

# Give. Volunteer. Act.

## Employee Campaign Coordinator Manual

### Tips, Tools, Techniques



**United Way  
Centraide**

Greater Moncton and  
Southeastern New Brunswick  
de la région du grand Moncton  
et du sud-est du Nouveau Brunswick

# United Way of Greater Moncton and Southeastern New Brunswick

## History of the United Way

The United Way of Greater Moncton and Southeastern New Brunswick Region Inc. is a local, non-profit charitable organization founded in 1953 and has been committed to building safer, healthier and stronger communities for over 60 years.

In 1953 the United Way in our region was known as the Moncton Community Chest Inc. and ran an annual campaign called the "Red Feather Appeal." \$103 372 was raised during their first campaign, and this money went to support 12 partner agencies. Today United Way GMSENB supports over 30 agencies as well as community initiatives and has a campaign of over \$2.25 million.

## Why give to the United Way?

- **It's efficient** It's a great way to streamline all of your donations through one process. In 2016, the United Way distributed funds to 28 programs through 26 agencies in the Greater Moncton and Southeastern N.B. region.
- **It's effective:** The United Way is committed to investing in programs and organizations that deliver outcomes and address pressing community priorities.
- **It's painless:** The corporation deducts the pledge from payroll and issues a cheque to the United Way.
- **It's simple:** No need to keep track of multiple receipts, charitable giving is recorded on the employee's T4.

**All money raised by United Way stays in the community where we LIVE and WORK; ensuring local services are available for those in need.**

**The United Way invests in programs that have provincial impact, as well as organizations that meet unique needs in both rural and urban communities.**

### All that kids can be

- Improving access to early childhood learning and development programs
- Helping kids do well at school and complete high school
- Making the healthy transition into adulthood and post-secondary education

### Strong communities

- Improving access to social and health-related support services
- Supporting resident and community engagement
- Supporting community integration and settlement

### From poverty to possibility

- Moving people out of poverty
- Meeting basic human needs (Ex. food, shelter, and jobs)

# Six Steps to Running a Successful Workplace Campaign

## 6 steps to success:

1. DEVELOP your strategies
2. PROMOTE your campaign
3. PLAN your approach
4. MONITOR your progress and REPORT your results
5. RECOGNIZE and THANK volunteers and Donors
6. EVALUATE your Campaign

*Note: All employee gifts (by cash, cheque, and credit card) must be in to the United Way office by December 31 to be receipted in the current year. If not, receipts will be for the new year.*

Running a successful Employee Campaign requires planning and the coordinated efforts of a committed Campaign Team. We've created the following checklist to help you and your team during each phase of planning and implementation.

## Step 1: Develop your Strategies

**How will you reach your goal?**

**How will you increase employee participation?**

**How will you increase the average employee gift?**

Some examples include:

- Offer more opportunities for employees to learn about United Way
  - Arrange for a United Way speaker to address your staff group.
- Offer draws (incentives) which encourage staff to give to the United Way.
- If you submit your pledge on the first day you are eligible to win.
- If you pledge \$5/pay, you receive 1 ticket in the draw to win.
- If you pledge \$10/pay, you receive 3 tickets in the draw to win.
- If you pledge at Builder level of \$19.24/pay or \$500 annually, you receive 10 tickets in the draw to win\_\_\_\_\_.
- Promote what it means to be a Leadership Giver. (\$1,000+ annually or \$38.47/pay based on 26 pays/yr)

## Step 2: Promote your Campaign

Publicity and promotion injects campaign spirit and kicks off the fun in your campaign. Promoting your campaign will generate awareness and an understanding of the need for a gift to United Way. Your promotions should complement and assist the canvassers with special fund raising events. **However, special events should be conducted after the canvass because they can reduce employee pledges.** United Way can provide you with a variety of promotional items such as posters and print materials, that can help deliver your message to employees. You may wish to use the United Way Campaign theme, or develop a theme that appeals to your committee and employees.

# Six Steps to Running a Successful Workplace Campaign-Continued

## Step 2: promote your Campaign-Continued

Employee Campaign Committees (ECC) have successfully promoted their campaigns by:

- Introducing incentive/reward programs with draw prizes for those who make their donation early.
- Using the company or staff newsletter to present campaign highlights or tell a story about someone who has turned their life around because of help from United Way.
- Using electronic mail to provide the latest on campaign progress.
- Posting United Way posters and information in highly visible areas.
- Showing United Way videos in the lunchroom.
- Coordinating department challenges for the best increase, most pledge forms completed, etc.

## Step 3: Plan your Approach

During your analysis, you may have discovered that the canvass is one area of the campaign that needs attention. Employees need information about United Way before they can make an informed giving decision.

- **Group Canvass:** This is a sure way of delivering the same message to all staff. A group presentation, which includes a United Way speaker, a video, and an endorsement message from your CEO, is effective and takes as little as 30 minutes. Pledge cards should be personalized and ready for canvassers to distribute at the meeting. Canvassers should also collect the pledge cards to ensure donor confidentiality.
- **One-on-One Canvass:** A One-on-One Canvass can be very effective, especially when employees are asked to contribute by a peer. In other words, executives canvassing executives, union employees canvassing union employees, and so on. Canvassers making a One-on-One approach must be committed to United Way and be able to answer donor questions.
- **Combination Approach:** This includes a Group Canvass followed up by a One-on-One approach by canvassers.

### Leading the campaign solo:

First off, thank you! Know that you are not alone, we are here to help! Utilize your staff partner as much as you can to help you find what you need.

### Tip for 500+ employee companies

Diversify your team to expand your reach. Get Reps from all departments, sites and all levels of the organization.

### We can come to you!

Can't make it to training? Talk to your United Way staff partner about customizing training at your workplace for your whole team.

### United Way Staff Partner

Your United Way staff partner is the Resource Development Manager or a Loaned Representative (a staff person loaned from a local company that works for the United Way during campaign.)

# Six Steps to Running a Successful Workplace Campaign-Continued

## Sample Ask:

"I just wanted to come by and drop off this United Way pledge form. This year we are striving for 100% employee participation. I have also attached a brochure that shows the different ways your gift will make a difference in your community. If you have any questions about United Way, please let me or any of the Campaign Representatives know. Otherwise, thank you for your thoughtful consideration to pledge this year."

Sub in any of the following:

- Prize draw due date
- Personal story about why you believe in United Way
- Promotion of corporate/sector challenge goals or results

## Engage your Union :

- Ask for an influential union representative to sit on the committee
- Invite your union representative to speak at kick-off.
- Ask to attend and present at a pre-existing union members meeting
- Thank union leaders for their support

## Step 4: Monitor your Progress and Report your Results

Update your campaign progress and report campaign results to all employees regularly. This ensures employees will have the latest information, generating more campaign excitement and enthusiasm.

- Ensure that every pledge card is returned, even when the employee has chosen not to give.
- Follow up with individual canvassers when performance appears low.
- Report your results to your United Way contact and to your CEO.
- Conduct a "mid-campaign" analysis and maximize your results.

## Step 5: Recognize and Thank Volunteers and Donors

Celebrate your successes!

Acknowledge the people who have contributed to your campaign; donors, canvassers, committee members, and other volunteers. Many of them have worked hard and deserve thanks! Send them a letter and post thank you notices to donors and volunteers on your staff bulletin board. CEO acknowledgment to volunteers provides special recognition. Some campaign committees organize a recognition event where awards and prizes are distributed. It is a nice way to finish off your successful campaign. United Way provides certificates to recognize all of these contributors.

Have a cheque presentation with United Way and promote your successes with media and your community.

Say Thank you! Both donors and volunteers deserve a thank you for making your campaign a success. Deliver a thank you note, host a thank you Tea, etc.

# Six Steps to Running a Successful Workplace Campaign-Continued

## Step 6: Evaluate your Campaign

It is important for the campaign team to analyze and evaluate all aspects of the campaign. The analysis is an important planning tool for future campaigns. Your United Way contact can help you in the evaluation and analysis.

Review campaign results and compare them to your objectives. Recommendations will be valuable in planning next year's campaign.

A written report identifying activities and results will be appreciated by next year's ECC. File the report in your company's United Way campaign file and send a copy to United Way and your CEO. Invite a United Way staff partner in for a meeting to discuss the campaign to determine best practices for the following year.

Give. Volunteer. Act.



# United Way Workplace Representative Guide

## Step 1: Prepare

### **Build your understanding of United Way and the needs in our community**

Learn about United Way of Greater Moncton and Southeastern New Brunswick before you begin asking your co-workers for contributions. You need to be able to answer basic questions with confidence and have the appropriate information ready.

- Review and become familiar with the helpful materials posted on our website

<http://www.gmsenbunitedway.ca>

### **Research your past workplace campaign**

Know the dollar amount raised last year including all the special events that were held, past goals, and the timeline of your workplace campaign. Speak with your ECC or your United Way staff partner if you have any questions.

### **Make your own gift first**

As a canvasser you will find it much easier to ask others to give when you know that you have already given yourself. Your contribution sets a good example and shows your commitment to the campaign and to the community.

### **Build your confidence**

Start with people who already support United Way. Approach co-workers that you have a good relationship with in order to build your confidence.

### **Set your expectations high**

Be prepared to ask donors to increase their contribution. Let them know that even an extra 25 cents/ pay can make a big difference.

## Step 2: Meet

### **Set the tone**

Be relaxed and positive. Thank your colleague for meeting with you.

Example "Hi John. Thanks for taking the time to meet with me today. Our United Way campaign has officially begun and I am here today to ask for your support. Do you recall receiving your United Way pledge form?"

# United Way Workplace Representative Guide

## Step 2: Meet-continued

### **Make your case**

Share your thoughts on why you support and donate to United Way. Include community facts and/or messages about United Way that have personal meaning to you. This is your opportunity to dispel myths and make sure your colleagues have the correct information to make informed choices. Some examples include the programs and services that receive funding, the low administrative costs, the abundant use of volunteers to run the campaign or the accountability and strict code of ethics followed by United Way and all of its funded agencies.

### **Answer questions**

Listen carefully to any concerns and answer questions as honestly as possible. If you do not know the answer to a question, refer to the FAQ section of this book or make a note of it and contact your United Way staff partner.

### **Ask for the donation**

Give each colleague a pledge form and ask for their support. Be clear that no matter the amount, every donation to United Way makes a difference in our community. Promote payroll deduction if it is offered in your workplace as a convenient way to make this investment. If someone is undecided, leave a pledge form and a brochure, direct them to our website and check back later. Often this will help them decide.

### **Always say "Thank You"**

Make sure to thank each person you call upon, including those who listened but decided not to give. Remember, not everyone will be able to contribute this year, but they might contribute next year.

## Step 3: Follow-up

### **Ensure that everyone has been given the opportunity to participate**

Keep track of anyone who was away on holidays or sick leave and make sure that they have been canvassed before you close out your campaign.

### **Follow up as previously arranged**

Go back and see the people you left pledge forms with. Bring back any information you promised to gather for them.

### **Turn in all pledge forms**

Submit all pledge forms to your ECC, even if no contribution was made.



# Leadership giving

## Are you a leader?

There are over 190 committed Leaders of the Greater Moncton area who contribute over \$ 1,000 annually, defining them as Leaders with United Way's Leadership Giving Program. This program gives progressive, community-minded Leaders the opportunity to be a part of the solution to our city's complex social issues by enabling us to develop long-term, sustainable strategies.

### BECOME A LEADER WITH UNITED WAY TODAY:

- Gifts through payroll deductions.
- Gifts through pre-authorized payment by credit card or chequing account.
- Through online donations at [www.gmsenbunitedway.ca](http://www.gmsenbunitedway.ca)



### Benefits of being a Leader:

- Valuable Tax Receipt
- Enhanced sense of community – Leadership giving provides donors with the personal satisfaction of making a significant contribution to the quality of life for everyone in the community.
- Gain positive image as an employee – Leadership donors are often seen as positive role models with their peers and other employees.
- Public recognition as a Leader – Leadership donors are listed in United Way's Annual Report to the Community and on our website.

## **We are here to help!**

Contact us anytime you for information or assistance!

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