**2021 GNB 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**

* Attend the Team Captains Training Session
* 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
* 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 to arrange a canvasser training session.

**Kick-off – Workplace Canvass & Support**

* Ensure senior management is present at kick-off, engaged in the campaign and providing visible support - including providing adequate time for volunteers to work on the campaign
* Contact Anne Foster to arrange a presentation for your kick-off
* Inspire your colleagues to donate by hosting a large-group 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 deliver the pledge forms immediately after the kick-off and have a pre-determined date for the forms to be returned
* Ensure that payroll deduction is being promoted as the easiest, most convenient way to give
* Do a one-on-one, peer-to-peer ask. 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
* Submit the pledge forms as they are received to the United Way office.
* Return all 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

**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 thank-you event for canvassers – present them with certificates
* Invite United Way to report back to staff on the impact of their donations

**Special Events**

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
* 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
* The United Way have provided 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 group information sessions, agency tours and/or agency speakers
* 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