



**United Way  
Centraide**

Central New Brunswick  
Région du centre du N.-B.

## **2020 Workplace Charitable Campaign**

### **Team Captain Guide**

Running a successful Employee Campaign requires diligent planning and the coordinated efforts of a strong, committed Campaign Team. The following checklist will help you and your team during each phase of planning and implementation.

#### **Plan Your Campaign**

- Review last year's campaign (consult with last year's captain if this is your first year), strategize for this year's campaign
- Identify strengths/weaknesses and opportunities for growth from previous campaigns
- Work with your Campaign team to develop a detailed timeline and calendar of events - see virtual ideas handout
- Identify the most effective canvassing techniques, and develop a plan to ensure everyone is approached

#### **Recruit Your Campaign Team**

- Your team should include members from all departments, branches and locations of your organization.
- Select a member of your team to be the canvasser coordinator to ensure that sufficient canvassers have been recruited and trained, and every employee is "asked" to participate.
- Have canvassers from all levels in order to conduct peer-to-peer solicitation - which is the most effective method
- Ensure you have your team recruited in time to allow for canvassers training
- Recruit a Leadership chair to canvass leadership donors (\$1200+) and senior management

#### **Train your Team**

- **Contact Anne Foster at 459.7773 x 201 or [anne@unitedwaycentral.com](mailto:anne@unitedwaycentral.com) to access a virtual or in-person canvasser training session.**



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### Kick-off – Workplace Canvass & Support

- Ensure senior management is present at virtual kick-off, engaged in the campaign and providing visible support - including providing adequate time for volunteers to work on the campaign
- Contact Anne (459.7773x201 or [anne@unitedwaycentral.com](mailto:anne@unitedwaycentral.com)) to arrange a virtual presentation for your kick-off
- Inspire your colleagues to donate by hosting a large-group virtual kick-off. If this is not possible, use existing meetings to conduct mini kick-offs in each branch and department
- Have your kick-off **BEFORE** any planned events for maximum return – canvass first, events later

### Make the Ask

- **Make sure that all employees are included** in your campaign (new hires, part time, leave, vacation, parental/maternity leave)
- Arrange to have the canvassers send the online pledge forms immediately after the kick-off and have a pre-determined date for the forms to be completed. If using paper copies, also set a date for return of paper copies.
- Ensure that payroll deduction is being promoted as the easiest, most convenient way to give
- Do a one-on-one, peer-to-peer ask via email or during virtual meetings. Don't forget to follow up with those who have not returned their forms
- Incentive draws for all staff encourages quick return of the forms
- If utilizing paper pledge forms, submit the pledge forms as they are received to the United Way office.
- Return all paper pledge forms to the United Way office

### Mid-Campaign Review

- Conduct a mid-campaign review, this is an opportunity to assess how the campaign is going, conduct problem solving, motivate your team, and thank them for their efforts to date



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## **Don't Forget the Thank You!**

- Thank all the staff for the opportunity to invite them to give
- Don't forget those who did not give, they may want to in the future.
- Hold a virtual thank-you event for canvassers or make it part of an existing virtual meeting or townhall – present them with virtual certificates or acknowledge them via your company's intranet.
- Invite United Way to report back to staff on the impact of their donations

## **Special Events**

**\*Due to current Covid restrictions, we understand events can happen but with social distancing in mind. Please see the Virtual Ideas Handout in the online toolkit which outlines some activities departments can do in small groups or individuals can do on their own.**

Events can be an important part of your campaign. But...**It's All About Timing!** Consider having one or two events to create enthusiasm and build momentum and awareness. These may include a kick-off, early bird draw, and a final draw. **They should not take away from the employee pledges and are best scheduled after the pledge forms have been distributed.**

## **Increasing Participation**

Increasing participation begins at the planning phase of your campaign. Use the checklist below to see whether you are on track to increase participation this year!

- Campaign team members are from of all departments, branches, and locations of the organization
- A Canvasser Coordinator has been recruited from the team to ensure that sufficient canvassers have been recruited, trained and every employee is "asked" to participate
- Management supports the campaign and provides visible support along with providing adequate time for volunteers to work on campaign



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- A Leadership Chair has been appointed to canvass leadership donors and senior management
- An analysis has been scheduled to review previous results and identify areas of opportunity, strengths, and challenges
- Previous results have been analyzed to determine which areas need to be focused on to attract new donors
- A participation goal has been set and the number of donors required to achieve this goal has been identified
- Have United Way provide a customized training session for your campaign team and canvassers.
- The most effective canvassing techniques have been identified and a plan has been developed to approach all employees, including part-time workers, field workers, new hires, those on leave, vacation, and parental/maternity leave
- An awareness plan is in place including sending out or posting UW videos on internal intranet, providing "Impact of Giving" info sheets, Campaign and #Unignorable posters are visible in community spaces such as meeting rooms, break rooms, common areas, etc.
- Online and paper Pledge forms have been delivered
- Payroll deduction is being promoted as the easiest, most convenient way to give
- Events are timed to protect the canvassing period
- A prize/draw/incentive is being offered to encourage strategies to increase participation
- There is a plan in place to thank all donors, volunteers and employees to ensure high participation in the following year

**REMEMBER** - The #1 reason that people do not donate is because they were never asked



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