

# EMPLOYEE CAMPAIGN TRAINING GUIDE





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## What to Say About United Way

### United Way Backgrounder

United Way, with the support of our partners and donors are working to create opportunities for a better life for everyone in our community. We believe that our community is strongest when everyone is able to reach their full potential.

The issues affecting people's lives are often complex and ever changing. These issues need to be addressed at the roots and United Way is evolving and adapting in order to create a more sustainable future for those most affected. We focus our knowledge and resources in three areas:

- **KIDS:** Ensuring children and youth grow up healthy and transition successfully into adulthood.
- **POVERTY:** Building individuals' financial stability and independence by providing access to healthy food, affordable housing, and employment.
- **COMMUNITY:** Developing the skills of people to care for themselves and their families by creating opportunities and places for social interaction.

**In the short-term** United Way is focused on immediate needs by investing in local services.

**To achieve our long-term goals,** we participate in research and community conversations. We facilitate important partnerships and discussions, and we provide training opportunities and improve capacity in many community-based organizations.

**“Together, we are possibility”**

Helping kids be  
all that they can  
be

Building strong  
communities

Moving people  
from poverty to  
possibility



## Campaign Planning Checklist

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

### Meet with your United Way staff partner or Loaned Representative

**Target Completion Date:** \_\_\_\_\_

- Review last year's campaign and strategize for this year's campaign.

### Plan your campaign

**Target Completion Date:** \_\_\_\_\_

- Identify strengths and opportunities for growth from your previous campaigns.
- Set participation and financial goals for your campaign.
- Work with your Campaign Team to develop a detailed timeline and calendar of events using the campaign plan section of this guide.

### Recruit your Campaign Team

**Target Completion Date:** \_\_\_\_\_

Your team should include members from all departments, levels and locations of your organization. Remember to include team members who represent second and third shift employees, as well as union members.

- Campaign Representatives for peer-to-peer solicitations, which is the most effective method of fundraising. Strive to recruit one representative for every 10-15 employees.
- A United Way staff partner or Loaned Representative on your team who can offer ideas, train team members, request speakers, make presentations, and much more.
- Ensure you have your team recruited in time to get orientation dates into their calendars.

### Train your team

**Target Completion Date:** \_\_\_\_\_

- Energize your Campaign Team by sharing United Way's work in the community.
- Hold a Campaign Representative training session at your workplace; your United Way staff partner or Loaned Representative can facilitate this.

### Initiate Leadership Giving Campaign (\$1200 +)

**Target Completion Date:** \_\_\_\_\_

- Coordinate a Leadership Giving Campaign Plan.
- Review your organization's list of past Leadership donors and confirm the donors are still employed at your organization.

### Kick-Off: Engage Donors and Employees

**Target Completion Date:** \_\_\_\_\_

- Inspire your colleagues to give with large group kick-off meetings, lunch & learn presentations, etc.
- Host a United Way presentation for your employee group to create awareness among all staff and demonstrate the impact their gift to United Way has in our community.
- Spread United Way's message via email, voice mail, management/union endorsement letters, newsletters, desk drops and notices included with pay cheques.
- Utilize United Way brochures, posters and videos. Your United Way staff partner or Loaned Representative can offer advice on how to keep employees actively engaged in your campaign.



## Campaign Planning Checklist

### Make the Ask

Target Completion Date: \_\_\_\_\_

- Strive to ASK 100% of your organization's employees and retirees to donate to United Way.
- Do a one-on-one, peer-to-peer ask with personal follow-up.
- Ask selected employees (based on salary grade or title) to give at the Leadership level with gifts of \$1,200 +

### Report Results

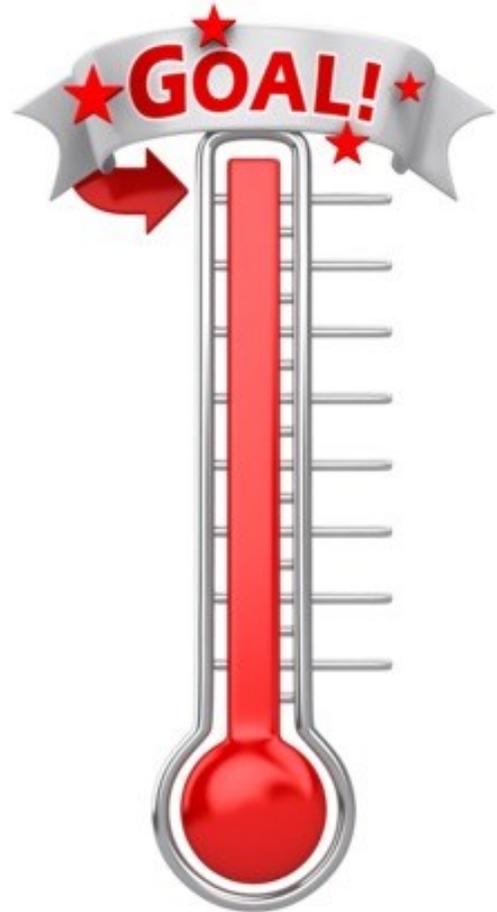
Target Completion Date: \_\_\_\_\_

- Schedule a mid-campaign update meeting with your committee and your United Way staff partner or Loaned Representative. At the mid-point of your campaign, dollars should be at 70% of your campaign goal. This meeting is an opportunity for problem-solving, motivating your team, and thanking them for your efforts to date. It creates action steps to ensure you reach your goal.
- Submit money and reports at mid-campaign and again within two weeks of the end of your campaign. **Early submission ensures your colleagues' gifts are processed and Leadership donors are thanked in a timely manner.**
- Deliver all forms for payroll deduction gifts to your payroll department. Keep your employees informed on campaign progress using email or posted thermometer.
- Follow up. Ensure all previous Leadership and pre-Leadership donors have been given the opportunity to give by doing personal check-in reminders. It is much easier to renew a gift than it is to acquire a new gift.

### Say Thank You!

Target Completion Date: \_\_\_\_\_

- Thank all donors and volunteers who have made your campaign a success.
- Hold a thank you event for employees.
- Invite United Way to report back to staff on the impact of their donations. A presentation or Seeing Is Believing tour in the months following your campaign reinforces the value of donors' gifts and makes your job easier next year.





## How To Ask

### Step 1: Prepare

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

Learn about United Way of Saskatoon and Area 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 at: [www.unitedwaysaskatoon.ca](http://www.unitedwaysaskatoon.ca)

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

As a Campaign Representative, 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 your community.

#### **Set your expectations high.**

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

### Step 2: Know Your Campaign Details

- When is your campaign kick-off/wrap-up (and other key dates)?
- Does the earlybird draw have a prize/incentive?
- When are the special events?
- What is your employee campaign/participation goal?
- How much money was raised last year?
- How many donors did you have last year?

### Step 3: Make the Ask

One-on-one, peer-to-peer is the best way to make the ask. It allows you to inquire about their interests and inform them about how their dollars make a difference. The strongest campaign asks 100% of their employees and retirees to donate to United Way.

#### **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.

#### **Answer questions.**

Listen carefully to any concerns and answer questions as honestly as possible. If you do not know the answer, make a note of it and contact your United Way staff partner or Loaned Representative.

#### **Ask for the donation.**

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.

### Step 4: Say Thank You

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

**“Behind every changed life is someone who made it happen”**



## Steps to a Successful Leadership Giving Campaign

Leadership Giving is a United Way program for individual donors who make annual gifts of **\$1,200+** which is a new level this year. The change in amount signifies our community's growing needs and brings consistency to United Ways across Canada. Promoting Leadership Giving among your colleagues is the best way to increase the success of your organization's United Way workplace campaign. These best practices, together with our online resources, are effective tools for your campaign.

### Step 1: Request management support

- Meet with your CEO to request his or her personal involvement in the Leadership Giving Campaign.

### Step 2: Recruit and train a team

- Ensure you have enough Campaign Representatives to canvass potential Leadership donors one-on-one. We recommend peer-to-peer canvassing with each Campaign Representative approaching approximately 10-15 donors.

### Step 3: Develop a plan

- Meet with United Way to review your campaign's Leadership Giving history and to help plan your campaign.
- Identify your existing donor base—review the list of past Leadership donors and check which individuals are still present in your organization.
- Identify prospective donors by salary range, title, organizational level, etc. and set goals for the Leadership Giving Campaign based on dollar amounts and the number of Leadership donors.

### Step 4: Make the ask

- The ask is the most important part of the Leadership Giving Campaign. Whether the presentation is at a special event or during an existing meeting, consider the following:
  - Ask the CEO to participate.
  - Invite a United Way Leadership presenter to speak about the impact of a Leadership gift. United Way has a group of prominent business and community leaders who would be willing to volunteer their time to talk to employees about United Way.
  - Visit each Leadership donor. Ask for 100% return of pledge forms whether or not people choose to make a gift. This helps you later with your follow-up strategy.

### Step 5: Monitor the progress of your campaign

- Develop a tracking system and monitor returns on an ongoing basis.
- Follow up with outstanding donors until the gift is secured or the donor clearly indicates he or she is not contributing this year.
- Regular communication with your assigned United Way staff partner or Loaned Representative.
- Submit pledge forms and list of outstanding donors to United Way as soon as possible to ensure timely thank you to donors.

### Step 6: Say thank you

- Donors need to know their generosity makes a difference in the community and that their gift is appreciated.



## Creating Awareness

Looking for ways to bring your campaign to life? Try incorporating a variety of promotional strategies to generate excitement and get employees involved. Increased awareness can have a tremendous effect on your campaign's success.

### Idea 1: Themes

Many organizations create a new theme for each year's United Way Employee Campaign to make it more participatory and fun. Themes are a great way to tie your campaign activities together. Be sure your theme reinforces rather than competes with the look, feel and message of United Way.

Themes could include:

- Super Hero Theme—Real Heroes Work Here!
- Be a Lifesaver—Give to United Way (hand out Lifesavers with pledge forms)
- The Dream Team—Making Dreams Come True
- A Little Help From My Friends
- Mission Possible

### Idea 2: Campaign Kick-Off

This is your opportunity to inform and inspire your employees with a presentation from United Way. It's also a great chance to announce your goal and unveil your goal thermometer.

Your Kick-Off should include:

- CEO and management team
- Union Representative (if applicable)
- ECC & Campaign Team
- United Way Representative
- All staff

Presentations should include:

- United Way video
- Speaker
- Highlight of campaign logistics
- Leadership message

### Can't get your colleagues to an event?

Try a coffee cart. ECC's or Campaign Representatives hand out free coffee and pledge forms while starting conversations about United Way. Great for employees that work shifts or can't leave their desks for traditional events.

Go to an existing meeting. Ask for five minutes at your senior management, departmental, union, or all staff meetings.

### Idea 3: Special Events

It's all about timing! An ideal campaign has one or two events to create enthusiasm and build momentum. These may include an early bird draw and a grand prize draw. They should not take away from the employee pledges and are best scheduled after the pledge forms have been distributed. To help with your special events, United Way has supplies available through your staff partner or Loaned Representative (ie: tablecloths and aprons).

Special events should be:

- Limited in number—special events can be time consuming for you and your Campaign Team. And, they often result in low returns on participation. Having fewer, more exciting events is always a better choice.
- Fun and free—employees do not wish to be asked to donate repeatedly throughout the campaign. Events that cost money (ie: silent auction) should always be held at the end of your campaign.
- Awareness builders—the best special events help raise awareness about United Way and your employee campaign.



## Creating Awareness

### How to make special events work

Nickel and Diming: Betty pays \$3 to enter the Office Olympics, \$7 for raffle tickets and \$5 for Be Seen In Jeans. Betty feels like she has already made her donation and does not submit a pledge form.

### Total donation = \$15

Pledge-Based Incentives: Betty is encouraged to fill out her pledge form (for any amount) to get an All Access Pass which includes entry into all Office Olympics challenges, Be Seen In Jeans, and five free raffle tickets. Betty pledges \$1/day = \$365 gift and freely enjoys all the fun!

### Gain for your campaign = \$350

To encourage pledges, make all events free admission if their pledge form has been submitted.

### Idea 4: Incentives

Offer early bird incentive prizes for pledge forms returned by a specific deadline. Consider approaching customers or suppliers for prizes.

Some ideas for raffle and contest prizes:

- Vacation day(s)
- Gourmet lunches delivered to work
- Professional spa services
- Extended lunch breaks
- Coveted parking spots
- Lunch with the CEO
- Restaurant or mall gift cards
- Tickets to movies, sporting or cultural events
- Company merchandise
- Donations from your organization's vendors
- Complimentary cafeteria lunches





## The 20-Minute Kick-Off Meeting

Group Kick-Off presentations are the most effective and efficient way to reach all employees and to help them understand the work of United Way and how their contributions impact the community. It takes as little as 20 minutes to convey key messages to your group, present a Leadership presenter or United Way speaker, or show a United Way video. Be sure to ask employees to give when they receive their pledge forms.

Please call your United Way staff partner or Loaned Representative to arrange for a United Way speaker or Leadership presenter to attend your meeting. Remember—people give to people, so don't overlook this critical step. Consider asking a fellow employee to speak about his or her United Way experience(s).

Sample Agenda	Responsibility	Time Allotted
Opening Remarks – ECC Thank participants for coming and launch campaign		
CEO and Union Endorsement Corporate commitment to United Way Management and union support for the campaign Request each employee to support the campaign and to consider giving at the Leadership level Introduction of United Way Speaker or Leadership Presenter		
Leadership Presenter or United Way Speaker		
United Way overview – United Way staff partner or Loaned Representative		
United Way Video		
Closing comments Thank speakers Thank participants for attending Remind employees of special dates (early bird draws, BBQ's, etc.)		





## GOT QUESTIONS?

Need someone to bounce ideas off of? Give us a call!

Your United Way staff partner or Loaned Representative are great resources to ensure your campaign is a huge success!

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