



Campaign Manual

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Introduction

You have the opportunity to design a successful and fun campaign that fits your company's culture. A workplace campaign can be a great team builder and morale booster if done right. Below are some steps to take to design your campaign. Remember, EarthShare federation representatives and our national network is available to help you set up the campaign.

This guide has been created by EarthShare to help you plan and organize your employee workplace fundraising campaign. It is intended for three possible audiences:

- For the campaign coordinator at a company that has never run a workplace giving campaign.
- For a campaign coordinator new to his/her company's campaign, or
- For an experienced campaign coordinator who is looking to revitalize or expand his/her existing campaign.

This guide includes some of the best practices of successful campaigns. We recognize that one guide cannot fit all. You should use this guide as a tool and customize your campaign to fit your corporate culture, size, and special needs.

About EarthShare

EarthShare is a nationwide network of the world's leading environmental and conservation charities, serving your community locally, nationally and internationally. Its organizations work to safeguard human health and the environment by eliminating air, water, and toxic pollution; protecting wildlife habitats and endangered species; preserving our natural resources; and educating the public.

EarthShare has 13 licensed [state partners](#): EarthShare of California, EarthShare of Georgia, EarthShare of Illinois, EarthShare of Michigan, EarthShare of Missouri, EarthShare of New England, EarthShare of New Jersey, EarthShare of New York, EarthShare of North Carolina, EarthShare of Ohio, EarthShare of Oregon, EarthShare of Texas, and EarthShare of Washington. These partners represent all of the [national members](#) of EarthShare as well as local environmental charities that operate principally within their states.

Components of a Successful Campaign

Ultimately, a campaign is only as successful as the employees who participate. Following are some components that will help motivate employees and make your campaign a success.

Develop Strategies for the Upcoming Campaign

In developing the strategies for the upcoming campaign, first you need to know your budget. You also need to know the number of employees included in the campaign so you can determine the number of volunteers needed to run the campaign. Once you have determined those numbers, you may proceed with the following:

- Choose the campaign theme - capitalize on current trends from the movies, music world or sports; or select one drawn from company history, culture, or interests.
- Design the structure of your employee campaign team.
- Set campaign dates and create a campaign timetable.
- Decide on campaign activities and events.
- Consider including retirees in your campaign as donors and volunteers.

Set Goals

In developing the strategies for the upcoming campaign, you need to know your budget. You also need to know the number of employees included in the campaign so you can determine the number of volunteers needed to run the campaign. Once you have determined those numbers, you may proceed with the following:

- Know your organizations' culture, plans and constraints - be cognizant of developments like downsizing, restructuring, mergers and acquisitions.
NOTE: Holding a campaign during a rough time can be a great way for employees to come together for a good cause. It can be a good team building exercise.
- Set goals that are achievable and measurable, yet challenging.
- Goals may be set on overall dollars, dollars by department or division, participation rate, average gift, and/ or per capita gift.
- Publicize goals so that employees know what they are aiming for.
- Decide how goals will be set - by company or operational units.

Donor Focused

- Give employees a wide variety of charitable choices.
- Supply the employees with informative materials that encourage the potential contributor to support the campaign.
- Employ an easy-to-use pledge form - the simpler the form the easier it will be to make a pledge.

- Identify key people at the worksite who have been helped by participating charities or who volunteer and know the programs well.
- Guarantee the campaign is accountable and has a reputation for integrity (i.e. issue a report detailing how the money was pledged; allow for donor acknowledgments).
- Personalize the pledge card with the donor's name (optional).
- Provide adequate time for employees to attend kick-offs and other events.

Top Endorsement and Involvement of Management

- Have the CEO or other senior manager publicly endorse the campaign by letter or other means.
- Have senior management attend the kick-off/training and encourage them to make their pledges at the kick-off.
- Encourage top union leadership, if applicable, and encourage them to be key participants in a campaign which benefits everyone.
- Encourage employees to participate, but always stress that it is a voluntary giving program.

Follow-up during Campaign

The #1 reason people don't give is that they were never asked! It is imperative that all employees be given an opportunity to contribute and be given adequate information to make an informed choice. To accomplish this:

- Utilize report forms which list everyone's' names to ensure follow-up has been done.
- Encourage periodic check-ins with Key Workers by the Campaign Coordinator or Campaign Managers (have materials arrived? are there questions? how is the campaign going? and finally, the thank you for a job well done).

Publicity

The most successful campaigns advertise the campaign well before it kicks off and continue to use visible reminders throughout the campaign and year-round. Using posters, progress thermometers (or some other item identifiable to the organization or campaign theme, such as a race track for a car company, or a stack of books for a publishing company), E-mail messages, campaign newsletters, table tents in the cafeteria or lunch room, campaign kick-offs and other promotional events will help make the campaign more fun and successful.

Incentives

Incentives to stimulate participation and giving are also helpful. One company organized a lottery for every employee donating a minimum of \$8 per pay period or \$208 per year. The prizes included an expense paid vacation, free airline tickets for two, a priority booking for a one-week stay at one of the company's condos, and a five-day car rental. Larger companies with sizable divisions or branch offices may want to encourage those groups to offer local incentives and to hold local events.

Food is a great motivator! Use free food like donuts and cookies to encourage attendance at campaign events.

EarthShare has local affiliates or field directors who can assist in training, attend events or meet with employee groups. They can support your local offices by working with the campaign coordinator.

Following is a list of possible incentives:

- Dinner with Campaign Chairperson or Branch Manager.
- Services rendered by the Chairperson or Branch Manager - car wash, meal cooked and served, etc.
- Employees with special skills donate their services - meal cooked and served, oil changed in car, baby-sitting services, artwork produced, etc.
- Lottery tickets, plants, public transportation pass.
- Turning pledge forms in first, e.g. for first 100 pledges received.
- Mention in newsletter.
- Recognition breakfast/lunch for leadership givers.
- Opportunity to play tennis or golf with a professional, or lessons.
- Free use of corporate or executive's vacation home or condo for a weekend.
- Gift certificates for ice cream, a restaurant, night on the town.
- Tickets to sporting events, concerts, plays.
- Gift certificates donated by local vendors.
- Airline tickets.
- Company stock.
- Raffles and door prizes. (EarthShare can provide an assortment of these.)
- Preferred parking space for a week/month/year.

Events

Campaign events stimulate interest in the campaign, make it more fun, and encourage employee involvement. You may include educational events to help employees learn more about the participating charities such as charity fairs or brown bag lunch presentations by representatives of participating charities. You may want events that bring employees together like a picnic or group volunteer opportunity. Below are some suggested events:

- Charity fair.
- Campaign kick-off party or rally.
- Talent Show.
- Trivial Pursuit marathon.
- Brown bag lunch presentations by charities.
- Golf putting contest.
- Pie or ice cream eating contest.
- Ice cream social.
- Company picnic including families.
- Volunteer day.
- Car wash.
- Baby photo contest- Display baby photos and have employees guess who's who.

Events are a great way to make the campaign fun and to draw attention to it, but don't forget that the main purpose of the campaign is to offer employees the benefit of donating by payroll contribution. This form of giving allows employees to give more than they could if they had to make a one time donation - up to five times more - and it comes painlessly out of their paychecks in reasonable increments.

Potential Campaign Pitfalls

Pressure

Employees should be encouraged to give through education and motivation. At the same time, reassure them that it is okay not to give. The campaign is ultimately about choice which includes the choice not to give. Even the smallest donations are appreciated. Remember, employees that don't give this year, are potential donors for the next.

Confidentiality

Every effort should be made to keep the pledge information confidential and to have as few eyes as possible see them. Employees should be reassured that the information on pledge forms will be kept confidential. Employees' names and addresses should be forwarded to participating charities **only if** the employees request acknowledgment.

Technology and Passive Campaigns

Technology can be used to make a campaign run more smoothly, simply, and efficiently. Use E-mail to send information to employees such as data on the charities, dates and times of campaign events, and campaign progress reports. There are now many ways to collect pledges using technology like computerized pledge forms, telephone pledging systems, pledge scanners, etc. Technology should be used for these types of activities.

However, there is no substitute for the personal touch and good communications. **DO NOT** let technology take the place of personal solicitation. Passive campaigns are doomed to fail. Keep the campaign active and fun.

Lack of Information

Employees who are informed and educated about the campaign participants are more likely to give and give generously. At the very least, each employee should receive a listing of participating charities that includes a short description and phone number so they can call for more information. Charity fairs and guest speakers from participating federations or charities help to inform employees about where their money is going.

Opportunity to Give

The number one reason why employees didn't give is because they weren't asked! Be sure that every employee is given at the very least a pledge card and a brochure listing all the charities and a short

description of each. In addition, they should receive adequate instructions on how to fill out and return their pledge forms.

Campaign Team

CEO and senior management commitment to the campaign is vital. They can show their support in a number of ways including:

- Sending a letter to each employee either in their pay envelopes or separately.
- Putting a memo to the employees on the Intranet or send a broadcast email.
- Writing an editorial in the company's newsletter.
- Attending the initial campaign meeting.
- Choosing chairpersons in branch locations to lead those campaigns.
- Filming a lead-in to the campaign video.
- Making a "pacesetter" donation prior to the start of the campaign.
- Attending the campaign kickoff.
- Allowing employees time off to attend campaign events.
- Encouraging employee involvement in the campaign.

Campaign Chairperson

A Campaign Chairperson should believe in the value of the campaign and have good rapport with most of the staff and/or be well respected. He/she and his/her campaign team should be organized and detail-oriented.

If the CEO is playing an active role, then he/she can become the Campaign Chairperson. Especially in larger companies, the CEO often chooses a senior manager to act as Chairperson and oversee the campaign on his behalf. If not, the campaign committee may choose one. In companies that are very large and have a number of off-site branch or division offices, a Chairperson may be chosen for each branch or division.

Chairperson

Responsibilities:

- To endorse the campaign and show company support for the campaign.
- To motivate employees to want to give.
- To attend the kickoff.
- To thank key employees.

Campaign Coordinator

The Campaign Coordinator is the glue of the campaign. The Campaign Coordinator often remains the same from year to year with the responsibility for the campaign included in his/her job description. Workplace campaigns are usually run out of Community Affairs, Human Resources, Foundation or Public Affairs. Occasionally, Payroll has the responsibility.

Often the Campaign Coordinator will form a Campaign Committee to help design the campaign and help with certain aspects of the campaign like publicity, organizing the kickoff, employee communications, etc. Basically, the Campaign Coordinator has the responsibility to organize the campaign from start to finish.

Responsibilities (can be done in conjunction with a committee):

- Set campaign timetable.
- Set campaign theme and goals.
- Pull together the campaign team.
- Communicate with employees.
- Set up training for Key Workers, and other campaign volunteers.
- Organize the Kickoff, charity fairs, speaking opportunities, etc.
- Decide on publicity for the campaign.
- Arrange for campaign materials to be sent by the participating federations or created specially for the company.
- Arrange for pledge collection and results reporting.
- Ensure that all of the participating employees and campaign team are thanked.
- Arrange for any recognition program.

Campaign Committee

Some Campaign Coordinators form a Campaign Committee to help them organize and run the campaign. Potential members of the committee include the Campaign Coordinator, the Campaign Chairperson, representatives from the divisions, someone from the Payroll and Human Resources Departments. Different members can be assigned to handle publicity, communications, tracking, materials, speaker, tour and kickoff coordination, training, etc. It might be useful to include a representative from each of the participating federations in the planning meetings.

Campaign Managers

In a large company, the Campaign Chairperson or Campaign Coordinator should recruit a senior manager from each department or division to fill the job of Campaign Manager. Campaign Managers are usually tasked with the responsibility of ensuring campaign effectiveness within their department.

Responsibilities:

- Choose Key Workers to canvass departmental employees.
- Be a motivational leader.
- Ensure that all Key Workers attend training.
- Attend kickoff and other events.
- Monitor progress of campaign within his/her department.
- Report results.
- Thank employees in his/her department.

Champions/Key Workers

The people chosen for this role will strongly influence the outcome of the campaign. They are the campaign "champions" responsible for visiting each employee to ask for a donation. The best candidates are employees who are respected by their co-workers and have leadership qualities. Ideally, employees should be divided into teams of no more than 15 employees per Champion. Any more will put too much

pressure on the Champion and not allow enough time for one-on-one solicitation. Also, consider assigning Champions to a peer group. Campaign Managers should canvass other higher level managers. This assignment should not be given to a new employee or as a punishment.

Champions have the unique role of canvassing each employee assigned to them to provide answers to their questions and to ask them to consider making a contribution to the charity(ies) of their choice. To be more efficient, a Champion may assemble his/her employee team at a coffee break, staff meeting, or other convenient time to show a campaign video on participating charities and answer the group's questions. Brochures and pledge forms should be made available at that time. A personal follow-up visit can then take place for those who did not respond during the group meeting.

Responsibilities:

- Attend solicitation training.
- Familiarize themselves with the materials.
- Distribute materials to employees assigned.
- Solicit approximately 15 employees each.
- Evaluate employee perceptions and interests.
- Communicate about participating charities.
- Speak honestly and openly.
- Promote opportunities to designate.
- Encourage payroll contribution.
- Ensure that all employees are educated about the campaign and given an opportunity to donate.
- Make personal visits until every employee has been contacted.
- Make follow-up visits.
- Find human interest stories/employee connections to charities to share with employees.
- Encourage participation by example.
- Collect employee pledge forms and transmit to Campaign Manager (or other appropriate source.)

Participating Federations

The participating federations, like EarthShare, are partners in your campaign. They bring a variety of resources and experiences that can help support your campaign. Following are some of the tools and services they can provide:

- Train campaign coordinators and key workers.
- Provide information on member charities.
- Help evaluate the campaign and plan for next year.
- Make motivating and informative presentations to employee groups or arrange for member charities to make presentations.
- Supply campaign brochures and pledge cards.
- Offer display materials such as posters, videos, photographs, etc.
- Provide some giveaways items such as T-shirts, mugs, pencils, bags, etc.
- Help identify vendors for fiscal agency and on-line giving.

Campaign Materials

Components of a Donor -Friendly Brochure

EarthShare, and other federations, can provide you with their brochures. However, you may want to create your own campaign brochure incorporating your company's campaign theme and goals. This is especially useful when there are a large number of participating federations or individual charities. You may also want to do an on-line directory and EarthShare can supply you with an electronic version of our list.

Attractive

- Make it uniform to some degree; do not use more than three different type styles.
- Treat participating charities equally.
- Use pictures.

Informative

- Include a statement of endorsement from the CEO and/or from the union(s).
- Answer frequently asked questions at the beginning of the brochure.
- List charities with a description, phone number and the percent of fund-raising and administrative expenses.
- If there are over 75 participating charities, carry an alphabetical index with their code number for easy reference.
- Provide examples of how contributions are used.
- Provide information on the previous year's pledged receipts and how they were divided among the charities.

Stress Important Benefits and Points

- Once a year charity drive.
- Donors choose where they want their gift directed.
- Company match, if applicable.
- Cost effectiveness for the charities.
- The convenience of payroll contribution giving.
- The low cost of the campaign, thanks to employee volunteers and the use of charity provided materials.
- Tax-deductibility.
- The gift will be acknowledged by the charity if the donor agrees to give his/her name and address for this purpose (many pledge cards can be designed for this added accountability feature)
- Donors may qualify for membership in selected charities
- Making a better world!

Pledge Forms and Reporting

You have several choices for pledge forms. For a combined campaign with two or more federations participating, it would be best to design your own pledge form. EarthShare can help you do that. The form should offer the choice of any of the participating federations, and space to designate one or more specific charities. The advantage of designing your own pledge form is that it can include your company and/or campaign name and logo, be personalized if you so choose, and conform to the needs of your payroll department and those responsible for tracking the results.

Pledge forms should be simple, easy to read, one page documents that can be copied; multi-paged with carbon for easy distribution; or made to be used in a scanner or other data reader. There should be a box for employees to check who wish to have their gift acknowledged and space to put their complete address.

Pledge forms normally offer employees three options for payment of gifts. Employees may:

- Use payroll contribution to have a set amount per pay period deducted from their paychecks, normally beginning January 1 and ending December 31 of the year following the campaign.
- Have a one-time contribution taken out of one of the first paychecks of the year.
- Give by check or credit card so that the tax deduction may be taken in the year of the campaign.

Those who will be responsible for the tracking and input of the pledge data should be included in the design of the pledge form and informed of the information needed by the participating federations and charities and their reporting requirements. If you want to post daily results, you will need to set up a tracking system and assign a person or team to collect and tally the daily pledges.

To properly distribute your employees' pledges according to their wishes, EarthShare will need at a minimum, the total amount pledged to it and each of its member charities, the amount raised in each state where your company has employees and the names and addresses of all employees requesting acknowledgment of their gifts, or who have pledged or given a single gift of \$250 or more.

Campaign Wrap-up

Recognition

Recognition, especially public recognition, is an important element of a successful campaign. Inexpensive items such as pencils or lapel pins with the campaign name on it can help build enthusiasm for the charity drive, as well as recognize those individuals supporting the effort. Many campaigns develop a "supergivers" or leadership givers program which recognizes very generous supporters or those who give above a certain dollar amount or percentage of their pay. Usually the premium given to these donors is something special that can be displayed with pride all year long.

Campaign Managers and Champions should receive a special thank you from the CEO and Campaign Coordinator. Consider presenting them with a certificate of appreciation, or a framed photograph taken at a campaign event.

Giving public recognition to a division or department which meets its goal is equally important. A plaque that can be hung in a public area, such as a reception area or cafeteria, is especially good. Some companies use a "traveling trophy" making for some friendly competition among divisions. Categories for recognition plaques include:

- Percentage of fund raising goal.
- Percentage of employee participation.
- Average gift per employee.
- Total dollars raised.

Be creative; have fun. And always thank those employees who make the campaign a success!

Post Campaign Follow-up

- Analyze the campaign within two months of its conclusion.
- Look at what worked and what didn't.
- Get employee feedback - did they like the campaign, were they solicited, did they give, why or why not?
- Conduct a campaign audit to be sure funds are properly accounted for and pledges are checked before they are given to payroll for contribution.
- Send participating federations detailed reports of results.
- Hold a full evaluation meeting with all of the campaign partners.

Appendices

Appendix A: Sample Letters

Sample Letter: CEO Endorsement (for a combined campaign)

The (name of campaign) supports many services which make our community and world a better place to live and work for ourselves and our families.

Sometimes we forget that many people need help to meet emergencies, how disabled citizens depend on therapy, why we need to support efforts that work for cleaner air and water, or how charities work in general to create better communities for women, children and minorities. Because of the many charities represented in our combined drive, our employees know we have a place to turn to when we need help.

(Use this paragraph if you are planning a group solicitation) (Name of company) will be having an all-employee meeting on (date) at (time) in (location) to kick-off our (name of campaign). Your gift, when combined with the gifts of other (name of company) employees will help keep our community and world a good place in which to live and work.

I want you to know that I fully support the work of the (name of campaign) and hope you will join me in giving from the heart.

Sample Letter: CEO Endorsement (for an EarthShare only campaign)

The (name of campaign) supports the work that EarthShare and its member charities do to make our community and the world a better place to live and work, for ourselves and for our families.

We need to support efforts to clean the air and water, create better, healthier communities for our families, conserve unspoiled land and habitats, and create of parks and recreation areas we can all enjoy. Because of the many environmental and conservation charities represented in our drive, you now have an opportunity to give broadly to the environment through one gift to EarthShare, or to areas of specific interest by designating your gift to one or more specific charities.

(Use this paragraph if you are planning a group solicitation) (Name of company) will be having an all-employee meeting (or event) on (date) at (time) in (location) to kick-off our (name of campaign). Your gift, when combined with the gifts of other (name of company) employees will help keep our community and world a good place in which to live and work.

I want you to know that I fully support the work of EarthShare and of the (name of campaign) and hope you will join me in giving from the heart.

Sample Endorsement Letter (for a combined campaign)

Once a year, we ask one another to invest in the quality of life in our community by contributing to the (name of campaign). That time is upon us again. Our friends and neighbors have needs that must be met if the community and our world are to remain healthy. Together, the participating charities of the (name of campaign) provide clean air and water, food, shelter, clothing, counsel, comfort or help in times of crisis.

When deciding the amount of your commitment, remember the (name of campaign) commits itself to you year-round. With your support, charities will receive the ongoing help needed to provide vital services.

The (name of campaign) is a proven performer. That's why (name of company) supports the 200x campaign, and why we hope you give from the heart.

Sample Letter: Volunteer Recruitment Thank You (signed by campaign chair or CEO)

On behalf of all of us involved in the (name of campaign), thank you for agreeing to be a key worker. Your willingness to be a leader in this combined charity drive is instrumental to our success. We have set an ambitious goal for 200x of \$XXX,XXX.

Because of my own personal commitment to the program, I want you to know you have my full support. (Employee name) has been assigned by me to be the lead liaison in the (department). Please work with him/her to ensure that we publicize the campaign and guarantee that anyone wanting to participate has the opportunity to do so. If you encounter any difficulties, please feel free to speak with (appropriate campaign volunteer). I know that with all of us working together, we can get the job done.

Sample Letter: General Contributor Thank You

Thank you for your generous contribution to the (name of campaign). You have helped to make your community and the world a better place to live and work for all of us.

Through your contributions, (company) raised \$XXX,XXX, a XXX% increase over last year. Our pledges will make a difference in the lives of thousands of individuals who rely on the charities that participate in the (name of campaign).

Again, thank you for your generosity and commitment to the (name of the campaign).

Appendix B: Tips for a One-On-One Approach

1. **Make your Pledge first!** Before you begin calling on your colleagues to encourage them to support their favorite charity in the campaign, make your own pledge. This way, you can let others know that you support the campaign. It is also a very good way to become familiar with the materials and the pledging process.
2. **Be Organized.** Block out a time for your calls and call ahead to your potential contributors to set up a mutually convenient time to meet. (Tip: Start with the colleagues you know best; this will build your pattern of success and give you positive examples of giving to which you may refer.)
3. **Be Prepared.** Review the campaign materials ahead of time. Be familiar with the participating charities. Understand how the pledge card is to be filled out; this will help facilitate your assisting anyone who needs help. Remember to take the brochure and pledge card with you when you make your call.
4. **Be Clear.** You are calling on this individual because the charities you are representing need his/her help and support. If you have some facts and figures ready on the amounts raised last year and how they helped, this will help make the case for their support. Be sure to point out that this is the only time of year that they will be solicited for a charitable contribution and that they can do so through the convenience of payroll contribution giving. If your company is offering

matching funds, this should be made clear at this time.

5. **Get a Commitment.** Try and get their support right away. If they cannot make a commitment at the time your meeting takes place, be understanding but stress that you will check back with them in "x" number of days.
6. **Thank You.** Whether your colleague supports the charity drive or not, ALWAYS say thank you. While he/she may not be a supporter this time around, they may next time.

Appendix C: Tips for a Group Solicitation Approach

1. **Garner Support of Leadership.** If at all possible, management should approve time off for their employees to attend a kick-off rally for the combined charity drive. Ideally, the CEO should also attend and be prepared to make his/her payroll contribution pledge at that time.
2. **Make it Fun.** Food is always a draw! Incentives are always appreciated - particularly if it is the boss who is offering a half-day off or a prized parking space as part of a participation lottery. (TIP: Tie any lottery into payroll contribution giving (i.e. for each dollar per pay period they have "x" chances to win); this will dramatically increase the overall dollar results of your campaign.) Show the campaign video(s).
3. **Stress the Importance of the Drive.** This is a once-a-year solicitation on behalf of a multitude of charities. Charities can be supported through the convenience of payroll contribution. Donors choose where they want to direct their dollars. If there are coworkers who have been helped by a participating charity, ask them if they will do a testimonial before the group.
4. **Be Positive and Knowledgeable.** If you believe in the campaign, then this will show. Encourage questions and repeat the question if necessary so everyone can hear. If you are unsure of an answer, simply say, "I don't know, but I will find out for you" and then get back to that individual. There are plenty of resources to assist you with the campaign.
5. **Follow Up.** Brochures and pledge cards should be available at group solicitations. You want to tap into the enthusiasm the event has generated immediately. Give employees some time at the conclusion of the group solicitation to make their pledge before they need to return to work. If they do not make their pledge at this time, follow up with each within two days of the event. Remember, the #1 reason people do not give is that they are not asked.

Appendix D: Telephone Solicitation Script

Good morning/afternoon.

I'm _____, and I'm calling to tell you about (name of company)'s charity campaign and to see if you need any further information. May I have a few minutes of your time? Thank you.

Did you receive your brochure and pledge form?

Have you heard about the company's corporate match program? (Explain if needed).

Do you understand the payment choices and options for designating your donation? (Explain as required).

Do you have any questions regarding EarthShare, (the United Way, other participating federations), or the (name of company)'s campaign?

Our (branch) goal is \$_____. Can we count on you to help make the campaign a success?

IF YES - That's great! Please send me your pledge form right away. Thanks again for helping the environment, (the community, those in need), and (name of the company)'s efforts.

IF NO - I'm sorry to hear that you will not be able to help us out this year. May I ask why? I understand your concern. I'd just like for you to consider the types of services and programs supported by the member charities of EarthShare, (the United Way, other participating federations). Perhaps you might consider volunteering at one of their affiliated charities.

Are there any other questions or further information I can provide you with? Thanks for taking the time to consider a donation.

Appendix E: Suggested Timetable Fall Campaign

JANUARY:

- Review and evaluate the recently conducted fall campaign
- Determine awards/recognition recipients from last campaign

FEBRUARY:

- Appoint committees and ask them to begin brainstorming about the upcoming campaign
- Host awards/recognition function for the most recently conducted campaign

MARCH:

- Prepare and release final report on total campaign results from the previous year's campaign to participating employee entities and federations
- Begin monthly distribution of campaign receipts to federations (may be done quarterly if the campaign is less than \$100,000)
- Recruit members for the various campaign committees

APRIL:

- Select potential Campaign Chairman and Campaign Managers
- Committees meet to make campaign recommendations

MAY:

- Develop pledge card. Decide whether to produce own materials and, if so, arrange for design and printing
- Begin recruitment for Champion positions

JUNE:

- Bids for materials received, evaluated, contractor chosen and work ordered
- Request necessary campaign material from the participating charities with a due date at the end of the month

JULY:

- Materials being prepared with delivery at end of month
- Recruit Key Workers within company/departments/divisions
- Set campaign goals

AUGUST:

- Materials distributed to worksites
- Training sessions occur
- Begin publicizing the campaign

SEPTEMBER:

- Campaign kicks off
- Data processing begins
- Issue first campaign newsletter and e-mail announcements of campaign
- Prepare and issue mid-campaign report for campaign newsletter and e-mail
- Hold charity fair or other fun events

OCTOBER:

- Final pledges due
- Begin follow up on pledge cards with discrepancies
- Campaign officially ends (depending on the duration of your campaign. A minimum of two weeks is recommended)

NOVEMBER:

- Reports from each division/department are collected and prepared as final report for submission to central reporting entity
- Campaign audit is initiated
- Preliminary results are forwarded to participating federation

DECEMBER:

- Awards and recognition event announced
- Send thank you letters

Appendix F: How to Handle Common Objections

When a contributor agrees with you, it's easy to breeze through a one-to-one solicitation. However, some contributors won't be totally agreeable. And some may seem to agree all the way through your presentation and then resist giving.

It is natural for contributors to resist giving. Most of us are reluctant to spend or give money unless we are sure that it will be worthwhile. You should expect and (believe it or not) welcome these objections!

When the contributor objects, this helps you identify the problem areas which are causing the resistance. As soon as you know what the areas of resistance are, you can begin using your effective solicitation skills to handle the contributor's objections with ease!

Never attempt to threaten or coerce a contributor who raises objections.

1. Listen for objections.

Listen thoroughly to the contributor's objections. Encourage the contributor to communicate fully by smiling, nodding your head and maintaining good eye contact. It's best to focus on the contributor's ideas and any facts he or she uses to support those ideas. When you listen thoroughly, you gain the information that you need to feel in control of the solicitation call.

2. Restate the objection.

This step reaffirms that you are interested in and understand the objections you have heard. Restating the objection also prepares the contributor for your answer. When the contributor hears the objection repeated, he or she feels encouraged by your personal attention. As a result, the contributor is more receptive to your answer.

3. Acknowledge the objection.

Demonstrate that you are interested in the contributor's concerns by using phrases like "I understand your point" or "That's an important consideration." Use nonverbal language like smiling and nodding your head. This communicates that you respect your contributor. It also makes the contributor feel more comfortable with you.

4. Answer the objection by supplying relevant missing information.

When you answer the objection, you are supplying missing information that educates the contributor and helps clear up his or her concerns. You are also communicating a strong sense of professionalism and expertise.

Appendix G: Effective Responses to the Most Common Objections

Spouse Already Gives

Listen: "My Spouse gives to the workplace campaign where he/she works, so there isn't any need for me to contribute."

Restate: It sounds like you feel that because your husband/wife is already contributing, there isn't any need for you to contribute to the same fund-raising effort.

Acknowledge: I can understand what you are saying.

Answer: You know, I think giving is a personal matter, and the satisfaction that each of us feels when we donate is uniquely personal. Each individual's contribution is based on his/her ability to give. You each may want to give a portion of your weekly income to help others. In that way, you are both doing your share to improve the quality of life in your community, locally, nationally and internationally.

Doesn't Want to Support Specific Agency/Service

Listen: "I don't want to give to EarthShare (or other participating federation) because I don't want any of my money going to _____ agency or _____ service."

Restate: You don't want your gift to go to _____ agency/service.

Acknowledge: I can understand your concern. Perhaps you resent the fact that some of your gift will be targeted to an agency or service that you don't approve of.

Answer: Did you know that with our Donor Choice program, if you have a strong preference for a certain agency or service, you can choose to donate solely to that one? That way your gift will go to a charity or cause you believe in.

In addition, it is important to remember that a wide variety of programs and services are performed by EarthShare's member charities. They help improve our quality of life and that of our children, locally, nationally and internationally.

Administrative Costs Too High

Listen: "The fund-raising and administrative costs are too high at EarthShare (or other participating federation)."

Restate: So you feel that overhead costs are too high.

Acknowledge: That is a valid concern for any contributor.

Answer: I'm not sure why people think it is so high, but I guess there is a tendency to think of all charitable campaigns as being alike and quite frankly, some tend to run high. One of the most remarkable features of EarthShare is how little of contributors' money is spent on administration. Over ninety-three cents out of every dollar raised by EarthShare is spent on environmental programs and services.

Pressured Into Giving

Listen: "I feel like I'm being pressured to give to EarthShare and the other federations."

Restate: Somehow you feel you are being pressured into giving.

Acknowledge: I understand your concern.

Answer: No one should be forced to give. I personally don't want to be pressured into giving, and I'm not going to pressure you. I give because of the critical need for services in the community, our nation, and the world and because I believe that EarthShare is one of the best ways to help people improve their health and quality of life. Pressure defeats the very idea of voluntary giving. Please take a good look at the giving choices and see if there is a charity or cause that you would feel good contributing to.

Duplicates Government Service

Listen: "I don't see any sense in giving to EarthShare when the government takes care of the environment with my tax dollars."

Restate: You can't see the logic of giving to EarthShare when government taxes are utilized for the same purposes.

Acknowledge: I understand your feeling that way.

Answer: Here in the United States, voluntary contributions have played an important role in helping people help themselves. In the area of human services, the government provides many services statewide, but especially in these days of budget deficits many critical services are under-funded or lacking completely. EarthShare funds are used where needed, sometimes where government efforts can't reach and sometimes to further the work of the government or individuals. Keep in mind, EarthShare is not a welfare organization. Indeed, the programs and services of EarthShare charities are designed to benefit communities, the nation and even the world.

Prefers to Give Directly

Listen: "I prefer to give directly, since EarthShare takes 6.6% overhead off the top."

Restate: You want to optimize your gift by giving directly to an agency to get maximum value from your gift.

Acknowledge: I respect that you want your selected agency to get the maximum value from your gift.

Answer: A direct cash gift is always appreciated by any agency. However, a gift through EarthShare makes a support commitment for an extended time period. This pledge is frequently used to qualify for grants or special program funds from other sources and thus increases in value. It also reduces member organizations' reliance on other more costly methods of fundraising.

EarthShare "added values" also include audit and training assistance, ongoing managerial and technical support, and much less costly total campaign expenses. EarthShare was created by its member charities so that they could participate in workplace fundraising. In addition, EarthShare's member charities sit on its board and set its budget.

Can't Afford to Make a Gift

Listen: "I am already on a tight budget. How can I afford to give?"

Restate: You are on a tight budget and are worried about your ability to make a contribution.

Acknowledge: That is a very realistic concern for you and many other contributors.

Answer: Even a modest weekly amount can help improve the environment locally, nationally & globally. There is no gift too small. Every gift makes a difference. And giving through payroll contribution makes your contribution even easier because you can spread it out over 52 weeks. Essentially, it is low impact on your cash flow and high impact on the needs of the community and the world.

Giving Guidelines are Too High

Listen: "The giving guidelines are too high."

Restate: You are worried that you cannot make a gift in the amounts listed on the giving guidelines.

Acknowledge: That's an important consideration.

Answer: The guideline is just that -- a guide. It is not a demand. Many people ask what others in the community are giving, and the guideline is a way of sharing a standard for giving used by many. We are asking that you make your own personal decision as to what you can contribute. We are providing you with a comparison of what just a couple hours of your pay will provide in services. I think you will find a little goes a long way.

Concerns about Allocation

Listen: "I am concerned that the money will not be distributed fairly."

Restate: You are worried about the allocation of the contributions.

Acknowledge: I can understand your concern about allocation.

Answer: EarthShare does not allocate the money given specifically to EarthShare in the same way the United Way does. EarthShare uses a formula. One half of the contributions are divided equally among all participating member charities. The other half is distributed in the same proportion as the corporate workplace designations each charity received which allows corporate employees to help decide where the money should go. Of course, employees may always designate to one or more EarthShare charities. Any money designated to any member charity goes directly to that charity.

Appendix H: Presentation Outline

I. Introduction

Introduce yourself and other members of the campaign

II. Explain the campaign

Why do a campaign?

The company believes in being a good corporate citizen all year long. We also believe in returning something to the communities in which we do business. The annual charity campaign is one part of this philosophy. Individuals and branch teams are also encouraged to volunteer their time and expertise with local and national charities throughout the year.

- Refer to CEO's endorsement letter.
- Explain branch goals of participation and total dollar goal.
- Explain the corporate match program. (if applicable)
- Explain employee payment and choice options.
- Explain incentives, if any.

III. Explain the benefits of giving to EarthShare and the other campaign participants

- One-stop "shopping" -- an easy way to give to hundreds of charitable organizations with one easy payroll contribution.
- Quality assurance: in order to get EarthShare's or other participating federations' money, agencies are subject to a rigorous screening process to ensure that they are effective.
- The ability to choose to give to a specific charity, or make one gift to be spread among a number of charities.

IV. Introduce other speakers, if any

V. Speak briefly about each participating federation, showing videotape after each introduction

EarthShare

- EarthShare is the nation's fund-raising federation for the environment, representing dozens of environmental and conservation organizations.
- Some of the problems EarthShare and its affiliates are trying to solve include:
 - eliminating the health risks due to polluted air and water;
 - reducing our chances of developing cancer from exposure to pesticides found on our fruits and vegetables;
 - saving plant and animal species that are currently on endangered species lists;

- reducing the millions of tons of trash accumulated each year by establishing local recycling centers;
- preserving our beaches and national parks; and
- improving our energy efficiency in buildings, vehicles, and factories.

(Show EarthShare video)

- VI. **Hand out charity materials and pledge forms -- explain forms and options as required**
- VII. **Have CEO or Chairman endorse program and speak for a few minutes**
- VIII. **Ask for and answer questions**

After the formal part of the meeting, you and your branch co-chairs should speak to branch employees on an informal one-on-one basis.

Appendix J: Description of EarthShare

(This has been designed to be communicated to employees through e-mail, in a newsletter or brochure.)

EarthShare is a federation of local, national and international environmental and conservation charities at work in all 50 states and numerous countries overseas to protect human health and the environment through their efforts to eliminate toxic pollution of our air and water; to preserve the world's natural resources; and expand recreational and educational opportunities for children and adults alike.

Contributions to EarthShare charities help solve problems like global warming, acid rain, nuclear waste and oil spills by developing and encouraging safe energy sources, sound policies, and conservation. EarthShare organizations are protecting ancient forests here and overseas, preserving their irreplaceable beauty along with potential sources within them for new medicines. Together, they're guarding groundwater from toxic contaminants; saving endangered species everywhere; providing schoolchildren with educational programs and activities that instill environmental awareness; promoting scores of recycling projects; cleaning up thousands of miles of beaches, lake-fronts and rivers; planting trees; and adding acreage to our national parks and pathways for hiking, biking and walking.

EarthShare's primary source of funding is through employee workplace giving campaigns. Please let us know if you would be interested in being able to support the environment with an EarthShare campaign here at _____. Contact _____ for further information.

Appendix K: What Your Gift to an EarthShare Agency Will Do...

For \$1 per pay period, you can:

- remove 60 pounds of trash from a beach, catalogue it, and identify who put it there
- feed one endangered Aplomado Falcon for ten days
- print and distribute 20 mercury thermometer brochures in English or Spanish telling about the potential health risks from exposure to mercury in broken thermometers and how to clean up and dispose of broken thermometers safely
- pay for a pair of waterproof boots for a brave guard protecting mountain gorillas in the Democratic Republic of Congo.

For \$2 per pay period, you can:

- buy one acre of unprotected tropical rainforest and helps assure that natural areas vital to our global climate and the protection of diverse species are protected
- save 18 feet of trail for bicycling, horseback riding, running or hiking
- furnish one hour of expert training in land protection for a citizen's group or land trust interested in natural areas preservation in their communities
- help alert residents to pollution levels at area beaches so that beachgoers can make safe choices about where to swim

For \$3 per pay period, you can:

- notify key officials and citizens groups of a railroad corridor abandonment, giving local communities an opportunity to create a "Rail-Trail" for walking, bicycling, and nature appreciation that might otherwise be lost
- provide four low-income community-based groups with subscriptions to a publication that educates community activists on threats to public health posed by environmental problems and provides organizing tools they can use to protect their communities

For \$4 per pay period, you can:

- protect three square meters of coral reef, home to hundreds of species of marine plants and animals.
- organize a 3-hour litter walk on a river's edge by 20 concerned citizens
- protect floodplains and riverbanks that help filter harmful pollution out of our drinking water

For \$5 per pay period, you can:

- furnish all classes of a high school with charts and guides about alternatives to commonly used hazardous household products
- plant five trees in an urban area

For \$6 per pay period, you can:

- prevent 75,000,000 pounds of carbon dioxide, the major contributor to global warming, from entering the Earth's atmosphere
- cover the cost of an experienced community organizer to help grassroots groups reduce, eliminate, clean up or prevent chemical contamination that threatens their communities' health

For \$10 per pay period, you can:

- reforest Central American land with 2,100 seedlings which, when planted, reduce soil erosion and improve family nutrition through gardening
- safeguard U.S. drinking water by supporting Citizens' Right to Know programs reporting on contaminants in their drinking water

For \$20 per pay period, you can:

- purchase one spotting scope for monitoring released California Condors, Aplomado Falcons, Hawaiian songbirds, and Harpy Eagles and monitor their movements

- buy an expert toxicologist's time to respond to a community group's need for detailed technical review of air or water quality test results, helping them interpret the data's implications for the risks to their health.

Appendix L: Member Agencies

EarthShare National Member Organization

- African Wildlife Foundation
- American Farmland Trust
- American Forests
- American Rivers
- Beyond Pesticides
- Center for Health, Environment & Justice
- Clean Water Fund
- The Conservation Fund
- Conservation International
- Defenders of Wildlife
- Earth Day Network
- Environmental and Energy Study Institute
- Environmental Defense Fund
- Environmental Law Institute
- Friends of the Earth
- Izaak Walton League of America
- Land Trust Alliance
- National Audubon Society
- National Parks Conservation Association
- National Wildlife Federation
- Natural Resources Defense Council
- The Nature Conservancy
- Ocean Conservancy
- The Peregrine Fund
- Pesticide Action Network
- Rails-to-Trails Conservancy
- Rainforest Alliance
- Rocky Mountain Institute
- Scenic America
- The Sierra Club Foundation
- Student Conservation Association
- Surfrider Foundation
- The Trust for Public Land
- Union of Concerned Scientists
- U.S. PIRG Education Fund
- The Wilderness Society
- Wildlife Conservation Society
- World Wildlife Fund

For a complete listing of EarthShare Affiliate member groups, please contact the national office at (800) 875-3863, or info@earthshare.org