

## 7 Steps of Highly Effective Campaigns

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### ***EWB Quick Facts***

- Overseas, EWB volunteer work in Burkina Faso, Ghana, Malawi, and Zambia contributes to improved water and sanitation, more productive agriculture and market access, and rural infrastructure development.
- EWB sends 10 volunteers overseas for long term placements 3 times each year. These volunteers remain in their placements for a minimum of 14 months.
- EWB also sends 40 student volunteers and 6 professionals on 4 month placements each year.
- EWB is the charity of choice for engineers.
- EWB's membership is 40,000+ strong.
- EWB has 35 chapters across Canada.
- EWB is a Canadian-born charity founded in 2000 by two of Canada's Top 40 Under 40: George Roter and Parker Mitchell.
- **EWB is dedicated to making Canada a model global citizen in how we respond to one of the world's greatest challenges: global poverty.** Through our work in Canada we create, engage and enable this cadre of champions with our **Aware-Care-Prepare-Dare-Share** continuum for informed action.
  - **AWARE:** Supportive of Canada becoming a leader in International Development
  - **CARE:** Interested in learning about development issues
  - **PREPARE:** Eager to learn about development and understand the complexities of the issues
  - **DARE:** Inspired to make a difference and committed to having an impact on development
  - **SHARE:** Ready to share their knowledge and passion about international development issues with others

To learn more go to **[www.ewb.ca](http://www.ewb.ca)**!

## Step 1.

Download the “EWB Campaign Leader Workbook” to make planning easy.

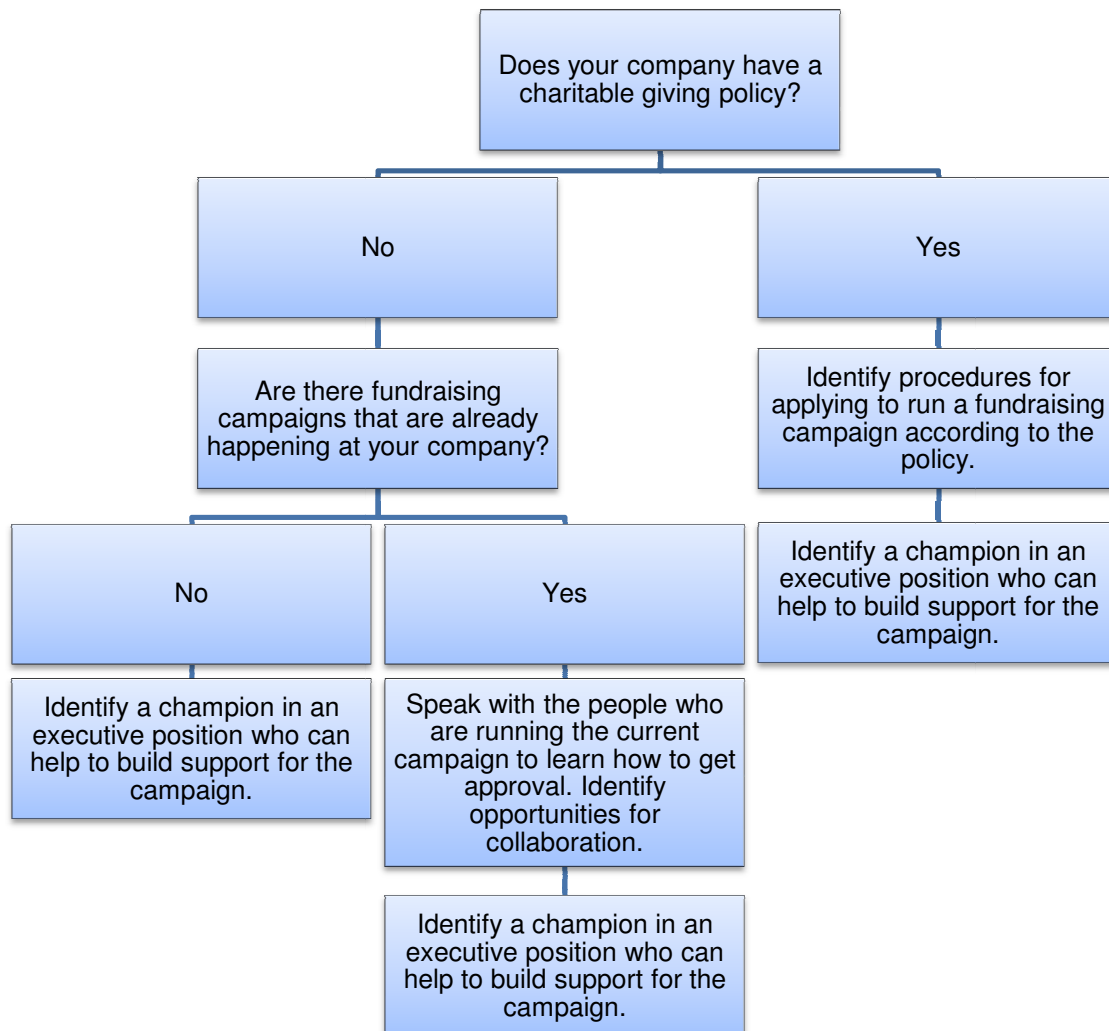
Download the **EWB Campaign Leader Workbook** for an easy way to record and track your campaign planning.

Go to [www.ewb.ca/workplace](http://www.ewb.ca/workplace) to access the workbook, and to see what other online resources are available in our toolkit.

## Step 2.

### Get approval and support from senior management and colleagues to run your campaign.

Being endorsed by someone in an executive or management position is a great way to build your campaign's momentum and credibility. The table below will help you identify the **Executive Champion** in your organization, and introduce you to any existing structures for running similar campaigns.



Once you have identified your Executive Champion, you will likely need to pitch the idea of the campaign. The way you present the idea can have a big impact on how well it is received.

*At Accenture the idea of running a campaign to raise Aeroplan Points was first introduced in 2005. It was rejected because there wasn't a clear enough plan. The next year the team put together a more detailed plan and gave the company more information about EWB. Once management had learned enough about EWB it was easy for them to decide to support a workplace campaign.*

Here are a few tips to make a successful pitch:

- Share your confidence and enthusiasm
- Have a well-developed, but flexible plan
- Be prepared to address concerns and adapt the campaign to the needs of your company
- Start small with a multi-year vision
- Keep your message clear and concise

Be sure to mention the following three reasons why your company will benefit from running a campaign:

1. **Employee retention and morale** – Employees want to work for a company that cares. Your support for EWB will garner pride and morale throughout your company.
2. **Brand alignment** – Your support for EWB signals your company's progressive and innovative side, helping to differentiate you from your competitors.
3. **Employee recruitment** – Hosting a Workplace Campaign is a great way to attract the next generation of globally-aware and globally-driven talent.

It is also important to provide a detailed picture of the resources that will be required from your company, including a budget and employee time. Outlining these requirements in your pitch will demonstrate that you have a realistic understanding of the implementation details and requirements to make the campaign a success.

For help writing an e-mail to your Executive Champion, check the samples and template available online. Visit [www.ewb.ca/workplace](http://www.ewb.ca/workplace) to download.

The success of your campaign depends not only on you, but on the strength of the whole campaign team. Use the following tips to identify those people who will help achieve your campaign goals.

1. Look for other socially aware people within the company that you can draw on for support. The **sample recruitment email and poster** online is one way to attract these people. Don't be afraid to approach people who you think will be a good addition to the team. The more people you have involved, the greater your energy, creativity, legitimacy and capacity to get things done.
2. Draw on the support of your team and encourage each person to contribute his or her unique skills.
3. Leverage the skills within the company to make the campaign stronger. Ask your company to provide pro-bono services, such as marketing or accounting.

For more tools to use in building and managing your team check out [http://www.wiki.ewb.ca/en/Chapter\\_president#Building\\_and\\_Managing\\_a\\_Team](http://www.wiki.ewb.ca/en/Chapter_president#Building_and_Managing_a_Team)

## Step 3.

### Register your workplace fundraising campaign with EWB and establish your fundraising and participation goals.

The three key players in a campaign are the **Campaign Leader (YOU)**, the local EWB **Professional Chapter** and the EWB **National Office**. It is imperative that both the Professional Chapter and the National Office are aware of your campaign so that they can provide support as needed. Each of these players has a set of responsibilities to make your campaign a success:

#### **Campaign Leader**

- Get approval from your company for the campaign
- Put together a campaign team
- Oversee planning, advertising and implementation of activities
- Build an ongoing relationship between EWB and your company
- Get feedback on communications materials from the National Office
- Keep the Professional Chapter and National Office updated on the progress of your campaign and lessons learned so they can share these with others

#### **Your Local EWB Professional Chapter**

- Provide campaign information and resources to the Campaign Leader
- Coordinate volunteer guest speakers and facilitators as requested by the Campaign Leader
- Share lessons learned from other campaigns with the Campaign Leader
- Provide support as needed throughout preparation, implementation and wrap-up phases of campaign

#### **National Office**

- Compile lessons learned from campaigns across the country and share with Professional Chapters
- Provide feedback on all communications materials
- Arrange National Office guest speakers or facilitators as requested by campaign coordinator
- Collect fundraising goals, set-up online donation pages, and issuing charitable tax receipts

Once you have identified the key players and their respective responsibilities, you're ready to set your campaign goals! Most campaigns are driven by two goals:

1. **Fundraising** – The amount of money you want to raise
2. **Participation** – The number of people you want to reach and engage

Setting realistic goals is a daunting task, especially if you have little or no experience running a campaign. Consult with your team and the local Professional Chapter. There are a number of variables (listed below) to consider which will contribute to the success of a campaign.

### ***Timing***

The timing of the campaign can have a major impact on how easy it is to engage employees. To identify the best time to run your campaign, ask the following questions:

- **Does your company run other campaigns?**  
Try to space out the EWB campaign from any other fundraising campaigns that your company runs to avoid overwhelming or confusing employees.
- **When are people most available?**  
Try, if possible, to plan the campaign for a time when there are fewer major deadlines so that people have the time and energy to engage in the campaign.
- **When do people tend to spend more time in the office?**  
Try to plan your campaign for a time when people tend to be in the office. Avoid times when a lot of field work is being done or when many people tend to take vacations.

### ***Length***

Campaigns can run for varying amounts of time – some as short as a week, others as long as a month. Consider the following factors when deciding the length of your campaign, and then record your findings below.

1. **Management Approval**  
Make sure the length of your campaign is consistent with any management guidelines.
2. **Team Capacity**  
Each team has varying degrees of capacity according to skill level, energy, commitment and time availability of volunteers. Make sure you're choosing a length for your campaign that you and your team have the capacity and availability to manage.

**See the sample campaign plans to determine the length of campaign that is best suited for your office.**

### ***Donation Options***

At this point in planning the campaign you will be ready to set-up the financial details. By giving some thought in advance to how people can donate to the campaign, how to keep track of the money, and how to issue charitable receipts, you will save time and effort later. The most effective form of giving through a workplace campaign is an opt-in payroll donation program combined with a company matching program. Take a look below to see what other options might work best for your campaign:

### Employee Giving

Giving Options	Administered By	Giving Type	Tax Deduction?
• An opt-in payroll donation program (eg. \$5, \$20, \$50 per wk).	Your company	Continuous	Yes
• Anonymous collections (donation cans by the coffee machine, money raised at events, or random donations)	You and your team or EWB	One-time	No
• Direct giving in one-time donations from employees to EWB via cash, cheque or online donation site. (Donations accounted for so they can receive tax benefits)	Your company or EWB online	One-time	Yes
• Monthly or daily donors giving program with EWB (longer term).	EWB	Continuous	Yes

### Company Giving

Giving Options	Administered By	Giving Type	Tax Deduction?
• An employee matching program where company matches employee donations to EWB. (\$1-\$1 or \$2-\$1)	Your company	Continuous	Yes
• Lump-sum cheque (at campaign launch or conclusion)	Your company	One-time	Yes

### Employee Matching

Employee matching programs are a great way to reach your campaign goals. Check if your organization has a matching program already. If you think it will work with your campaign, you should propose the idea to your Executive Champion who can raise the idea to a higher level of the organization as necessary.

### Campaign Goal Setting Worksheet

After evaluating all variables and selecting the best options for your office, use the EWB Campaign Goal Setting Planner in the workbook to select an appropriate fundraising level for your Campaign.

You can also direct your campaign fundraising towards a specific overseas project and volunteer profile through our **Workplace Partnership Program**. In return you will have a case and volunteer example to use as a fundraising and education tool through your campaign. Indicate your interest to participate in the Workplace Partnership Program when you send in your registration form.

**Once you've set your campaign goals, register your campaign by filling out the campaign registration form and sending it to [workplace@ewb.ca](mailto:workplace@ewb.ca)**

## Step 4.

Select the ideas, events, or campaign structures that suit your work environment.

### **Activities and Events**

Once you've identified your overall goals for the campaign you can start to think about how to achieve them. Usually campaigns include three types of activities: **fundraising**, **awareness** and **fun**.

*"Show us too many sick kids, unfair imprisonments or burned bodies and you won't get a bigger donation, you'll just get averted eyes."*

Seth Godin  
Author, Tribes

Fundraising activities are, of course, important for achieving the financial goals of your campaign. Awareness activities ensure that people understand where their money is going and learn about how they can contribute to international development more broadly. Fun activities help build excitement around the

campaign. Each event in your campaign should contain at least one of these types of activities.

Based on your goals, you can decide which of these activities are best suited to your campaign. You should also consider your office culture in determining which of these are likely to attract the most participants.

At [www.ewb.ca/workplace](http://www.ewb.ca/workplace) you will find a list of several suggested activities to get you started. But as always, feel free to brainstorm with your team some unique and innovative activities you can run for your workplace.

The **activity planning template** on [www.ewb.ca/workplace](http://www.ewb.ca/workplace) will help you organize the resources that are required to run each of your activities. Contacting people who have run charitable campaigns in the past and updating your Executive Champion are good ways of making sure you are on the right track.

### **Speakers and Workshops**

Among the suggested activities found online, are several presentation and discussion workshops. There are several EWB members who will be more than happy to come to your office to deliver these presentations. Contact the **National Office** if you are interested in inviting a speaker to your office. You can also access presentation notes and slides at [www.ewb.ca/workplace](http://www.ewb.ca/workplace) if you decide to deliver the presentation yourself.

### **Set up a Theme for your Campaign**

If you like more structure in your campaign, we have created four sample themes that you could use to brand your campaign:

- A. Water for the World
- B. Roads to Opportunity
- C. Food for Thought
- D. Life isn't Fair but your Coffee Can Be

You can use some or all of these campaign themes or brand the campaign as you see fit. Additionally by selecting a theme you can direct your workplace fundraising dollars towards a particular volunteer project overseas and use their placement information as an educational tool throughout your campaign. Combine ideas from any of the themes to create one of your own.

### **A. "Water for the World" Theme**

Deadly water-borne parasites threaten the health of developing communities. Today, 1.2 billion people have no access to safe drinking water. EWB volunteers work to improve hygiene education, sanitation facilities and access to safe water in Zambia & Malawi.

You can create your own campaign or use these ideas to focus on water, sanitation, and hygiene issues. Learn about water issues and raise money to help provide **Water for the World**.

**Educational events** that are fun and enriching for employees:

- ⇒ Teams of 4-6 employees can compete against each other in the **Purification Challenge**. Teams create their own water purification filter and learn about development on the way.
- ⇒ A returned **EWB overseas volunteer** with experience on water projects in Zambia or Malawi can walk your employees through an interactive lunch & learn session.
- ⇒ You can lead a 60 minute **Case Study: Collecting Fog on El Tofo** session to increase understanding of the complex nature of trying to deliver water in developing regions.

**Fun events** to get your employee's thinking about water:

- ❖ Your co-workers will have a laugh when they're given the option to donate a set amount for each cup of **dirty water** (coffee) to help provide clean water for those who need it.
- ❖ Get your co-workers' blood pumping by running a **water obstacle course** over lunch, or running a sponsorship raising **Pump-a-Thon**.
- ❖ Some employees just need some R&R. Auction time off of work for a **Friday afternoon at the lake**.

### **B. "Roads to Opportunity" Theme**

Roads, running water and flushable toilets are a guarantee for you here in Canada. In developing countries, more than 80% of the people lack access to basic infrastructure needs. This means they have limited access to healthcare, energy, water, and sewer systems. Improving roads and other infrastructure work allows for other development opportunities for the people of Ghana.

EWB volunteers are working in Ghana to improve infrastructure project planning and implementation. If your company works in infrastructure development, or municipal planning consider building **Roads to Opportunity** in your workplace.

**Educational events** that are fun and enriching for employees:

- ⇒ Teams of 4-6 employees can compete with a **mini-road construction project**. Create your own road to opportunity by auctioning off sections of roads with key facts about infrastructure work in development communities.
- ⇒ A returned **EWB overseas volunteer** with experience on Governance and Rural infrastructure projects can guide you through an interactive lunch & learn presentation.
- ⇒ You can lead a 60 minute **Case Study: Rural Energy or Case Study: Green Revolution** session to increase understanding of difficult choices facing rural households in development countries.

**Fun events** to get your employee's thinking about infrastructure:

- ❖ Co-workers can have a direct impact by taking public transit or biking to work and donating parking or gas money to help improve road infrastructure overseas.
- ❖ Your co-workers will be thankful for their telephone (ICT) access when they are **thrown in jail** at a desk and can only call friends and colleagues to collect donations and post bail.
- ❖ Get your employee's thinking about opportunity for Africans by raffling **African made products, or cultural events** from groups like 10,000 villages.

### C. "Food for Thought" Theme

800 million people go to bed hungry every day. Hunger is not always a result of insufficient food production; in some rural communities up to 30% of crops spoil due to lack of processing or preserving technologies. Many farmers are only able to farm for sustenance and not for business.

EWB volunteers are working in Ghana to support the Ministry of Food & Agriculture by strengthening their services to support farmers in building a business and improving access to processing, harvesting and farming technologies.

You can create your own theme or use these ideas to focus on hunger and how better food security and food processing can be used to effectively combat hunger. Give your employee's some **Food for Thought** and help provide food for those who need it.

**Educational events** that are fun and enriching for employees:

- ⇒ Teams of 4-6 employees can compete with the **rice processing challenge**. Create your own rice processing mill, and change rice from the hull that's picked to the grain you eat.
- ⇒ A returned **EWB overseas volunteer** with experience on Agriculture projects in Africa can guide your employees through an interactive lunch-and-learn session.
- ⇒ You can lead a 60 minute **Case Study: Small Scale Farming in Africa or Case Study: MFP for village power** session to gain an understanding of the complex nature of food security and food processing in developing regions.

**Fun events** to get your employee's thinking about food:

- ❖ Co-workers can have a direct impact by bringing a **brown-bag lunch** and donating their lunch money to help drive agricultural projects overseas.
- ❖ Host a **potluck** where co-workers make their specialty dish or donate a set amount to join in on the event.
- ❖ Get your employee's hungry for more by raffling **dinner for two**, or **dinner with the CEO** at a fine restaurant.

#### **D. "Life isn't Fair but our coffee can be" Theme**

Fair Trade products provide direct support for farmers in developing communities by providing them with a fair wage, as well as community programs to improve livelihoods. EWB volunteers are working to improve the Fair Trade market share of commodities like coffee, tea, sugar, chocolate and bananas in Canada. You can bring Fair Trade to your workplace in your coffee stations or cafeteria and rally your colleagues around the idea that **life isn't fair but our coffee can be**.

**Educational events** that are fun and enriching for employees:

- ⇒ Teams of 4-6 employees can compete in the **trade market challenge**. Create your own market simulation event with various fair trade and non-fair trade products to build an understanding of the Fair Trade certification process.
- ⇒ An **EWB volunteer** from a local Professional chapter can come and give an interactive presentation on Fair Trade to raise awareness of the ins and outs of Fair Trade products.
- ⇒ You can lead a 60 minute **Case Study: Intro to Creating Social Change** session to improve understanding of why EWB is promoting Fair Trade.
- ⇒ Show the movie **Black Gold** in your office auditorium, or boardroom to showcase the impact of trade regulations on developing world farmers.

**Fun events to get your employee's thinking about fair trade:**

- ❖ Serve **Fair Trade Coffee & Tea** in all office coffee stations throughout the campaign week. You can even do a taste test to see if you can tell the difference between regular and fair trade coffee products.
- ❖ Host a **Fair Trade BBQ** where co-workers can donate a set amount to participate in a Fair Trade only meal!
- ❖ If your event is near Halloween (or even if it isn't), host a Reverse trick-or-treating day in the office and give our fair trade chocolate and info to all office employees.
- ❖ Make a **Fair Trade Wage Day** in which employees are challenged to trade a days' wage to participate in dress down Friday, or an afternoon off work.
- ❖ Get your employee's thinking Fair by raffling **Fair Trade products**.

## Step 5.

### Schedule and communicate your campaign and events.

Advertising is key to ensuring success in your campaign. Below are a few tips to help you make your advertising effective. Be sure to check with your administration for limitations or guidelines that may be in place for office communications.

#### **Branding**

It can be really helpful to use branding techniques to help people remember your campaign. Some simple ways of promoting a brand around the campaign include:

- Using the **EWB logo** on all materials (the logo can be downloaded from the 'Resource' section at [www.chapters.ewb.ca](http://www.chapters.ewb.ca))
- Using the **same colours** for all materials
- Using **consistent formatting**
- Having a **common theme** to the advertising materials

#### **Messaging**

Ensure that the message you are conveying in your communications is consistent with your campaign, and with EWB's communications. Consider the following guidelines when drafting your messages:

- EWB's messaging tends to centre on the creation of opportunities for people to work their way out of poverty.
- When talking about our approach, we highlight the problem-solving approach, critical thinking skills, and creative-pragmatism of engineers.
- We believe that people contribute because they want to make a difference and not because of guilt. Guilt-giving is short-term; why not empower people to make a difference rather than asking them to give because they feel bad?

#### **Emails**

Sending out **regular emails** can be a good way to keep people informed about the progress of the campaign as well as opportunities to get involved. Check online at [www.ewb.ca/workplace](http://www.ewb.ca/workplace) for sample communications.

*Guidelines on how and when to send e-mails:*

- **Get your message to reach as many people as possible.** Many large organizations have regular internal newsletters. Be sure to contact the people responsible for publishing the newsletter well ahead of your campaign. If no newsletter exists, check whether or not any policies are in place for sending company-wide e-mails.
- **Keep your message concise.** Your colleagues are already barraged with e-mails from every direction. Make sure your message is direct and effective. Decide on the key pieces of information you want to convey to give your message direction.

- **Minimize the number of e-mails you send.** Less is more. Make sure every e-mail says something new and exciting. It may not be necessary to send e-mails everyday of the campaign. Use your own judgment and understanding of your office culture to decide how many e-mails you want to send.

### **Websites**

Similar to e-mails, you can work with the website administrator at your office to see what possibilities exist for advertising on the company's internal website. Ideas include:

- A tracker for your campaign's fundraising goals, and the funds raised to date
- A list of the events taking place during your campaign
- A link to the Engineers Without Borders website

Samples of a tracker and events list are available online at [www.ewb.ca/workplace](http://www.ewb.ca/workplace).

### **Printed Materials: Posters and Handbills**

Put **posters** in the lunch room, reception area, by the elevators or in any high-traffic areas where people may pause. Try to keep content simple and captivating; most people will spend no more than 30 seconds looking at your posters. Decide in advance how many posters you need and try to keep them to a minimum. A **sample event poster** can be found at [www.ewb.ca/workplace](http://www.ewb.ca/workplace).

**Handbills** are also great because people can take the information away with them. You can use these to provide more thorough information about the campaign and EWB.

In both cases, be sure to check with your administration for company policies on where to post materials, and whether or not there are any limitations or guidelines on content.

### **Word of Mouth**

**Personal invitations** will make people feel more connected to the cause and more likely to become involved. Invite your co-workers to participate and encourage your team members to do the same.

### **Finances**

As the Campaign Leader, you are responsible for collecting donations and sending the required information for receipts. There are two methods for collecting funds: **online** or **in-person**.

The online method is much simpler, since it allows donors to enter their information and submit to EWB directly. Check out the link below for an example of a website that can be set up to enable online donations.

<https://www.ewb.ca/en/whatyoucando/campaign/index.html?campaign=wardrop>

To set-up a similar website for your campaign send a request to [workplace@ewb.ca](mailto:workplace@ewb.ca).

The in-person method may be more suitable for events run during the campaign, but will require that you maintain accurate accounting for each person's donations. Cheques should be sent with a clear spreadsheet tracking name, address and donation amount to [workplace@ewb.ca](mailto:workplace@ewb.ca) for processing. Check out the finance section at <http://www.wiki.ewb.ca/en/Finance> to clarify the required procedures or for more information.

## Step 6.

### Run the event... and have fun!

#### ***Overseeing Activities***

Delegate at least one person to oversee and 'own' each activity. Make sure he or she is aware of everything that needs to happen.

#### ***Maintain Accurate Finances***

Use the workbook to record the required information for all the donations you collect during your campaign.

**Receipts for donations can only be issued by the National Office.** In Workplace Campaigns, donation receipts may be recorded as part of the employee's T4. Please note that tax receipts are only issued for cumulative **donations** of \$20 and above. (Note that we cannot issue tax receipts for any transaction for which an individual purchases something – raffle tickets, pancake breakfast, etc.)

#### ***Maintain your Energy and Enthusiasm***

As the Campaign Leader you are incredibly important in setting the tone for people's attitudes towards the campaign. Keeping your energy and enthusiasm high will help get others more excited about being involved.

#### ***Reflecting and Adjusting***

It will be important for your team to reflect on the campaign and to adapt according to lessons being learned along the way. Think about when it will be most useful to have reflection time and schedule meetings with your team during those times.

## Step 7.

### Thank your donors, supporters and celebrate your success!

#### ***Closing the Team***

Make sure you take the time to celebrate successes with your team. This could involve anything from a **thank you e-mail** to a **celebration party**. It's also important to thank each person individually for their contribution. This can be as formal or informal as you like but it will help make people feel appreciated for their work and increase their incentive to be involved in the future.

#### ***Thanking Campaign Supporters***

Make sure to celebrate the success of the campaign with everyone who attended events or donated. An e-mail can be sent, thank you cards given to donors, a press release issued, or a celebration barbeque held for everyone who contributed. The people who contribute to the campaign are what make it successful so make sure they are aware of how much they are appreciated. Additionally, a memorable celebration will get them excited to contribute in the future. A **sample press release** can be found online.

It's also important to thank the company and managers for their support. Make sure you acknowledge the role that they played in the campaign and communicate the campaign successes to them.

#### ***Reporting***

Campaign reports serve two purposes. First of all, they are important for whoever will be running the campaign the following year. They help the new Campaign Leader build-off of past successes and lessons learned. They are also important for the Professional Chapter and the National Office to be aware of what is happening in various workplaces. This way they can capture lessons that can be applied to running workplace campaigns at other companies. A **campaign report template** can both be found online. This report should be completed and emailed to [workplace@ewb.ca](mailto:workplace@ewb.ca) at the close of your workplace campaign.

#### ***Long-Term Planning***

Depending on the success of your campaign and your own impressions (based on discussions with your team and your Executive Champion), you may consider putting together a proposal to turn your campaign into a regular event in the office. Use your Executive Champion to find out if any explicit steps need to be followed to make this happen. The **long-term planning template** online can be used to build a three year plan if no such documentation exists, either for your own records, or to be submitted to higher management.

#### ***Transition to New Campaign Leader***

It can be very valuable to identify who will coordinate next year's campaign before even starting this year's campaign. That way they can observe some of the successes and challenges as they arise and be better prepared to address them the following year. You may even decide that you'd like to coordinate the campaign again next year. This is a great way to make sure lessons that have been learned do not get lost.