, to oversee its implementation, to use their media contacts, etc.) who works closely with the organization's program director, who brings credibility and knowledge of the issues.

The key team members must plot every aspect of the campaign, from the operating budget and timeline to the identification and pitching of target audiences to the reporting of how the funds raised were spent.

Each of these areas will fall under the specific responsibility of one team member and a reporting system should be established so all team members are aware of one another's activities. Organizing your operation from the beginning with clear responsibilities and lines of communication will increase public confidence in the campaign. Your corporate supporters will appreciate your efficient, business-like approach.

The final step in getting ready is to define a timeline. Be sure your staff has input and is clear as to what their responsibilities are so they may judge whether the target dates are achievable.

*Using the key team members you have identified, you must plot every aspect of the campaign, from the operating budget and timeline to the identification and pitching of target audiences to the reporting of how the funds raised were spent.*

# MARKETING YOUR CAMPAIGN

## Create a Clear Brand

A fundraising campaign is one vehicle for reaching new audiences and heightening their awareness of your organization and its issues. With a campaign your organization's image will be enhanced or tarnished according to how people perceive the campaign. Without exception, IYF Partners' identity was enhanced as a result of their campaigns. Key to their success was selecting effective messages, visuals, and communications vehicles to establish the campaign brand in the minds of the audiences they wanted to reach.

The better you identify and understand your different audiences, the greater your success in creating your campaign brand image. Partners in Slovakia, the Philippines, Brazil, and Ecuador, for example, targeted two different audiences: company executives and individuals working for the companies. To communicate the purposes of the campaign to companies, Slovakia developed a personalized letter on campaign letterhead. Trained staff followed up with visits or telephone calls. For individuals, the Slovaks developed a brochure with pictures of potential beneficiaries, a description of how their contributions would be used and information on the organization running the campaign. To sensitize the general public, CSF ran radio and television spots and placed stories and advertisements in major newspapers. The Slovaks found that overly emotional advertisements featuring the neediest children were not an effective way to capture the message and essence of their campaign. Instead, they found more light-hearted television spots, highlighting children's personalities and joy for life, to be more compelling and consistent with their campaign essence.

IYF Partners used a variety of strategies to create awareness and positive feelings about their campaign. It was important that the different strategies and vehicles all communicated a consistent look, message, and content about the campaign.

## Use the Media

Using mass media proved the most efficient and effective way to create broad awareness of the campaign. Partners followed some basic principles for developing a good media strategy:

- Define how you want to "brand" the campaign in the minds of your audiences. Partners used the end of the millennium to create attention around a unique opportunity to make the next millennium better for children. In addition to communicating opportunity, the brand expressed

*The better you identify and understand your different audiences, the greater your success in creating your campaign brand image.*

hope for a better future, making a difference, investing in strong programs, and impeccable accountability. A special logo and other visuals were created to promote the campaign.

- Develop a clear, easy message; some partners reinforced their message with a jingle. The Philippines' tag line: "It's time to care, it's time to share" worked well, for example.
- Target specific audiences and know their preferences so your messages and communications are effective.
- Cultivate relationships with journalists, television and radio people.
- Refer to your plan and timeline and adjust accordingly.
- Orient staff and all volunteers on your communications strategy and materials so they use them effectively.
- Provide reliable and clear information.

For Partners whose organizations were not well known among the media, having a celebrity(ies) associated with the campaign proved beneficial. By having the celebrities, Partners found it easier to attract media attention. If you use a celebrity spokesperson you need to ensure that he/she does not become the focus of all attention, obscuring the campaign message and your organization.

Your media outreach plan also should include:

- A launch event that draws media coverage;
- Use of campaign materials such as brochures, template press releases, pre-written stories for smaller publications, and footage about your cause;
- Lists of key media outlets and journalists to target;
- Ongoing events and briefings to keep the media informed;
- Preparation and use of experts to discuss the issues, and
- A clear statement on how your campaign will benefit a specific population or issue.

Slovakia's CSF cultivated an existing relationship between a board member and the largest TV station in the country. Television and radio provided the widest spectrum of publicity with all three Slovak television stations broadcasting 400 spots and radio airing another 400 spots.

*For Partners whose organizations were not well known among the media, having a celebrity(ies) associated with the campaign proved beneficial.*

Your media strategy can build the confidence of potential corporate sponsors. In Slovakia, the media plan was instrumental in convincing many corporate sponsors to participate in the campaign. CSF was able to provide executives with specific information on the level of media exposure each company could expect with its proposed level of donation. The agreements with major media for free airtime or space and event coverage were in place before businesses were approached, so CSF knew exactly how much it could offer to each company. In this way Slovakia exercised a basic principle of a good partnership: reciprocity.

Partners used a variety of vehicles, not only mass media, to create awareness about their campaigns such as:

- Ecuador: Used the colors of its major sponsor, MasterCard, on its promotional materials. MasterCard mailed information on the campaign to its 14,000 cardholders. Another company produced 50 billboards on the campaign, which were displayed on major roads in the country.
- Israel: Convinced a national airline company to run a short clip on the campaign during flights to mobilize awareness and support.
- Germany: Created postcards for public places and print advertisements in which well known German celebrities made puns about their line of work (professional soccer, high fashion, etc.) to attract public attention to the campaign

## Reach Individuals

To make the campaign meaningful and real to individuals, Partners used other communications strategies to complement their mass media efforts. To motivate people to act, not just to be aware, other communications vehicles were needed, as media alone was not always sufficient to get people to make a corporate or personal commitment. Some of the ways Partners brought their campaigns closer to people included:

- School children in the Philippines sold buttons to raise money for the campaign and flyers were distributed by civic associations.

- In addition to a national telethon with Czech Television, there were musical and cultural events throughout the Czech Republic to mobilize people. Local NGOs that would benefit from the campaign appeared at these events.
- The Philippine Basketball Association donated a set amount for each point scored in the last 2 minutes of every game, which resulted in \$6,250 for the campaign. It also generated additional media coverage.
- Youth organizations in Ecuador organized a "peaceful takeover" of several media outlets, complete with entertainment by clowns and high school choirs, during which they carried out interviews and interrupted programming to ask people to get involved.
- The Stars restaurant chain in the Philippines promoted the campaign inside its restaurants and secured \$17,890.

Most Partners opted to reach individuals at their places of employment so their communications relied, to some extent, on making the best use of workplace communications vehicles. There, Partners developed more personalized methods of communicating with employees through outreach by campaign "captains" within the company, events, videos, email reminders, brochures, and posters. Partners in the Philippines and the Czech Republic brought their campaigns to individuals where they lived and learned, not only worked.

If you decide to target several audiences, you need to consider a wider array of communications methods and tools. Typically, this requires more planning, designing, time, and resources. This extra effort might pay off for your NGO if it can mobilize the talent and resources to plan and implement a more complex communications strategy. It also might make sense if your NGO's longer-term goal is to build support among a diverse and growing number of individuals and institutions. It depends on your campaign goals and organizational capacity. For most IYF Partners, as this was their first fund raising campaign, they chose to limit their audiences to employers and employees and thus, concentrate their efforts. In future years, they have the option of continuing to concentrate on this target audience or diversify to include new segments of the general public.

*... you need to determine the goal(s) of your campaign to determine whether or not you want to target multiple or specific segments of society.*

# BUILDING RELATIONSHIPS WITH CORPORATE PARTNERS

*For Partners, in-kind contributions of public relations services and media spots were invaluable.*

For most Partners, a fundamental strategy for mobilizing funds was to recruit and involve businesses<sup>1</sup>. By building relationships with companies, Partners sought to: 1) mobilize donations and in-kind support, and 2) reach thousands of individuals, namely company employees. For NGOs with limited resources and time, finding efficient ways to reach large numbers of people was critical. It also was logical to target employees since the campaign played on the theme of donating the equivalent of an hour's wage or more. Some Partners also leveraged their relationships with companies to reach another set of individuals: the companies' customers.

Different ways for companies to participate in your campaign include:

## **Underwriting Sponsor**

A company provides funding to cover administrative costs, including salaries, materials, and event costs. This can be a pre-arranged lump sum or can be based on a percentage of the estimated overall costs to run the campaign. Securing sponsors was critical to all Partners.

## **Supporter**

A company agrees to promote an employee based-campaign. It also might commit to matching employees' donations or to providing an outright grant. You will want to advocate for either one of these options in your negotiations.

## **In-Kind**

In order to reduce costs, a company donates products or services the campaign needs such as phone lines and bank advertising services. For Partners, in-kind contributions of public relations services and media spots were invaluable.

## **Cause Related Marketing**

This strategy associates the campaign with a product or service produced by a company. Consumers are drawn to products that benefit or promote a social cause, and therefore to the companies which make those products. An increase in sales signals consumer appreciation for the company's commitment to social causes. Be sure that you are clear about the value of your organization's name and reputation. Make clear to the company what you want to receive in return. Is it funds, free promotion, both? You need to be confident in your negotiations

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<sup>1</sup>For more information on issues and strategies concerning NGO-company partnerships, consult *Growing your Organization: A Sustainability Resource Book for NGOs*, International Youth Foundation, 2000.

that you bring the company an asset that will enhance consumers' loyalty, recognition, and/or admiration.

Fundação Abrinq relied upon its established identity and credibility to recruit its corporate supporters, 90% of which were new contacts at the start of its campaign. Fundação Abrinq gave the companies the option to run an employee-based campaign or to do cause-related marketing, whereby earnings from a percentage of products sold would be donated to the campaign. Abrinq estimates half of the \$248,000 raised in 1999 came from cause-related marketing.

Fundación Esquel-Ecuador's partnership with MasterCard had various dimensions. First, the company made a cash donation. As mentioned earlier, the company also sent information about the campaign along with a method of payment slip to its 14,000 cardholders. Third, Mastercard pledged a percentage of purchases charged to MasterCard to Ecuador's campaign.

In the Philippines, a milk company placed the campaign logo on its letterhead and an automobile services company donated a percentage of each liter of gas sold during one month to the campaign.

Use your board members, steering committee, staff, and friends to identify the businesses you want to cultivate. In your campaign plan you identified how many companies you hoped to contact and recruit for the campaign. You will find, as did Partners, that you will need to continuously revisit your list of targeted companies to expand it as 1) some of your top prospects do not commit, or 2) as you succeed with your recruitment efforts and need to reach out to more companies. To develop your list of company targets consider these criteria:

- **Similar targets:** Look for companies targeting the same "market" as your campaign. It might be parents or teachers or environmentally conscious citizens. If it is parents, for example, then make a list of companies that target this segment of the market. For Partners it might be companies producing sports equipment, health products, educational toys and games, or particular food products.
- **Growth:** Consider companies that are expanding their markets and might be open to showing their appreciation to consumers by "giving back" to the community.
- **Track record:** Identify companies that have a pattern of being socially responsible.
- **Competition:** Your campaign might help a company differentiate a product or service that is facing stiff competition.

*Use your board members, steering committee, staff and friends to identify the businesses you want to cultivate.*

- Association: Go to your public relations and accounting firms and see if they will open doors with any of their business clients.

Consider pursuing companies until you have secured a key underwriting sponsor and/or supporter in each industry. In Ireland, for example, the campaign divided the private sector into its various industries and assigned a team to pursue each industry.

As you develop an effective pitch for your potential corporate partners, consider these tips:

- State the purpose of the campaign with conviction and enthusiasm;
- Be forthright about the benefits to the company;
- Be clear on how the company may participate;
- Emphasize the credibility, effectiveness, and reliability of your organization;
- Make sure you differentiate your campaign from any others; and,
- Be clear about the type of support the campaign will offer to the company whether it sponsors, provides a grant, and/or supports an employee-based campaign.

To recruit a company you will want to secure a meeting with the CEO or another top decision maker in a company. Partners did this by 1) enlisting board and steering committee members or other influential friends to gain access to company presidents, or 2) sending a personalized letter to the president, signed by the campaign chairperson and/or NGO executive director which was followed up by a telephone call. As one would expect, Partners had the greatest success in gaining access to companies in which there was prior personal or professional connection through their board, steering committee, or another supporter. Having a board member present for the first meeting proved vital for attracting companies that had no prior relationship with the NGO. Equally critical are professional looking and sounding staff presentations and well designed and written campaign materials, tailored to a business audience.

Persistent follow up after these initial meetings and presentations can make the difference as to whether or not a company commits. Slovakia is one example of doggedness. After an initial contact, Slovakia's ten part-time workers called executives regularly to get an answer as to whether or not the company would participate. When you are operating on a tight timeline and have not a minute to waste,

*Partners had the greatest success in gaining access to companies in which there was prior personal or professional connection through their board, steering committee, or another supporter.*

knowing when to abandon a target is also important. Ecuador found that it took an average of five contacts and multiple follow-up telephone calls to secure a commitment from one company.

During its two-month campaign, Fundação Abrinq recruited 29 companies including large corporations like Nokia and BCP Telecommunications and small companies. One restaurant chain donated 10% of an entire week's worth of meals sold. Thirty-eight beauty parlors in ten cities gave one day's worth of their revenues.

## Involving the Public Sector

Another set of institutions you can target for your campaign is public sector agencies. As with companies, the public sector can provide you with vehicles and opportunities to reach hundreds of people. Government units also can directly support your campaign by making donations of cash or in kind contributions and hosting promotional events.

- 23.4% of Ecuador's campaign contributions were from public sector sources;
- Ireland raised \$5 million, of which \$2.3 million came from the government.

Where Partners already had good access to the government, they tended to build on these to further their campaign goals. On the other hand, for Partners with few established working relationships with the government, this sector was of relatively little importance to the success (or failure) of the campaign. Brazil's Fundação Abrinq, for example, does not receive funds as a matter of policy from the government; therefore, this source was not important to the campaign. Conversely, the Children and Youth Foundation of the Philippines' program for disadvantaged children relies on close coordination with inter-agency public agencies at the local level. During the Filipino's campaign it made sense to involve the local government leagues and National Movement of Young Legislatures to promote the campaign and contribute. Since the mid-1990's, the Polish Children and Youth Foundation (PCYF) had cultivated strong relationships with local governments around education issues. Leveraging the goodwill PCYF had in place to support the campaign was not difficult. Local governments cooperated with press conferences, public endorsements, and by promoting the campaign among employees. Public officials serving as campaign patrons or chairpersons, as cited earlier, can also give the campaign a lift. Each NGO needs to consider, given its political climate, whether and how best to involve public sector units and officials<sup>2</sup>.

*Each NGO needs to consider, given its political climate, whether and how best to involve public sector units and officials.*

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<sup>2</sup>For more on involving government officials in your organization's sustainability efforts, consult *Growing Your Organization: A Sustainability Resource Book for NGOs*, International Youth Foundation, 2000.

# MANAGING AN EMPLOYEE CAMPAIGN

This section addresses some of the elements and steps needed to conduct a successful campaign inside the companies that have agreed to promote the campaign among their employees. With each company your organization will need to negotiate a plan and timetable of activities and steps to secure individual donations. The Philippines advises NGOs to develop a calendar of activities with each company so that you build momentum, leading up to the time when funds are collected.

*The success of a company-based campaign will depend greatly on whether or not the company communicates its commitment to its employees*

Key to mobilizing employees is the choice of company campaign coordinators. They usually are the heads of the human resources, finance and/or public relations departments. Depending on the type of participation the company chooses, your level of interaction with these departments will vary. Human resources will be key to promoting the campaign among employees and finance will help construct appropriate donation mechanisms. You also may be involved with the public relations department to help the company promote its image as a good corporate citizen. Whoever your counterparts, you want to build a good working relationship and support the extra efforts they are putting into the campaign.

In developing your relationship with the human resources and public relations departments, you should build on the company's existing internal communications. You can support their promotional efforts by drafting a letter from the CEO to employees or providing brochures and other written materials to be distributed in the workplace. You can also work with them to have your spokesperson make a personal appearance at a media attended company function, such as a community service fair or an annual picnic. Partners helped enhance the companies' communications by providing standard tools such as template letters, graphics, posters, emails, videos, buttons, pencils, and other promotional materials.

Slovakia, for example, contacted the human resources or public relations departments once the president agreed to run a campaign, to determine how to communicate the campaign to employees. Companies utilized e-mail, events, or articles in company newsletters to motivate employees to contribute.

The success of a company-based campaign will depend greatly on whether or not the company communicates its commitment to its employees. It helps if senior management contributes and promotes the campaign by wearing the campaign buttons or encouraging participation at staff meetings. Having promoters or captains inside the company is very helpful and your staff will want to cultivate and support them.

According to Fundación Esquel-Ecuador, a good captain(s) made all the difference in whether employees gave or not. They can generate excitement and even create friendly competition between different divisions of the company.

## Collect Contributions in a Safe and Convenient Manner

A key to your success in collecting funds from people—whether a company president, employee, or another individual, is to make it convenient, easy, and safe.

### Collecting from Employees

You need to establish a timeline for collecting contributions from the employees of each company. To determine the best time to collect funds, Partners conferred with the human resources and finance departments. Some companies may opt to collect donations during a particular week or day. Others may give employees a wider time frame in which to donate. Depending upon the length of your campaign, you will want to figure out the best way to create momentum so that you achieve a high contribution rate.

Most companies used payroll deduction, with the most difficult hurdle being getting people to take the time to sign the paper authorizing the deduction. Remember, you will want to make the donation process as simple and streamlined as possible to facilitate employees' fulfilling their pledge to give.

Payroll deduction can be the easiest method for your NGO to collect individual donations, given that the company's finance department can give you their donations in one lump sum. You will want a list of the individual employee donors so you may add them to your organization's database. Partners found that many companies were not willing to share the names of individual donors for reasons of confidentiality. Try to find a creative way to identify who contributed so that they can be personally thanked. Payroll deduction is also convenient for issuing receipts if local tax laws allow for charitable deductions, and your organization should be prepared to provide these receipts.

Be prepared, however, to offer companies advice on how to establish a payroll deduction system for donations if it is not common practice. In Slovakia the campaign was the first time companies introduced this innovation and CSF had to provide assistance to companies on

*Try to find a creative way to identify who contributed so that they can be personally thanked.*

how to make payroll deductions work. You should offer companies other options for collecting donations as well. In Ecuador for example, 97.3% of funds were received as individual checks as a payroll deduction system was not feasible. Many societies are cash-based so designating a 'collector' or a safe drop-off box also will work for collection. Some countries found that because employees were paid in cash or not were inclined to use credit cards or checks, locked boxes needed to be provided in the workplace.

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### **Collecting from Individuals**

Partners used a variety of methods to collect contributions from individuals who were not involved in employee-based strategies and wanted to participate. Again, these methods worked to the extent that individuals: 1) were aware of the campaign through Partners' communications efforts, 2) felt motivated because the campaign reached them in a meaningful way, and 3) the method was convenient and reliable.

The collection methods included:

- Collection boxes at schools, restaurants, banks, and other locations;
- Collection envelopes on airline flights and at events;
- Charges against their credit cards or telephone bills;
- Phoned in donations during a telethon;
- Deductions using an automatic teller;
- Checks or cash collected from individuals at events (e.g., raffles, dances, concerts, sports exhibitions, artistic performances); and,
- Round up collections when consumers paid for goods or services.

### **Specific Examples**

- In Slovakia, the phone company provided a special number for customers to call. They listened to a 25 second message from a spokesperson celebrity and could charge a designated amount to their next telephone for the campaign.
- In the Czech Republic individuals phoned in their pledges during a national telethon. People in villages could send their contribution through the post office as a money order.

- In the Philippines, highly visible and secure collection cans were placed in department stores and restaurants.
- In Mexico and the Philippines, people were asked to round up their hotel bill when they checked out. The rounded amount was donated to the campaign.
- In Slovakia, at designated automatic teller machines (ATMs), a sticker displaying the campaign logo let customers know they could donate through the ATM.

Online giving is growing as a method for contributing but still faces questions in terms of security and reliability. As of this writing, there are no "best practice" models to cite, simply due to the lack of specific examples in this area. Larger corporations may have such a mechanism in place, but there is still some reluctance among the public to trust this approach.

# REPORTING CAMPAIGN RESULTS AND LOOKING TO THE FUTURE

*While you have indicated during the campaign which program areas the funds raised will support, showing people the results they helped bring about is your most effective tool of communication.*

By the time you reach this phase of the campaign you will have created a campaign brand, mobilized the public, built partnerships with corporations, and collected contributions. By now your organization's "stock" should be very high and you want to preserve the trust and positive identity you have nurtured. To do this, two steps are critical—acknowledging and thanking your many supporters and giving an account of what you raised and how you spent it. Once you have done these things you will want to see how you can leverage the relationships and brand you have built to increase your organization's sustainability.

## Acknowledge and Thank

You will want to thank every person and institution that helped make the campaign a success. Depending on who you wish to acknowledge you may do it individually or collectively. Remember, the message should reflect the audience. You also should consider using some of the same communications vehicles to thank people that you used to mobilize them. Company presidents, for example, probably will expect a personalized form of acknowledgement and some form of public recognition. You might send them a personalized letter of thanks or pay the company a visit and publicize the company's vital role in a press release. In Brazil, for example, Fundação Abrinq thanked individuals by running an advertisement in major newspapers that also included the logos of its major corporate sponsors. The executives of Mastercard in Ecuador were given a serenade at their headquarters as a way of thanking them for their support to the campaign.

Acknowledging peoples' contributions should be done as quickly as possible. You do not have to wait until the campaign is over. Partners also advise NGOs to personally thank the many people who volunteered their time to the campaign from volunteers working in your organization to professionals who donated their time to campaign captains within companies.

## Report on How Funds Were Spent

You are accountable to your donors. You should report to them what you have done with their money so they will feel comfortable enough to support you again. While you have indicated during the campaign which program areas the funds raised will support, showing people the results they helped bring about is your most effective tool of communication. Results should be published in newspapers and shown on

television. Your media partners will have a vested interest in promoting their own social responsibility by getting this information to the public. Aside from a written report disseminated through your website and in the mail and website-distributed financial statement, you should provide data on how lives were improved. Make a video to document your work, have a child who has benefited write a letter to the CEO of one of your sponsors, or take the press on a tour of a program the campaign supported.

Slovakia used a two-hour prime time television slot on December 6, 2000, also known as St. Nicholas Day, to publicize its results. With the help of celebrities, the lively broadcast included upbeat short films highlighting the programs which benefited from individuals and institutions' generous support.

In the Czech Republic, the Civil Society Development Foundation, NROS, broadcast documentary films about the people supported by the 1999 campaign during the promotion of their 2000 campaign. NROS thanked donors during the broadcast, in its annual report, on its website, through letters, and through, a media campaign launched by one of NROS' corporate partners.

## Leverage Results

The effort your organization will invest in a campaign is considerable as IYF Partners' experiences illustrate. Once you have created a strong identity for the campaign, you may decide to repeat it for several more years or make it an annual event. Even if you do not repeat the campaign you want the benefits to be long lasting. You can achieve longer-term benefits if you consciously build on the relationships, good feelings, and partnerships created as a result of the campaign. For every Partner, even those deciding not to repeat the campaign, the campaign heightened their credibility and raised awareness about children and youth issues. The question they had to ask themselves is, "now that more people know about our work, what can we do next?" Rather than go back to business as usual, each organization had new opportunities to:

- Create continued press coverage of issues important to their missions;
- Keep individual donors informed and engaged with the NGO; and
- Find more ways to partner with companies and government units.

*Once you have created a strong identity for the campaign, you may decide to repeat it for several more years or make it an annual event.*

*The first step toward nurturing the new relationships formed during a campaign is to acknowledge individuals and institutions' support.*

In other words, each Partner gained new relationships that it could either nurture or allow to languish. For any relationships that are important to your cause, Partners' advice is to nurture them.

The first step toward nurturing the new relationships formed during a campaign is to acknowledge individuals and institutions' support. The second is to report on how funds are invested. You will need a good database to track contributions during the campaign so that you can stay in contact with these supporters in the future. It is up to your organization to decide how and when it will maintain contact with whom. Partners mobilized contributions from thousands of individual contributors. For Partners to maintain contact with each individual is a serious challenge. Some have plans to stay in touch with individuals through direct mail (if they obtained their addresses) and/or events; others are still weighing the cost/benefit of trying to reach the individuals who supported them.

Nurturing the relationships forged during the campaign with media, companies, and government units is equally important and may prove more efficient than keeping in touch with hundreds of individual donors. Your success in gaining their attention and support in the future will depend upon how positively they perceive your organization and/or your campaign brand.

The Irish Youth Foundation, for example, sent a solicitation letter in 2000 to the companies participating in the 1999 campaign. To the Irish organization's delight companies responded very favorably, donating approximately \$225,000. One reason is that the brand value of the 1999 campaign was sufficiently strong in the eyes of these corporate leaders as to prompt them to invest again.

Fundação Abrinq's relationships with several companies began during its 1999 campaign. Because of the trust it created during its campaign, several new companies agreed to join its Child Friendly Company<sup>3</sup> program, which works for the eradication of child labor. In this case, Fundação Abrinq provided these companies with another option and reason to strengthen their relationship with the NGO.

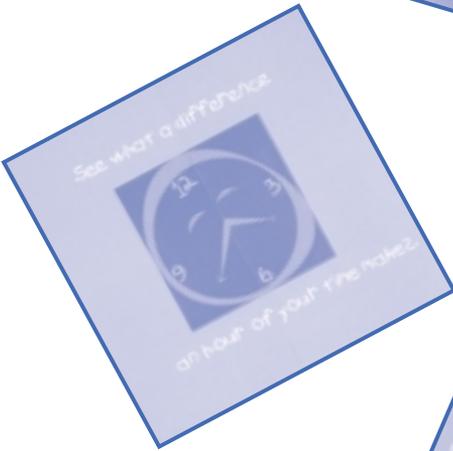
The corporate relationships built with the private sectors are important to the Slovak's and Filipinos' long term strategies to mobilize local financial resources. Both organizations are experimenting with innovative ideas to generate new income through strategic alliances with selective companies. Their top candidates for strategic partners happen to be companies they cultivated during their 1999 campaigns!

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<sup>3</sup>Fundação Abrinq created a seal that identifies a company as being committed to the fight against the exploitation of child labor and as an investor in projects that improve children's lives. If the company is approved, it can use the "child friendly company" seal on its letterhead, advertising, and packaging. In addition to more donations to Fundação Abrinq for its programs, the seal promotes Fundação Abrinq's name, logo, and message about child labor and the importance of children's rights to the public in a very visible and consistent way. Child Friendly Companies believe that by putting the seal on their product packaging, they will increase sales and consumer loyalty.



**children's hour**  
 Give an hour, change the millennium  
 An initiative of the Irish Youth Foundation



See what a difference

an hour of your time makes



la hora de los niños  
 con usted

**Gracias**

Producción Esquel,  
 agradece a todos sus colaboradores de  
**BANCO BOLIVARIANO**  
 por darle la hora a la educación  
 de los niños empujando en el nuevo milenio



# CONCLUDING TIPS

## **Plan your Campaign**

Take time to define your campaign goals, and the internal structure, strategies, mechanisms, and timetable to reach these goals. Do your homework to know your competition; learn from their successes and mistakes. Campaigns involve the management of dozens of details so anticipate the multiple steps you will need to follow and prepare well.

## **Keep an Eye on Costs/Benefits**

Calculate your costs carefully, that means being realistic about what it will take to reach your campaign objectives. Develop your list of fund raising and sponsorship targets. Keep going back to your budget and income targets to see what percentage of your costs will be covered through donations. If you think you are going to "lose" money by conducting the campaign, stop and assess whether to scale back, refocus your efforts to secure sponsorships, or suspend your campaign. The latter may not be an option if you are too far into the campaign. The point: control your costs, secure your donations early, and keep reviewing your projections and adjust quickly.

## **Mobilize Resources to Cover Campaign Expenses**

Most people want their money to go directly to the social cause and not to pay for campaign costs. Your appeal is stronger if you can promise people that their funds will be used to support programs, not campaign expenses. For this reason, Partners focused considerable attention on lining up their sponsors so that the costs of running the campaign were covered. As mentioned earlier, Partners were successful in mobilizing support from businesses, media, and government sponsors.

## **Allow for Enough Time**

One of the most frequently cited lessons from the Partners' campaigns was that they did not allow enough time to fully realize their goals. With more time to cultivate corporate and government donors, for example, the Philippines felt it could have mobilized more funds. Creating the basic infrastructure to manage a campaign—steering committee, implementation team, corps of volunteers, sponsors, and communications materials and vehicles—took much longer than anticipated. For example, it took Slovakia almost nine months to get all of the pieces in place (e.g., steering committee, internal team, sponsors, access to media, development of strategies) and to launch the campaign with full media coverage.

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### **Take Care with the Image you Create**

The campaign is only one aspect of your organization, but the image it conveys is inextricably linked to that of your organization. Supporters may not have known of your NGO prior to the campaign, but now the two will be closely associated. You may have chosen to develop a brand identity for the campaign that is distinct from your organization's, however, in the minds of the public, your NGO is accountable for how well the campaign performed and funds were spent. Your goal is to enhance your organization's image and visibility through the campaign, not tarnish it.

### **Be Distinctive**

Use your creative talents to think through how your campaign will be different from other campaigns and events. Remember there are many causes, appeals, and promotions that are competing for peoples' attention. Make the purpose of your campaign clear and compelling to the hearts and imaginations of your audiences.

### **Be Clear and Flexible**

Find a workable balance between being specific in your communications about how the funds you raise will be used, while at the same time, maintaining as much flexibility as possible. This can be a delicate balance. Partners had to communicate who would benefit from their campaigns in order to gain peoples' confidence. Some Partners cited the specific programs to be supported with the funds raised. Others opted for a more flexible approach, citing the types of issues they would support. Whenever possible, Partners advocate for allowing your organization maximum flexibility and avoiding pre-designating the specific beneficiaries or programs.

### **Don't Forget Your Administrative Costs**

A different, but related, challenge is covering the costs of managing the funds raised and projects funded. This involves staff time to review proposals, disburse and control funds, and monitor project activities supported through campaign funds. If you can explain to your supporters that you will use a percentage of funds raised for this purpose, that can be the best solution. For several Partners, however, this was not an easy option as they felt it would dampen people's motivation to contribute. Slovakia, for example, is covering some of its administrative costs through interest income. In the longer run it needs to modify its campaign messages so that the public realizes that a small percentage of funds raised needs to be set aside to cover management costs.

*Find a workable balance between being specific in your communications about how the funds you raise will be used, while at the same time, maintaining as much flexibility as possible.*

*IYF Partners' success in securing employee contributions was largely due to the dynamism of the company leadership and captains. . . Through the captains employees were continuously reminded about the campaign and motivated to commit.*

### **Keep Politics at Bay**

Several Partners enlisted high-level political figures as patrons of their campaigns. Poland invited the Speaker of the Parliament to serve as the campaign's honorary chairman. Because his official position is viewed as bipartisan, the Polish NGO reasoned that his involvement would not politicize the campaign. In fact, his presence helped attract contributions from businesses who felt that their image would improve in the eyes of the Speaker if they, too, lent their support. There are risks to having a public figure, as from one year to the next their association to your campaign can become a liability. Therefore, make sure any political figures are perceived as non-partisan and understand their role as lending prestige to the campaign.

### **Manage Celebrities Well**

In recruiting celebrities to work with you, try to be as clear as possible about what you need him or her to do and how much time you will need. A person who lends his or her name but is not available for personal appearances and interviews will not be very helpful. Try to match the celebrities' availability with the appropriate task. A celebrity with very little time might provide a quote to use in your campaign literature and record a message for a radio spot. Those with more time can make appearances, do interviews, and participate in a campaign video.

### **Sensitize, Personalize, and Realize**

Partners used the media to create awareness about the campaign and their issue. Through creative use of broadcast and print media, thousands of people were sensitized about their campaigns. Sensitizing, however, was not enough for Partners doing first-time campaigns to motivate people to reach into their pockets to contribute. Partners learned that in addition to working with the media, they needed to find ways to bring the campaign into people's lives, that means their workplaces, community, schools, and places of recreation, as much as possible. Some type of personal touch, especially for a new campaign and in places where people rely on face-to-face contact to feel that they can trust you, is important. Your campaign activities may include publicity at sporting events, promotional activities at work and schools, outreach to civic groups and networks, and events.

## **Support Campaign Volunteers**

IYF Partners' success in securing employee contributions was largely due to the dynamism of the company leadership and captains. The leadership made people feel the excitement and pride of being part of a corporate effort to be socially responsible. Through the captains, employees were continuously reminded about the campaign and motivated to commit. Recruiting energetic campaign workers, whether work or community-based, is a critical ingredient for success. Be sure to keep them engaged (send them brochures, event ideas, buttons, email reminders, bring them together) and let them know how vital they are to campaign. Review reference materials or websites on volunteer management to refresh your memory on good techniques for keeping your volunteers satisfied and high performing.





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