

LOANED EMPLOYEE TRAINING MANUAL

2022

LIVE UNITED



Monadnock United Way

Monadnock United Way

23 Center Street
Keene, NH 03431
603-352-4209
muw.org

MONADNOCK UNITED WAY

Campaign Cabinet Volunteer Meeting Schedule 2022

Meeting and Timeline Commitments

Required Training and Meetings

- **Program Orientation and Training**
 - General Campaign Co-chairs—July 27th, 1pm to 2 pm via Zoom
 - Loaned Employees—September 13–15th via Zoom 9:00 am to 10:30 am
- **Hybrid Live/Virtual Campaign Kickoff**—September 20, 5:30 pm to 6:30 pm at The Showroom, broadcast on Facebook and YouTube
 - GCCs are required to attend in person; arrival time will be 2 pm to facilitate two run throughs before going live
- **Weekly Report Communications**— Volunteer and Community Engagement Manager will pull weekly account reports (Monday) and email Loaned Employees for updates on current status. At this time Volunteer and Community Engagement Manager will also provide an update on the Campaign overall as well as any other related information and updates. *Account updates are due from the Loaned Employee no later than the Friday of each week.*
- **Biweekly Campaign Report Meetings**—Held via Zoom
 - 8:30 am to 9:00 am starting Tuesday, September 27 and ending Tuesday, December 27

Other Important Dates

- **Campaign Volunteer Meet and Greet**—TBD
- **Campaign**—Runs September 20 to December 31. Note that a few Workplace Campaigns may run into January. Time commitment ranges from 2 to 4 hours per week total.
- **Flash Mob**—September 8 (rain date of September 12)
- **Day of Caring**—September 30
- **Giving Tuesday**—November 29
- **Campaign Volunteer Thank You**—TB

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<input type="checkbox"/> Be clear and consistent, positive and precise.	30
<input type="checkbox"/> Like the Monadnock United Way Facebook page, follow us on Twitter and Instagram. 30	
<input type="checkbox"/> Share and Like! Check out our partner agencies Facebook pages and share the ones that speak to you on your own page.....	30
<input type="checkbox"/> Take pictures of successful Kickoff Event activities and talk up the positive activity on social media. Just be sure that it's okay with the business or agency before you post any pictures. Remember to tag the agency or company in the post.	30
<input type="checkbox"/> Make sure grammar and information are correct, that any links shared are valid, and that your message is clear.	30
<input type="checkbox"/> We love enthusiasm! Be original and have fun! Let your personality shine.	30
<input type="checkbox"/> Don't be spammy. Unless it's a sandwich, no one likes this. Be careful not to inundate your audience with too much information.....	30
<input type="checkbox"/> Pay attention to comments! Reply back with a Like or a quick comment if appropriate. 30	
<input type="checkbox"/> Use the hashtag #liveunited How do you Live United? Give, Advocate, Volunteer! Let people know and be proud of the change you're helping to initiate.	30

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Welcome to LE Training and the Monadnock United Way Campaign!

Thank you for joining us! I am excited to have you on board and greatly appreciate the critical support you will provide during this year's campaign.

As Loaned Employees, you are the hand-raisers and game-changers who know that United We All Win. With your help, local businesses and their employees will help us fight for children, education, and financial stability in every community in our region.

Collectively, we will make a difference and create a stronger, healthier, more vibrant community.

This handbook will provide you with the tools and information you need to motivate donors to follow their hearts and give as generously as they are able.

I look forward to working with you throughout the campaign as you complete your good work.

You can contact me by email kate@muw.org or by phone at MUW 603-352-4209 ext 28.

MUW staff and Board are all here to help you as you prepare for and enjoy a truly positive and rewarding campaign experience: lending your strength to strengthen our community. Again, many thanks for joining us!

Sincerely,

Kate Cote

Volunteer and Community Engagement Manager
Monadnock United Way

Monadnock United Way Overview and Background



Monadnock United Way

WHO'S WHO AT MONADNOCK UNITED WAY

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ABOUT MONADNOCK UNITED WAY

Monadnock United Way is dedicated to improving lives by mobilizing diverse partners and investing in programs and people to create long-lasting, measurable change.

MUW, founded in 1952, is a local member of the United Way Worldwide network.

We have the resources, training, support and ideas of a worldwide community behind us. Yet our power to address the Monadnock Region's most daunting social issues is 100 percent local.

For more than 65 years, MUW has been committed to creating better lives for all in our region. Our five-year strategic plan, released in 2016, provides a roadmap for investing in our community. Historically, we have invested in programs. Today, we focus on issues such as child neglect, educational gaps, and the need for financial supports while helping to ensure that foundational needs, such as food and shelter, are available for those in need.

WHY We Invest in Children, Education, Financial Stability

In 2012, the Monadnock United Way and the New Hampshire Charitable Foundation partnered with the NH Center for Public Policy Studies to conduct extensive research with a goal of uncovering gaps in the well-being of people living in the Monadnock region.

Of the many factors that influence a community's well-being, the three foundational areas of children, education and financial stability were identified as high priority issues that MUW is uniquely positioned to address.

HOW We Invest

We invest strategically in programs and collective initiatives we believe will achieve specific outcomes in our three focus areas. In addition to the focus areas, MUW invests in programs that meet the basic needs of community members: food, shelter, heat, and transportation.

We invite individual agencies and collective initiatives to submit funding proposals. Funding recommendations are made by our Investment Process Teams – groups of volunteers who spend more than 100 hours each year reviewing, analyzing and evaluating all grant applications for the most effective and promising solutions that support our focus areas.

We also directly fund Impact Monadnock, MUW's signature early childhood initiative.

MISSION, VISION, AND VALUES OF THE MONADNOCK UNITED WAY

Our Vision

A United community where all are cared for and thriving.

Our Mission

Monadnock United Way is dedicated to improving lives by mobilizing diverse partners and investing in programs and people to create long-lasting, measurable change.

Our Values

- **Collaborative** We arrive as equal partners, committed to doing good, especially when it's hard.
- **Transparent** We are truthful and honest with ourselves and with the community.
- **Sustainable** We choose paths that strengthen our community now and into the future.
- **Respectful** We are considerate of others' opinions, position, background and experience.
- **Trust** We center our relationships and actions on openness and honesty. It is the lens for all we do.

MONADNOCK UNITED WAY HISTORY

1952: What is now Monadnock United Way was established as the Keene Community Chest, symbolized by a red feather. The first campaign goal was less than \$40,000.

1963: The first executive director was hired.

1964: Many employers opened the way for payroll deductions.

1970s: An individual headquarters was established at 23 Center Street, and the name of the organization changes to Monadnock United Way.

1977: MUW set up the Referral Agent program so that businesses could have designated employees trained in referring fellow workers to social service agencies.

1980: Businesses began participating in the Loaned Executive program.

1984: Campaign expanded into western Hillsborough County.

1986: MUW merged with the Monadnock Health and Welfare Council, an agency which had developed as a means to coordinate social services. Along with the merger came the council's information and referral service, HELP-LINE.

1991: MUW took a lead role in planning a regional affordable housing symposium.

1997: In partnership with the New Hampshire Charitable Foundation, the Monadnock United Way received a \$250,000 challenge grant to help build an endowment.

2000s: The MUW Planned Giving Committee successfully raised \$250,000, meeting the challenge extended by an anonymous donor to help develop an MUW endowment.

2002: First \$2 million campaign held with a Wizard of Oz theme: "There's No Place Like Home."

2012: MUW, in partnership with the New Hampshire Charitable Foundation, convened a process for a comprehensive needs assessment of the region. The results showed that children, education and financial stability were three of the highest-priority areas the Monadnock region needed to address.

2016: MUW releases a five-year, community-backed strategic plan, highlighting its new focus on children, education and financial stability, and outlining an action plan for its shift to address those areas.

MONADNOCK UNITED WAY

CODE OF ETHICS

Monadnock United Way is committed to the highest ethical standards. Based on the unique trust placed in the Monadnock United Way to serve the public good, we have a special obligation to act ethically. Volunteers, staff, and representatives set an example for each other by their pursuit of excellence in high standards of professionalism and ethical conduct.

While no document can anticipate all of the challenges that may arise, this Code communicates key guidelines to assist Monadnock United Way volunteers, staff and representatives in making decisions that are ethical and in accordance with applicable legal requirements. All are encouraged to discuss any questions or concerns they have with the Board Chair or President.

- I. **PERSONAL AND PROFESSIONAL INTEGRITY:** A personal commitment to integrity in all circumstances benefits each individual as well as the organization. We, therefore:
 - Strive to meet the highest standards of performance, quality, service and achievement in working toward the Monadnock United Way mission.
 - Communicate honestly and openly and avoid misrepresentation.
 - Promote a working environment where honesty, open communication and minority opinions are valued.
 - Exhibit respect and fairness toward all those with whom we come into contact.
 - Ensure that all information, which is confidential, privileged or non-public, is not disclosed inappropriately.
 - Respect privacy rights in the performance of Monadnock United Way duties.

- II. **ACCOUNTABILITY:** Monadnock United Way is responsible to Partner Agencies, Affiliate Agencies, donors and others who have placed faith in Monadnock United Way. To uphold this trust we:
 - Promote good stewardship of Monadnock United Way resources.
 - Use organizational resources for purposes that serve the best interest of the Monadnock United Way.
 - Observe and comply with all laws and regulations affecting Monadnock United Way.
 - Avoid conflicts of interest, or even the appearance of a conflict of interest, which would tend to undermine the public's trust in the Monadnock United Way.

- III. **VOLUNTARY GIVING:** The most responsive contributors are those who have the opportunity to become informed and involved. Monadnock United Way therefore:
 - Promotes voluntary giving in dealing with donors and potential donors.
 - Refrains from any use of coercion in fundraising activities.

- IV. **DIVERSITY AND EQUAL OPPORTUNITY:** Monadnock United Way is committed to the principle of inclusion. Its goal therefore is to:
 - Value, respect and encourage inclusion of others without regard to age, sex, race, color, marital status, physical or mental disability, religious creed, national origin or sexual orientation.

MONADNOCK UNITED WAY FINANCIAL OVERSIGHT AND CONTROL

Monadnock United Way assures donors that we hold ourselves to the highest standards of professionalism, accountability and openness in the stewardship of donor dollars and financial management.

To this end, we have several safeguards in place to ensure an appropriate level of financial oversight and control, including:

- The use of accounting methods in compliance with standards set by the Financial Accounting Standards Board (FASB), an organization that recommends accounting standards for non-profit organizations and for-profit businesses
- An annual, independent audit by Oster & Wheeler, P.C., which reviews Monadnock United Way's compliance with FASB standards. A copy of the audit is available for review at Monadnock United Way office
- The public distribution for all requests of our financial statements
- A Finance Committee comprised of finance professionals who meet to review and approve our annual audit, and oversee and determine the appropriateness of all financial matters related to Monadnock United Way
- Compliance with a set of comprehensive standards established by United Way of America. These standards include requirements for financial reporting, transparency of operations and business planning
- Filing detailed financial information on an annual basis with the IRS and State of New Hampshire
- A policy that gives anyone associated with Monadnock United Way the opportunity to confidentially report known or suspected financial improprieties, or misuse of Monadnock United Way resources, without fear of retaliation

Donors can be confident when giving to MONADNOCK UNITED WAY.



UNITED WAY WORLDWIDE FACT SHEET

- For more than 125 years, United Way Worldwide has evolved to meet the needs of the times
- United Way Worldwide is engaged in 1,800 communities across more than 40 countries and territories worldwide, through independently led United Ways
- Each local United Way is focused on creating community-based and community-led solutions that strengthen the cornerstones for a good quality of life
- United Way Worldwide (UWW) raises over \$5 billion annually, impacting more than 50 million lives each year and coordinating the efforts of 2.6 million volunteers worldwide.

Monadnock United Way, as with all United Way's across the country, is independently managed and operated by a local board of volunteers from throughout our region.

The benefits of our relationship with United Way Worldwide include:

- The ability for our local United Way to receive funds for our annual campaign from United Way Worldwide as the result of nationally run employee campaigns
- National advertising and brand awareness
- Excellent training opportunities
- Staff & volunteer conferences
- Sharing of best practices, data comparisons, and benchmarking
- Negotiated discounts on business services as well as United Way branded products

COMMUNITY INVESTMENT PROCESS

Investments

Monadnock United Way (MUW) grants funding to eligible non-profit agencies through a volunteer-driven Investment Process. This process ensures fiscal and program accountability while supporting the needs of human service agencies the Monadnock Region. ***The Investment Process is designed to be accountable to the donor, responsive to community needs and demonstrate results.***

The Investment Process depends on teams of volunteers who assist MUW in reviewing applications for funding, conducting site visits with the applicants, drafting summary documents that identify program strengths and opportunities, and ultimately providing funding recommendations to the MUW Board of Directors.

The rigorous review process for each application focuses on four key areas:

- Program Implementation & Measurement
- Governance
- Administration
- Finance

MUW seeks to invest wisely in programs that can deliver high-quality services that provide maximum benefit to the people and communities they serve. Programs receiving MUW funding must be able to demonstrate the impact of their services through strong performance measurements that speak to the achievement of intended outcomes.

Reporting & Compliance

Programs receiving MUW funding sign a Partnership Agreement in which they agree to submit biannual reports on program performance.

Reports are reviewed by MUW staff and shared with assigned Investment Team volunteers to:

- Ensure compliance with the Partnership Agreement;
- Evaluate actual performance against projected goals;
- Understand new opportunities and/or challenges experienced by the program; and
- Learn other ways in which MUW can support the program to increase its capacity to serve.

FREQUENTLY ASKED QUESTIONS

Please familiarize yourself with the following information and talking points. These are meant to be educational in the chance that you are asked about the difficult funding decisions that were made by MUW in February 2020.

Q. What is MUW's Vision?

A. We envision a region free of child abuse and neglect and filled with opportunities for education and financial stability so that people of all ages can realize their dreams.

What has happened since you launched your 2016 Strategic Plan?

In 2016, MUW conducted a months-long strategic planning process with community stakeholders that included research of our community's well-being, donor preferences and best practices. Our goal was to invest donor dollars in areas that, together, would have the most positive impact possible. Research conducted in 2012 pointed to three key areas of need: Children, Education and Financial Stability. Then, as now, the data reveals some stark truths:

- Our region has the third highest rate of child abuse and neglect in the state
- Children in this region score lower than the rest of the state in English and math
- The poverty rate in Cheshire County is 1 in 4. In the rest of NH the rate is 1 in 5

Community Impact (CI) was chosen as the foundation of our model. CI brings programs together to work toward shared goals and activities. It minimizes duplication of services and maximizes outcomes for the people being served.

In tandem with our partners we embarked on a multi-year transition process, aimed at providing each of our partners a path to success. We systematically scheduled allocations over a 3-year period while providing training and transition funding for partners.

During this time, we increased our fundraising efforts – through the workplace campaign, through online outreach, and by seeking new philanthropic streams of support.

Q. What is the state of MUW's Workplace Campaign?

A. We had anticipated that enhancements and increased energy in the workplace campaign would increase community support and return the campaign to its former height of \$2 million annually. Unfortunately, the campaign has continued to steadily decline. Trends include:

Ten years ago:

- The workplace campaign raised \$2.1 million
- Two workplace campaigns raised over \$200,000 and two raised over \$100,000
- 4,700 individuals donated to MUW

Today:

- The workplace campaign raised \$1.3 million
- One workplace campaign raises over \$100,000
- 2,900 individuals donated to MUW

Q. Are there fundraising streams that show growth or promise?

A. Yes. We have seen growth in the following areas:

The new funding streams are showing promise and steady growth with \$160,000 raised in 2019 from sources outside of the campaign.

- In 2019, our community raised \$160,000 over and above campaign gifts from individuals and foundations to support Impact Monadnock, our early childhood initiative to prepare children for academic, career and life success
- Giving by our most generous supporters has increased by 28% in the past three years

Q. What are the factors behind the decline in giving?

A. National giving trends

Donor and corporate behaviors are changing, and our annual fundraising campaign reflects what is happening nationwide. While the amount given to charity was up 1.6% from 2017-18, the total number of givers has declined, a trend that started in 2004. Increasingly, wealthier individuals are giving more while those who give between \$1 and \$999 are declining 4% nationally between 2017-18.

Workplace giving trends

Many companies are significantly reducing or eliminating traditional workplace campaign activities that highlight local human service organizations. Locally and nationally, employers want to give their employees greater choice when it comes to philanthropy. Many opt to use generic on-line giving platforms that highlight a broad range of charities in place of a United Way Campaign. Some companies who still hold United Way Campaigns opt to make pledge forms available but schedule minimal activities. Without the opportunity for employees to meet leaders of locally-based charitable organizations and learn how their donations affect people living in the community, giving declines. Personal connections to the local community decline as well.

Q. What has MUW achieved since launching the Strategic Plan?

A. During the last three years, we have moved steadily toward our vision of a region free of child abuse and neglect and filled with opportunities for education and financial stability. We have:

- Piloted a successful collective – the Monadnock Home Visiting Alliance
- Funded innovation with four new collectives
- Developed a clear framework, measurement system, and guidelines for our funded initiatives
- Provided group and individual training to build capacity for our partners
- Attracted state funding for early childhood into the region
- Become a statewide leader in the early childhood sector through Impact Monadnock

Q. With less funds being raised, what is MUW going to do?

A. MUW is committed to addressing the issues identified through our strategic planning research. Therefore, we must realign our annual investment to a size that is sustainable, impactful and reflects community support. Beginning in February 2020, MUW will invest \$900,000 in a highly targeted group of nine partnerships and activities that support the overall well-being of children and families in the following areas:

- Emergency housing and access to food, which is foundational to success in daily life,
- Early childhood success through supports including quality childcare, early learning and development of social-emotional skills, and
- Family resources including access to services, parent education and wrap-around supports.

Q. Who will you be investing in?

A. MUW will be working in a collaborative CI model with the following programs and activities:

- Cheshire County Emergency Housing Collaborative • Monadnock Food Pantries Collective
- Monadnock Home Visiting Alliance
- Monadnock Region Afterschool Collective
- Monadnock Parent Education Collective
- Financial Assistance for 6 Early Childhood Centers
- WIC Dental Program
- Impact Monadnock Pyramid Model Initiative

- Impact Monadnock Business Ambassadors

For detailed descriptions of each program, the partners within them and the grant amounts, visit muw.org/community-investments

Q. What will happen to the partners not listed above?

A. All other partners will receive funding through April 30, 2020. We will provide guidance as they seek out new sources of funds. This decision was difficult for MUW and our board to make. Every one of our partners plays an essential role in the health of this community.

Q. I designated my donation to a specific program. What will happen to my donation?

A. Designated donations will be honored and paid to those agencies without reduction. Agencies will receive designations from the 2019 campaign in full in June of this year.

Q. Why did you choose this particular group?

A. We believe we can make a greater impact by investing in a targeted group of programs that focus on the stability of families and children. While all of our partners support the success of children and families, we had to make some difficult decisions, as there were insufficient funds available. Q. Will these changes affect staffing at MUW? A. In the middle of 2019, MUW had 8.5 full-time equivalents. In 2020, we will consolidate roles to 6 full-time equivalents.

Q. How do you know that focusing on the stability of families and children is the right thing to do?

A. Research supports that stabilizing families has a tangible impact on children, today's workforce as well as the next generation. Here are a few of the research studies and results:

Perry Preschool Project

Nobel Laureate James Heckman's research shows that high quality investments in early childhood and families break the cycle of poverty and reap benefits for two generations. The second generation of children in this study are much more likely to:

- Spend 3X more time with stably married parents before age 18
- Complete high school without suspension
- Never be suspended, addicted or arrested
- Be employed full time or self-employed

RAND research

Two commissioned research projects around early childhood in New Hampshire were conducted by the RAND corporation over the last few years. These reports support investing in families and children through services such as home visiting and early childhood supports.

Q. Will the outcomes that MUW is looking for be short-term or long-term? Will measurements be shared?

A. The goals and outcomes are broad and long-term. MUW is looking to support community-level change, which takes time. Collecting performance measures and indicators will help track short-term progress toward long-term goals. Shared measurements will be important to keep programs aligned with common goals. Our annual Community Impact Report includes both broad community-level

measures (such as the rates of child abuse and neglect) as well as program-based performance indicators (such as the number of children whose literacy skills improved).

Q. Aren't you straying from your original focus on children, education and financial stability?

A. Together, the funded initiatives impact all three areas - both today and in the future. Children receive the support needed to grow, thrive and learn in safe, caring environments. That foundation supports strong educational attainment and the ability to move from poverty into financial stability. In addition to receiving parenting support and training, families and caregivers also gain access to the services needed so that they may be employed and stable.

Q. What is MUW's value for partners and for donors?

A. Although the campaign is declining, our commitment to the community remains the same:

- We will bring multiple sectors together to solve our region's toughest problems
- We will seek and invest in solutions that strengthen the fabric of our community today and tomorrow
- We will advocate and aggressively fundraise for the benefit of this community
- We will collaborate with our partners and support their success - and that of the individuals they serve
- We will transparently report our successes and challenges to you, our community

Q. How will the CI model make it easier for agencies to stay focused on their mission and do their work?

A. MUW's impact investment funding model encourages a collective approach between agencies to addressing our region's most pressing needs. Impact helps agencies achieve their missions through a high-level of collaboration.

Q. If MUW is applying for grants, aren't you competing with the programs you serve?

A. MUW has been, and will continue to be, intentional about grants. We review each opportunity to determine whether MUW or one of our partners would be best served by the grant. We have applied for funds on behalf of partners. We have co-authored grants in tandem with our partners. We write letters of support whenever partners need them for grant funding. And finally, we share grant info with partners who may benefit from applying.

Q. Is MUW funding only collectives?

A. The nine initiatives that MUW is funding includes a mix of collectives and individual programs. Collectives of three or more programs receive amounts of \$70,000 or more per year. Individual programs receive \$10,000 or more per year. These amounts are subject to change in future years as MUW's Investment Process evolves.

Q: What other research was conducted before you embarked on your strategic plan?

A: In 2012 MUW, The NH Charitable Foundation and NH Center for Public Policy Studies conducted extensive research and published a report called Community Well-Being in the Monadnock Region. A steering committee with broad community representation participated in this process. The report uncovered 15 challenges facing our region -- from healthcare, to education, to safety and security

and more. Of those, three focus areas rose to the top because of their significance and MUW's ability to convene the community in addressing them. They are: Children, Education and Financial Stability.

During the 2016 strategic planning process, MUW conducted research with the UNH Research Center and found that MUW is viewed as having a strong and trusted relationship with the community. In addition, our community wants to: invest in education, financial stability and children; support basic needs such as food, shelter, heat and transportation; and increase our focus on long-term strategies.

The Role of the Loaned Employee

LIVE UNITED



Monadnock United Way

2022 LOANED EMPLOYEE CLASS

Amy Chickering, Savings Bank of Walpole, achickering@walpolebank.com

Grace Griggs, The Timken Company, grace.griggs@timken.com

Conor McKee, The Timken Company, conor.mckee@timken.com

James Whittier, Janos Technology, james.whittier@janostech.com

BENEFITS TO THE LOANED EMPLOYEE

- An opportunity to develop executive leadership and to strengthen management skills, as well as public speaking, team building, project management and analytical skills.
- An increased knowledge of community health and human service issues and the satisfaction of seeing firsthand how volunteer efforts address those issues.
- An opportunity to network and develop working relationships with top community leaders.
- The ability to broaden contacts and the challenge of adapting to new situations by working with individuals from multiple and varied organizations.

BENEFITS TO THE SPONSORING ORGANIZATION

- Provides the employee with a broader background, enhanced skills, and a greater understanding of community needs.
- Promotes the organization's commitment to the Monadnock Region through good community relations and exposure.
- Promotes awareness of the organization's investment in the community.
- Strengthens relationships with other organizations as a result of the contacts made by the Loaned Employee.
- Recognition for participation in United Way newsletters and special events.

BENEFITS TO MONADNOCK UNITED WAY

- Extends the effectiveness of staff and keeps fund-raising costs low.
- Dramatically increases results in the annual campaign.
- Broadens pool of volunteer leadership and effectively represents Monadnock United Way to the community.
- Provides for a source of well-informed and trained community leadership for the future.

LOANED EMPLOYEE GUIDELINES

General Information

1. Monadnock United Way is open from 8:30am to 4:30 pm, Monday through Friday. Please feel free to stop in, email, or call when you need office support or assistance.
2. If you are unable to fulfill a commitment, *immediately* contact the Volunteer & Community Engagement Manager at the MUW office and make arrangements for another Loaned Employee to stand in for you.
3. You will be given a list of agency speakers—representatives from our partner agencies—willing to attend company kickoff events. Please contact these individuals directly to arrange for speaking engagements at the companies you are supporting.

Key steps

1. Service the organization you are supporting: make sure they have all the supplies they need for their campaign, offer to pick up their reports, pledge forms and money, and deliver them to the MUW office. Do whatever you can to make them feel good about participating in this year's campaign.
2. Get to know the Employee Campaign Coordinator (ECC) in all of the companies you're working with. Ask them if you can set up a preliminary "get acquainted" meeting with each of them. The Volunteer & Community Engagement Manager will assist with these introductions.
3. From the very beginning, *establish deadline dates* with all of your accounts (dates when everyone agrees that the campaign will kick off, when it will be complete, and when all reports/money will be turned in).
4. Carefully document your experiences with each company and report to the Volunteer & Community Engagement Manager weekly. The information you gather will be used by future volunteers and during communications. Your feedback is very valuable!
5. Keep in clear communication with the Volunteer & Community Engagement Manager at MUW. Let them know of any successes and roadblocks as soon as they come up.

LOANED EMPLOYEE RESPONSIBILITIES to MUW and the Companies You Will Support

- To attend and actively participate in the Orientation and Training program.
- To gain a working knowledge of Monadnock United Way and its partner & affiliate agencies.
- To review Company Giving Histories for the companies with which you will work and develop action plans to accomplish specific campaign goals detailed by the Employee Campaign Coordinator (ECC).
- To maintain contact with and support the Employee Campaign Coordinator (ECC) at each company as you help them plan, organize, and conduct an effective campaign among their executive and employee groups. (Including providing them with all the necessary campaign materials.)
- To strive for an informational program within each company for the purpose of educating the employees about Monadnock United Way partner agencies, their programs and services.
- To deliver a powerful Monadnock United Way presentation at employee meetings and kick-off activities whenever possible.
- To report to Monadnock United Way the progress of each of your accounts throughout the campaign.
- To maintain records of the activity with each of your assigned accounts.
- To follow-up on administrative and financial aspects of your campaign assignments by agreed to deadlines.
- To provide recognition to companies and individuals for their support.
- To offer a detailed summary of the activities that took place during their campaign and provide feedback and recommendations for future campaigns.
- To attend MUW campaign kickoff, functions, activities, etc.

PROFESSIONAL COMMUNICATION TECHNIQUES

As a Loaned Employee, you will function as an ambassador for the Monadnock United Way. Your role involves a great deal of communication with the representatives of your assigned accounts, whether that be a phone call or an email. You can project a professional email and telephone manner and increase your effectiveness in reaching your objectives by observing some basic guidelines:

- Treat every communication as if it were from the most important client in your file or to the most important prospect you have. Practice courtesy from the moment you initiate contact.
- Be sincere in what you say and cheerful as you say it. The person at the other end of the line thinks of YOU as the Monadnock United Way.
- The best way to sound friendly is to actually smile as you talk. If you are sincere, pleasant, and confident, you will increase your chances of achieving the goal of your communication.
- Your audience must become attuned to a new contact, and this takes time. Be clear and detailed but not overwhelming.
- Identify yourself and your purpose: if you are contacting someone you know, don't assume that you will be recognized. Avoid a "guessing game" regarding your identity.
- Be prepared when taking incoming calls or making outgoing calls. Have paper and pen/pencil, reference material, etc., handy. Be alert for side noise and other distractions in your work area and take steps to reduce or eliminate them.
- Stay to the point. Long conversations and repetition can become irritating. Make your communications brief and to the point without being brusque or curt.
- Plan communications in advance, organizing the points you want to cover.
- When your objective is to obtain an appointment, focus on just that. Be respectful of each party's time and stick to your agenda.
- Practice your approach until you're comfortable with your words and fluency and feel confident and easy in your manner. This confidence will have a positive effect on your contacts.

BEING A SOCIAL MEDIA AMBASSADOR TO MONADNOCK UNITED WAY

- Be clear and consistent, positive and precise.
- Like the Monadnock United Way Facebook page, follow us on Twitter and Instagram.
- Share and Like! Check out our partner agencies Facebook pages and share the ones that speak to you on your own page.
- Take pictures of successful Kickoff Event activities and talk up the positive activity on social media. Just be sure that it's okay with the business or agency before you post any pictures. Remember to tag the agency or company in the post.
- Make sure grammar and information are correct, that any links shared are valid, and that your message is clear.
- We love enthusiasm! Be original and have fun! Let your personality shine.
- Don't be spammy. Unless it's a sandwich, no one likes this. Be careful not to inundate your audience with too much information.
- Pay attention to comments! Reply back with a Like or a quick comment if appropriate.
- Use the hashtag #liveunited How do you Live United? Give, Advocate, Volunteer! Let people know and be proud of the change you're helping to initiate.
- Remember to tag Monadnock United Way as well!
[Facebook.com/MonadnockUnitedWay](https://www.facebook.com/MonadnockUnitedWay)

WORDS OF WISDOM FROM PAST LOANED EMPLOYEES

Staying Organized

- Start early. Reach out to your contacts ASAP. Get as much work done as early as possible.
- Make your calls on a regular basis. Set aside time each week to make them.
- Don't assume you'll get calls back; make your follow up calls.
- There is a lot of momentum at the beginning. Take advantage of it and start early.
- Actual "lose your mind" time is mid-September. This is after kickoff when most companies will want to run their campaigns and will be calling on you the most. Staying organized will help you immensely!
- Create high expectations for your goals. If you aim high every time, you're more likely to get it!
- Be very, very organized. Create a calendar of events, deadlines, and needs. Check it often!
- Be patient. Be prepared for your companies to be disorganized; have extra supplies on-hand for when you need them.

Campaign

- Reach out to your contacts ASAP – do not wait! Some coordinators are very difficult to contact.
- Tailor the presentation to what you feel comfortable with. Make it your own. You can't present something well if it's not your voice.
- If your companies want an agency speaker, see if they know who their staff would relate to the best. A greater impact is made when the audience has an interest in the presentation.
- Stay in touch with your accounts. Lead the way and inspire others by showing how much YOU care.
- If someone asks a question you don't have an answer for, write it down and follow up with them as soon as you can.
- Remember, MUW represents not just Keene, but the entire Monadnock Region.

Group Support

- Brainstorm and work with fellow LE's and MUW staff to find solutions.
- Don't be afraid to ask for help.
- Take a deep breath when you need to.

Fun!

- Have fun! This will be work, but it will also be a great experience.
- It may get a little crazy at times but remember to enjoy it!
- Make the presentations and outreach your own.

TRACKING YOUR VOLUNTEER HOURS

Why It's Important

- A volunteer's donated time is very valuable to a nonprofit
- We want to be able to report out what the return on investment (ROI) is for all your hard work
- Knowing the hours you worked as a volunteer helps shed light on the impact of your work on our community and mission
- Helps MUW make our volunteer programs stronger by knowing where you spend your time
- You can report back to your employer and be proud of your contribution to community impact

How to Track Your Hours

- Use MUW's simple hour tracking sheet
- Fill it out each time you work on an MUW project
- Include your hours with your weekly email report to the Campaign Manager

The Workplace Campaign

LIVE UNITED



Monadnock United Way

MUW MESSAGING 2022

Theme

United We All Win

Lead-ins and Responses

Lead ins:

- Together, we....
- United together, we...

Answers [for use as needed]:

- ... Make change possible
- ... Are fundraisers, hand raisers and game-changers
- ... Are the gamechangers
- ... Are the hand raisers
- ... We are problem solvers
- ... We find problems and solve them
- ... Face hunger
- ... Face homelessness
- ... Face poverty
- ... Face child abuse and neglect
- ... Prepare children for success
- ... Prepare people for success
- ... Prepare people for success in school, work and life
- ... Step up for people in need
- ... Strengthen our communities
- ... Lift up our community
- ... Live better by Living United

Core Messaging

United We All Win...Fundraisers, Hand-Raisers & Gamechangers

You changed the game last year. People received food and emergency shelter. Child care centers remained open and viable. Families received essential services. Our partners, our initiatives and the community flexed time and again to help every person possible – because of your generosity.

Today, we begin to rebuild. Yet we face some hard realities brought to light by the pandemic. Realities that existed before Covid-19 and continue with no end in sight.

Post-pandemic, our region is faring worse:

Post-pandemic, too many of our neighbors still face serious hardships:

Too many of our neighbors have faced these hardships for too long:]

- We have the third highest rate of child abuse and neglect in the state
- Our children score lower than the rest of the state in English and math

- 25% of our residents are low-income while the rest of NH the rate is 20%

Poverty, abuse and low educational achievement reinforce each other; creating a downward cycle that harms a community and destroys its vibrancy. The damage seeps in over time, often taking a generation to become obvious. We can't wait that long to act.

Together we can eliminate and change these realities forever.

United We All Win when we:

- Tackle hunger, homelessness, poverty, and child abuse
- Step up to strengthen our community every single day
- Prepare our neighbors for success in school, work, and life

With your support, we can address today's problems and create a strong community for tomorrow.

Give today because: United We All Win

Talking Points

Campaign Goal - \$1,490,990

- MUW's 2022 Campaign Goal of \$1,490,990 helps address today's issues while solving root causes of poverty, child neglect, and low educational achievement in our region through Collective Impact.
- Our community raises fund throughout the year and contributors to this total include:
 - Annual Campaign – an honored tradition and incredible testament to our community
 - Service organizations and community members hosting special fundraisers
 - Grants from foundations and businesses
 - Generous sponsorships

Grant Funded Initiatives – (aka Restricted Grants)

In addition to the Annual Campaign, MUW's Collective Impact model attracts grants from State and Federal Government, foundations, and regional partnerships. These targeted gifts allow us support programs more deeply, reach more people, and move more quickly toward our goals.

Q: How does MUW fulfill its mission?

A: MUW brings people and programs together to work toward shared goals and activities. It minimizes duplication of services and maximizes outcomes for the people being served.

Through this Collective Impact (CI) model, people from nonprofit, public and private sectors come together to address a specific problem and find solutions. We unite members of our community to work together to address identified needs that will strengthen and solve issues related to Children, Education and Financial Stability. Examples of CI in action are the development of several collectives supported by MUW:

- The Monadnock Alliance for Families
- The Monadnock Region After School Collective
- The Cheshire County Emergency Housing Collaborative
- The Monadnock Food Pantries Collective
- Impact Monadnock

Q: What is MUW's Vision?

A: Our collective vision is a region free of child abuse and neglect and filled with opportunities for education and financial stability so that people of all ages can realize their dreams. A strong and vibrant community looks like this:

- Children live in safe, nurturing, healthy homes and communities
- Community members receive an education that enables them to achieve their full potential
- Community members have the financial resources they need to live healthy, happy and productive lives

Q: What steps are being taken to make that vision a reality?

A: MUW engages a cross section of stake holders in the region to create collaborative, community-wide solutions to problems that cannot be solved by a single agency alone. This collaboration has resulted in:

- Coordinated plans between multiple agencies
- Deep partnership between MUW and agencies
- Collaboration that helps agencies hone their strategies and make a bigger difference together
- Measurable outcomes to help agencies and donors see progress made in addressing our region's needs
- The ability for programs and agencies to leverage MUW dollars for matching grants

Q: How will the CI model make it easier for programs and initiatives to stay focused on their mission and do their work?

A: MUW's impact investment funding model encourages a collective approach between agencies to addressing our region's most pressing needs. Impact helps agencies achieve their missions through a high-level of collaboration.

Q: Is MUW investing only in collectives?

A: MUW invests in a mix of collectives, individual programs and community-based initiatives.

Q: What is MUW's value for partners and for donors?

A: Our commitment to the community is strong: We bring multiple sectors together to solve our region's toughest problems

- We seek and invest in solutions that strengthen the fabric of our community today and tomorrow
- We advocate and aggressively fundraise for the benefit of this community
- We collaborate with our partners and support their success – and that of the individuals they serve
- We transparently report our successes and challenges to you, our community

Covid-19 is almost over. Why should I give to MUW?

Covid-19 has exposed serious underlying issues in our community that must be addressed for the short and long-term. MUW is engaging our community in reimagining and rebuilding a stronger, equitable and even more vibrant region for everyone.

I already gave through another initiative, why should I give campaign too?

If you have already given this year to another initiative, thank you! We hope you will help continue to join us in the incredible and deeply-rooted tradition of MUW's annual campaign with an additional gift. Your generosity provides helps us fight for children, education and financial stability in every community throughout our region.

How many programs and initiatives does MUW support?

MUW invests in over 30 programs and initiatives across the region that address needs for children, education and financial stability in every community throughout our region.

How many towns are served?

MUW serves 37 towns in the region. Visit our [Service Map](#) for a complete listing.

Give Today!

- Online at: muw.org
- Text: MUW to 41444
- Payroll deduction: See your HR department
- Mail: MUW, 23 Center Street, Keene, NH 03431

SAMPLE EMAIL TEMPLATE

Initial email

Remember this is just a template! Use your own voice and insert talking points as appropriate.

Greetings!

My name is _____ and I am volunteering for the Monadnock United Way's annual fundraising campaign. I am this year's Loaned Employee for your workplace campaign, and I look forward to working together.

I am reaching out regarding your 2022-23 annual campaign. Thank you so much for your on-going support of Monadnock United Way and their partner agencies! As you know, this year's campaign is more important than ever. Not only are people in this region experiencing hardships brought on by Covid-19, MUW partner agencies still need to provide their critical programming.

I am hoping that you have a few moments to chat about the details for your MUW workplace campaign? I am available via phone and email, whichever is easiest for you.

Just a reminder that our campaign ends on December 31st. It is urgent that we work together to complete your campaign as soon as possible to help us meet our campaign goal of \$1,490,990.

Thank you so much!

STEPS TO SUCCESSFULLY MANAGING A CORPORATE ACCOUNT

Do your homework

When you are assigned your accounts, research and review background information on the account using:

- MUW Firm Analysis report. Become familiar with the account's giving history and determine how the account has conducted past campaigns and whether there are any obstacles to overcome in planning a successful campaign.
- Check out the company website, Google, Facebook, LinkedIn, etc. You should have a rough understanding of the account's business. If scheduling an onsite planning meeting, you can also ask for a brief tour. As much as possible, develop an understanding of the organizational culture of the account as this can help set the tone for their campaign.
- Put finishing touches on your campaign presentation.

Managing your accounts

- Start early
- Make initial contact with the Employee Campaign Coordinator (ECC). The ECC is the key to success or failure in managing an account so it is critical that you cultivate a relationship with this person. You will need to motivate, educate and assist this key person in running the most successful campaign possible for their organization.
- Meet with the ECC (and Campaign Committee, if applicable) to plan their in-house campaign and deliver their campaign materials. Often the ECC will simply want to conduct the campaign the way it has always been conducted in their organization in the past. It is your responsibility to inspire and motivate the ECC by providing different campaign strategies and innovative ideas to improve the overall campaign. However, "if it ain't broke, don't fix it".

Your tasks will include

- Arrange for speakers for their kickoff
- Assisting to organize and develop incentive and event ideas
- Attend the in-house or virtual kickoff
- Monitor the campaign and be prepared to share a weekly summary of the campaign activity with MUW
- Collect and turn in corporate pledge envelope to MUW
- Write a thank you note to the Employee Campaign Coordinator and Company management. **sample template is in the appendix of this manual*

Other responsibilities and reminders

- Give yourself plenty of time
- Take extra pledge forms and campaign materials with you
- Know directions to the company – get there early
- Dress properly for your role
- Be sure video equipment is available and working
- Relax and be yourself!
- Celebrate your success!

WORKING WITH THE EMPLOYEE CAMPAIGN COORDINATOR

The Employee Campaign Coordinator (ECC) is often the key to success or failure in managing an account. Because of their pivotal role, it is critical for the Loaned Employee to cultivate a special relationship with the ECC. The LE needs to motivate, educate, and assist this key person in running the most successful campaign possible for his/her organization.

Often the ECC will simply want to conduct the campaign the way it has been conducted in his/her organization in the past. It is the LE's responsibility to provide a broader spectrum of campaign strategies and innovative ideas to improve the overall campaign.

Once a campaign plan has been formulated, it is the responsibility of the LE to arrange agency speakers and provide any other support material needed to conduct the campaign.

SAMPLE QUESTIONS FOR YOUR ECC

1. Describe your company culture (casual, conservative, family-oriented, serious, traditional etc.)
2. What is your company's Corporate Social Responsibility strategy? Can you integrate this into the MUW campaign?
3. How often do you have company-wide meetings, department meetings, etc.?
4. How can I help you achieve your goals?
5. Who at the management level is supporting you?
6. Is your company structured by departments, work groups, geographically, other? Consider structuring your campaign team along similar lines.
7. What issues are employees sensitive about? What do they care about?
8. Would your company be interested in volunteer activities?
9. How does your company celebrate success? How would they post the results of an MUW campaign?

WORKPLACE CAMPAIGN Planning Steps

Objective: To present a uniform Monadnock United Way message to a group of employees & inspire them to become MUW donors and supporters.

Benefits of Group Solicitation

- accommodates the work schedule of all parts of the organization
- shortens the employee campaign
- alleviates distractions in the work area(s)
- reduces perceived pressure
- uniform message—eliminates misunderstandings
- offers opportunity for all employees to contribute

Steps in Planning a Workplace Campaign Kickoff

1. Employee Campaign Chair to establish Management Role in Supporting the Kickoff
 - a. Endorsement of meeting
 - b. Invitation to meeting
 - c. Participation in meeting
2. Set Date(s), Time(s) and Place(s) with Employee Campaign Coordinator
 - a. Check CEO calendar first
 - b. Schedule on a day(s) with no other company conflicts
3. Analyze Audience
 - a. Tailor presentation to different groups attending
 - b. Dress appropriately for each audience
 - c. Raffles, events, incentives, etc.
4. Prepare Agenda/Visuals
 - a. Plan to share the United Way stories and videos with employees
 - b. Arrange for agency speaker, recipient of service, MUW staff
 - c. Confirm all speakers/presenters
 - d. Check on attendance with Employee Campaign Coordinator
 - e. Assemble additional materials you may need
5. Arrive Early
 - a. Prepare room, handouts, visual aids
6. Participate in Meeting
 - a. Present “your” Monadnock United Way story
 - b. Show video
 - c. Answer questions

SAMPLE CAMPAIGN AGENDAS

30 MINUTES

<u>PROGRAM</u>	<u>PRESENTER</u>	<u>TIME REQUIRED (Min.)</u>
Welcome and Endorsement of MUW Campaign	Chief Executive	3
Introduction of Employee Campaign Chair	Chief Executive	1
Endorsement of MUW Campaign	ECC	2
Introduction of Loaned Employee	ECC	1
Campaign Stories/video & LE Message	Loaned Employee	12
Introduction of MUW Guest Speaker	Loaned Employee	1
Personal Impact Presentation	MUW Guest Speaker	7
Closing Remarks: Conclusion of importance of programs, their impact, and the need for support. Thank You	Loaned Employee	3

15 MINUTES

<u>PROGRAM</u>	<u>PRESENTER</u>	<u>TIME REQUIRED (Min.)</u>
Welcome	ECC	1
Comments and Endorsement of MUW Campaign	Chief Executive	1
LE Message, intro of Guest Speaker	Loaned Employee	5
Personal Impact Presentation	MUW Guest Speaker	7
Closing Remarks: Conclusion of importance of programs, their impact, and the need for support. Thank You	Loaned Employee	1

WORKPLACE CAMPAIGN THEMES AND ACTIVITIES SAMPLES

Your Campaign can be so much more than just listening to a small speech and filling out a pledge card. Show the employees how much their donation is valued by making the campaign fun! The ideas below can help get your campaign off to a great start.

Select a Campaign Theme Whether your campaign lasts a day or a week, making the campaign fun is well worth the effort. Think of things that your employees would find engaging and rewarding.

How to make it work: Select a theme that will easily align with event ideas. Options include: Carnival/Circus, Casino Night, Historical Eras, or Sports.

Make it fun Tie your activities in with your theme for an enticing and entertaining event

How to make it work: Design an employee carnival. Set up games (such as spoon races, ring toss, or guess the jellybeans), provide fair food, or even rent a dunk tank!

EVENT IDEAS

Food brings people together Whether you have a cookout or a cookoff, your initial campaign meeting needs to grab your employee's attention and encourage them to attend.

How to make it work: Host a cookoff contest by asking co-workers to bring in their favorite crockpot recipe. For a small fee, employees can sample the dishes and vote on their favorite dish. Bragging rights for the winning recipe!

Healthy Competition A little friendly competition can bring out the best in your co-workers and your MUW campaign.

How to make it work: Run Office Olympics! Set up games like paper clip jump rope, office chair races, or trash can basketball. Allow teams to "buy" head starts and other advantages with all proceeds going towards your campaign.

Virtual Event Suggestions and Ideas

Fun brings people together Whether you host a virtual game day or trivia challenge, your campaign event needs to grab your employee's attention and encourage them to participate.

How to make it work: Host a virtual game day! Check out how at: <https://www.countryliving.com/entertaining/a31995635/virtual-game-night-ideas/>.

Healthy Competition Competitive challenges don't have to be done in person. You can still have fun while remaining socially distant and supporting your workplace campaign.

How to make it work: Run Office Olympics over Zoom! Set up games like paper clip jump rope, office chair races, or trash can basketball. Allow teams to "buy" head starts and other advantages with all proceeds going towards your campaign.

INCENTIVES FOR GIVING

Reward and incentivize donors Offer prizes in specific categories:

- First time donor
- Increased donor over their prior year's level
- Increased to leadership level (\$500 or above)
- Most years as a donor
- First pledge form returned
- Anyone who pledges on the first day of the campaign

How to make it work: Communicate about the special incentive prizes that employees can win *only if they donate to the campaign*. Keep this separate from other raffles. Incentive ideas include casual dress day, VIP Parking spaces, extra PTO days, company swag, or gift cards to local businesses.

FUNDRAISER IDEAS

A little extra incentive Everyone likes to feel good about giving back to their community. But if they can also win something? That's even better!

How to make it work: Keep the raffles open for the duration of the campaign or have a different raffle every day. Make the prizes something employees will really want to compete for! These raffles can be open to anyone, not just those who choose to donate to the campaign. Set raffle ticket prices low and make bidding unlimited! Ideas include:

- Themed Gift Basket Raffle (Movie Night, Lottery, Wine & Cheese, Board Games)
- HR raffles off items such as a paid day off, paid half-day off, priority parking space, sleep in late coupon, or a get out early coupon.
- Jeans Day—Employees donate \$5 to wear jeans on a selected day. Each additional item could be a \$1; for example, flip flops, t-shirts, etc.
- Corporate Car Wash—Upper Management becomes a car wash team for their employees. Employees donate \$5 to see their boss wash their car.
- Undercover Boss—Employees pay \$1 to vote for which department the company's president/CEO has to work in for a day

VIRTUAL CAMPAIGN EVENT SUGGESTIONS

With employees working remotely and social distancing standards in place, your Campaign might look a little different this year. You can still engage your employees, have some fun, and show them how much their donation is valued! The ideas below can help get your campaign off to a great start.

Fun brings people together Whether you host a virtual game day, trivia challenge, or a competitive challenge, your campaign event needs to grab your employee's attention and encourage them to participate. Prizes and incentives are very much encouraged! Here are some ideas on how to make it work!

- **Game Day:** Host a virtual game day! Check out how at: <https://www.countryliving.com/entertaining/a31995635/virtual-game-night-ideas/>
- **Office Olympics:** Run Office Olympics over Zoom! Set up games like paper clip jump rope, office chair races, or trash can basketball. Allow teams to “buy” head starts and other advantages with all proceeds going towards your campaign.
- **Chopped Challenge:** Prepare a surprise ingredients basket to deliver to participants. The participants then film themselves cooking their meals and reporting on the results. Judges can rule based on style, technique, and presentation.
- **Crafternoon:** Lead an afternoon craft project. Materials can be digital (check out [canva.com](https://www.canva.com) for things like free poster templates) or they can be delivered to participants in a contactless manner.
- **Online Tutorial:** Do you have a staff member with a hidden talent (painting, creative writing, gardening)? Or maybe there is someone who is perfect to help develop professional skills (public speaking, time management and organization, project leadership). Have them host an online class to teach others their secrets!
- **Painting Party:** Host a paint afternoon! To learn more, check out <https://www.paintingwithatwist.com/pages/twist-at-home>
- **Bingo:** Different bingo cards can be designed at myfreebingocards.com. Drawings can be done daily or at different times throughout one day. The winner of each game receives a prize! You can also turn this into a bracket-style tournament. <https://brackethq.com/>

EMPLOYEE CAMPAIGN CHAIR STEPS TO REPORT CAMPAIGN RESULTS

Campaign volunteers from MUW and within organizations are responsible for handling thousands of dollars in pledge forms, checks, and cash every year. It's an important responsibility and one that requires everyone to follow specific steps to ensure that every single donation is collected and accounted for properly.

These steps also help to protect you, the volunteers, as you prepare and hand-off the donations to Monadnock United Way.

The Employee Campaign Chair must:

1. Collect & sort ALL Pledge forms by categories of Paid in Full Pledges, Pledges with Billing/Payroll Deduction, MobileCause (spreadsheet provided by MUW), Corporate Pledge, and Special Events Fundraising.
2. Tabulate each group of pledge cards, complete the white "Corporate and Employee Report Envelope" with each group's total and enclose adding machine tape or spreadsheet of totals.
3. Photocopy of all payroll deduction pledge forms give to your payroll department. Send the originals to MUW.
4. Place individual and corporate pledge forms, personal checks, and cash donations into the Report Envelope.
5. Verify that the "Paid In Full Pledges" line equals total dollars enclosed.
6. Any Special Event fundraising (bake sales, raffles, etc.) should be totaled, noted on the envelope, and enclosed.
7. Enclose your signed blue corporate pledge card.
8. Complete all data on the report envelope and seal it.
9. Contact your Loaned Employee (LE), Campaign volunteer, or MUW staff to let them know your campaign envelope is ready to be picked up.
10. Sign and date the sealed envelope. Have the LE to do the same.
11. Photocopy the signed envelope for your records and keep a copy.
12. Loaned Employees and MUW staff will only accept envelopes that are filled out completely and sealed. If you need more time to complete your envelope, please let your LE know and schedule a new pick up time. Thank you!

The Loaned Employee Presentation



Monadnock United Way

TIPS TO MAKE AN EFFECTIVE PRESENTATION

Elements of persuasion

Your role as an LE is to encourage your audience to support Monadnock United Way. There are three main elements of persuasion you'll want to be prepared for:

1. **Establishing your character is the preliminary step in any attempt at persuasion.** Give the audience a sense of who you are. Know what you are talking about, be honest, professional and likable to your audience. Do this by telling stories about yourself. Let your audience know any true feelings you had about Monadnock United Way before you became involved. If you weren't a supporter, say so. It's important to let your audience know how you once felt, and to explain why you changed your way of thinking. Unless you can establish your credibility as a speaker, and make yourself personally attractive to your audience, you're not likely to gain their attention. Be yourself!
2. **Arouse the emotions of your audience.** Motivate people. Share with your audience your observations of any agency tour or speaker, tell them about a friend or co-worker who received help, or tell a personal story about how you received help. Use impact videos and stories from MUW.
3. **Give reasons for supporting Monadnock United Way.** Remember that facts and figures will only be accepted after you have established a receptive mood in your audience. The facts and figures you present will reinforce the emotional climate you have developed.

Concentrate on Monadnock United Way's efficiency and effectiveness:

- Contributions stay in the community, providing friends, family and neighbors with a broad safety net of services spanning from pre-natal care through to eldercare.
- Monadnock United Way is one of the most efficient charitable organizations in this community. We have the highest rating possible with both Guidestar and Charity Navigator.
- Hundreds of volunteers help raise and distribute contributions in the community, keeping costs low. Monadnock United Way raises money for partner agencies helping them focus on serving those in need.

Sample Opening Statements for Employee Campaign Meetings

- State that "I'm not here to get you to give money to MUW—I'm here to share with you how Monadnock United Way helps make the region a great place to live, work, and play."

- “On behalf of the Monadnock United Way partner agencies, I want to thank everyone for their prior year contributions...Your generosity provided help to one in four people in the Monadnock region.”
- “I’m here today to talk about an important investment opportunity with guaranteed return to you, your family members, neighbors, co-workers & friends...”
- Introduce yourself. Announce the company’s fundraising goal (this could be either a dollar amount or a percentage/participation goal).
- Start with a personal story of how the help of a MUW partner agency program helped someone.

Preparation Suggestions For A Successful LE Presentation Experience

- Give yourself plenty of time
- Take extra pledge forms and campaign materials with you.
- Know directions to the company—*get there early*.
- Dress properly for your role.
- Be sure video equipment is available and working.
- Relax and be yourself!

PRESENTATION CONSIDERATIONS AND TECHNIQUES

Your Outline

- Use Key Phrases
- Use Only One set of Notes

Use Visuals they increase retention, save time and stimulates the audience

Physical Delivery Techniques

- Strive For Naturalness, Conviction, Confidence, Enthusiasm
- Use Humor When Appropriate
- Get Interaction And Watch Response To Your Points
- Avoid Using Lengthy Written Material – Use Bullets
- Avoid Use of Pointer or other prop—this inhibits your natural movement and gestures
- Talk to The Point (be concise) —And Use Analogies and Word Pictures

Controlling Nervousness

- Release Your Energy Through Gestures
Body, Arms, Hands, Face, - Not Pacing
- Generate Early Audience Response/Contact
(Not Only Controls Nervousness, Eliminates "Non-Words")
Make Contact With *Every Individual* In The Group
Hold Contact From 2 to 5 Seconds
Start At Back—Establish Volume
Skip Around—Remember The Corners

Question and Answer Sessions

- Start By Asking An Easy "Reaction" Question of the Audience - Gets Them Talking
- Ask For Questions
- Maintain Eye Contact While Listening
- Be Sure You Understand the Question Before Answering
- Break Eye Contact and Paraphrase Questions
Gives You "Thinking Time"
Provides You and Your Audience With Clarification
Involves Group, Maintains Interest
- Answer to the Group – Not Just One Person
- Don't End Eye Contact on Questioner
- When Answering: Keep Objectives in Mind, Emphasize Benefits, Sell the message

Keys to Success

- Make sure your entire presentation relates to your objective - build toward it
- Manage your time effectively

LOANED EMPLOYEE PRESENTATION TEMPLATE 2022

This is meant to be a starting point and template for your presentation at a workplace campaign. It does not need to be used verbatim, though it can be. Feel free to edit the text and make it your own voice, get comfortable with the message, practice, and get ready to shine!

Campaign Theme:
United We All Win

Campaign Goal:
\$1,490,990

Sample Presentation:

Hello and welcome everyone! Thank you so much for attending today's workplace campaign kickoff for (enter company name here). I am (your name) an employee of (your employer) and I am here today as your Monadnock United Way Loaned Employee. I have been working with (ECC name) to help create this year's workplace campaign and now I'd like to tell you a little bit about why the work of MUW is so important and what you can do to help.

United We All Win. By raising funds to allocate to their partner agencies, MUW ensures that children are prepared for success, households are financially stable, and people have enough to eat.

Too many people in our region are silently suffering. We may not see or experience the extent of their pain and stress, but it exists. Hardship hides behind closed doors. It lives in neighborhoods we know well and those we never walk through. It dwells in every corner of our community, near and far.

Consider this. Prior to Covid-19:

- We had the third highest rate of child abuse and neglect in the state
- Our children scored lower than the rest of the state in English and math
- One quarter of our residents were low-income

These statistics are likely to get worse in the months to come.

When our neighbors cannot work, earn enough money, afford to buy enough food, or keep a roof over their heads, hardships grow and multiply. This creates toxic stress that affects entire families and communities. And a downward cycle continues.

But it doesn't have to be that way.

Our region has proven time and again that when we are United We All Win.

United Together, we can:

- Ensure people have good food and safe homes to live in
- Prepare children and families for success
- Create financially stable homes

With your support, we can eliminate fear and uncertainty. We can lift up our region. We can make it vibrant in the face of hardship.

Your neighbors need your more than ever to receive critical services that keep people and families whole.

Give Today

REASONS TO GIVE TO THE MONADNOCK UNITED WAY

Giving to the Monadnock United Way is the most powerful way to give to your community.

We are local

- By partnering with local health and human service agencies, a network of care is available to strengthen families; help children succeed; promote wellness, education, and financial stability; promote self-sufficiency; and provide a safety net for people in crisis
- 100% of donations stay in the Monadnock Region
- Services are available for you, your family, and your neighbors to use when you need them

We are cost-efficient

- With over 100 volunteers, operating costs are responsibly maintained at a minimum

We are community-based

- We connect people, knowledge and resources to provide solutions to the most pressing needs in the Monadnock Region
- A cross-section of local volunteers plays a critical role in the annual Investment Process to ensure that your money is going to cost-efficient, well-managed agencies providing the most needed services and working towards the most needed outcomes
- By funding local programs and agencies, we simplify the community effort for you and your organization

MAKE A STRONG IMPRESSION IN Q & A

A speaker's final impression is determined by the skill and knowledge exhibited during the question-and-answer session that follows most presentations. With preparation and practice, the following six-step process will ensure your positive first and final impression.

LISTEN—Concentrate on what the questioner is asking without jumping to conclusions. Read the tone of voice as well as the body language of the questioner.

CLARIFY—If, as a respondent, you aren't 100 percent sure of what is being asked, go back to the questioner and get him or her to repeat or rephrase the question until clarification is ensured.

REPHRASE—Whether informally with a quick reference to the question as part of the answer, or formally when the question is long and involved, you should repeat the question in some form. The only exception is when a repeat would emphasize a negative issue. A rephrase of the question verifies that you understand the question and ensures that the question is heard and clarified for the rest of the audience.

PAUSE—A two or three-second pause before answering any question allows you to "put your brain in gear before you put your mouth in motion." The pause also allows the entire audience to absorb the question before you jump into the answer. You need the pause on difficult questions, and by taking time to think before jumping into any answer, you avoid the non-verbal giveaway of those questions that are tough.

HEADLINE—Give an answer that gives the bottom line first. If examples and illustrations are needed, they should follow the headline answer. Ethical and talented respondents never evade answering even more difficult questions but will learn the technique of quickly bridging to more positive aspects of their topic after giving a concise, honest answer to the question that was asked.

HUSH—Learn to quit while you're ahead. Aim at keeping your answers between 30 to 60 seconds.

IF YOU DON'T KNOW—Say so! When faced with a question to which you do not have the answer, tell them that you are not sure but that you will get an answer. Then contact MUW staff, find your answer, and follow up.

Appendix

LIVE UNITED



Monadnock United Way

LE PLANNING CHECKLIST

Company Name: _____

Physical Address:

Employee Campaign Coordinator (ECC):

Name

Title

Phone

Fax

Email

Best Method of Communication: Phone Email

Is there a campaign committee: Yes ____ No ____

If yes, complete team info below:

Name	Phone	Email
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Name	Phone	Email
------	-------	-------

Name	Phone	Email
------	-------	-------

Is there a "high level" Contact Person (CEO/VP/Sr. Exec/HR)? Yes ____ No ____

Name/Title	Phone	Email
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Initial Contact with ECC:

Date: Time

Meeting with ECC and/or Campaign Committee Yes ____ No ____

Date Time

___ Bring packet of materials (if applicable) and extra supplies (brochures, posters)

___ Ask if ECC or assistant has prior experience in running an in-house campaign?

___ When do you want to begin planning? _____

___ Do you have any thoughts or ideas?

___ Do they want a speaker? Yes ___ No ___

Specific Agency?

___ Do they want to show the video? Yes ___ No ___

Video Equipment ON SITE?
(WiFi, laptop & projector or TV/DVD)

Yes ___ No ___

Notes:

CLOSING – “Thanks for volunteering and for meeting with me. Please call if you need help with anything...”

___ Follow up with ECC 1 week after their company kickoff (date): _____

___ Pick up Pledges and Reports from ECC and deliver to MUW

___ Send THANK YOU to ECC (date completed)

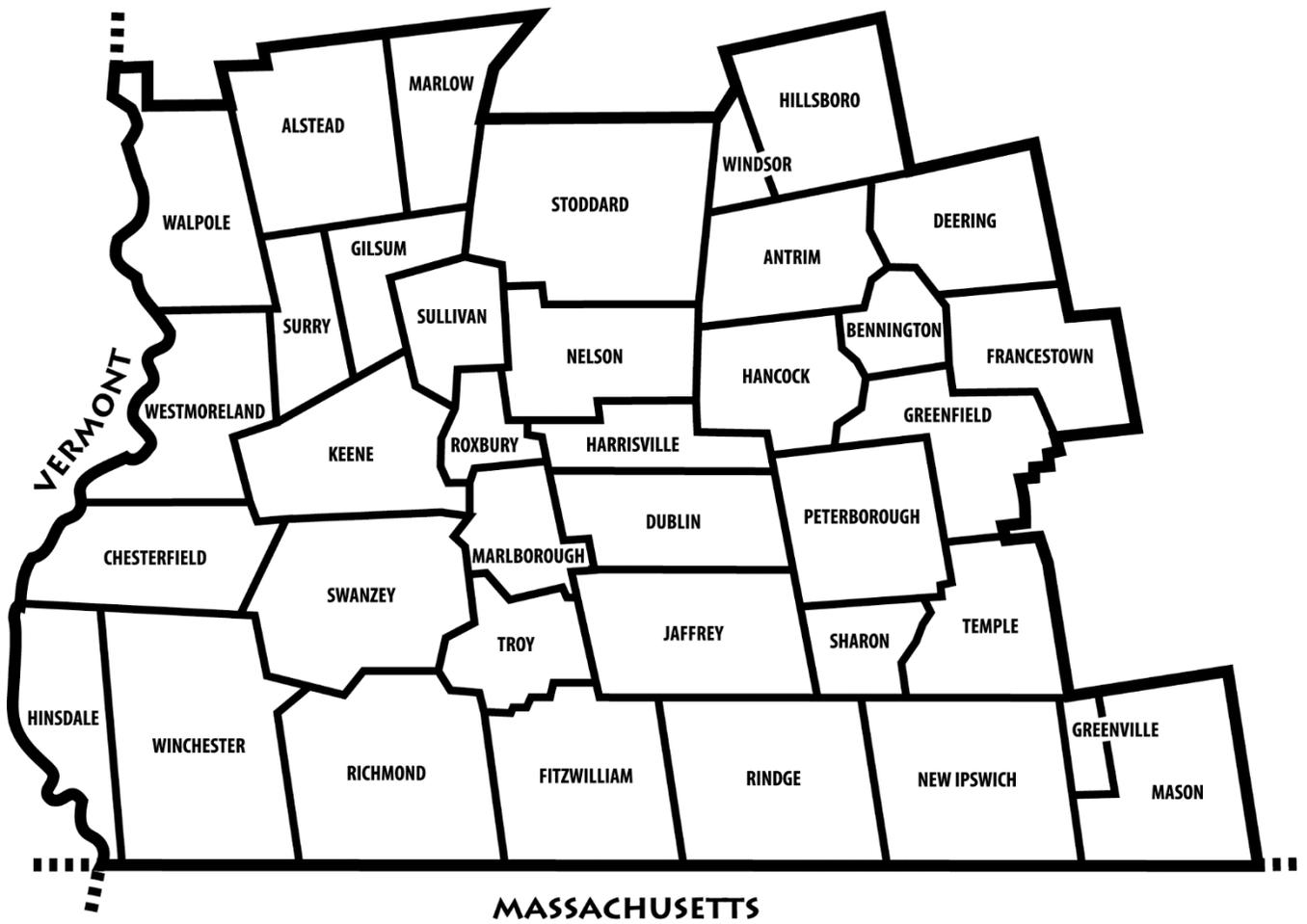
TO DO's

COMMUNICATIONS
Date/Time

Contact Person

Regarding

MONADNOCK UNITED WAY SERVICE AREA



HOW TO HANDLE COMMON OBJECTIONS

TOO MUCH OF THE MONEY RAISED BY MONADNOCK UNITED WAY IS USED FOR ADMINISTRATION AND ADVERTISING EXPENSES

The United Way Campaign is recognized as a proven method of cost-efficient fund raising. Monadnock United Way's goal is to maximize the amount of dollars going to community needs.

Monadnock United Way uses volunteers in all aspects of its work. For example, my employer has donated my time for several months to help in the campaign effort. Other volunteers provide their skills and expertise in fund distribution and all other aspects of Monadnock United Way. The extensive use of volunteers allows Monadnock United Way to maintain a small staff with low overhead.

MONADNOCK UNITED WAY IS JUST ANOTHER CHARITY

Monadnock United Way is more than another charity. It fights for children, education and financial stability in every community in our region. Their fundraising efforts spread local funds across all of their partner agencies, not just one agency.

WE HAVE A COMPANY POLICY AGAINST SOLICITING OUR EMPLOYEES

We understand your reluctance to have your employees continually solicited by a succession of worthy organizations. The Monadnock United Way was established to address this concern. Monadnock United Way runs one annual campaign that funds so many important area agencies that rely on our support.

MONADNOCK UNITED WAY ONLY HELPS THE POOR

Monadnock United Way services are directed toward many throughout all sectors of our community for the benefit of everyone. Examples of broad-based services include youth programs, family counseling, day care, health education, diagnostic programs, and drug and alcohol treatment programs. None of us knows when a tragedy will strike and when we will need help. Furthermore, each of you benefits from living and working in a healthier, happier community.

MONADNOCK UNITED WAY DUPLICATES SERVICES PROVIDED BY FEDERAL PROGRAMS

Each year 22 volunteers spend approximately 100 hours each evaluating the requests received by Monadnock United Way to fund local agencies and programs. This dedicated group works diligently to ensure the needs are truly there and that no services are duplicated.

THERE IS A MONADNOCK UNITED WAY AGENCY I DON'T LIKE. I WILL HAVE NOTHING TO DO WITH MONADNOCK UNITED WAY BECAUSE OF THIS

We respect your right to have this opinion. Remember, though, that a wide variety of services are performed by Monadnock United Way agencies throughout your community. Children, seniors, families, and others in need are all helped by your contribution. Not giving makes it more difficult to provide needed help across all sectors. You are also able to select where your donation goes through the MUW designation policy.

I WANT TO DECIDE WHERE MY MONEY SHOULD GO

You can! Monadnock United Way's designation policy allows you to direct all or part of your contribution to a focus areas or agencies which you feel need immediate resources.

I DON'T LIVE IN THIS COMMUNITY

Monadnock United Way's Donor Choice Program makes it possible for you to direct your contribution to the United Way serving your home community. You can take advantage of payroll deduction at the office while ensuring that your contribution supports services in your community.

MONADNOCK UNITED WAY IS NOT MEETING THE MOST IMPORTANT COMMUNITY NEEDS

Teams of volunteers review funded agencies to ensure that services are provided to people throughout the community. Not every problem can be solved, but the volunteers work to find the most effective, efficient ways of making the strongest impact. Sometimes this includes supplementary programs such as Gifts-In-Kind, management assistance, and staff training.

I CANNOT AFFORD TO RAISE MY GIFT TO MONADNOCK UNITED WAY; THERE ISN'T ENOUGH MONEY

We are all fighting the problems of the cost of living, and it does not get easier. You don't have to raise your gift, but please continue to give.

I DON'T NEED TO MEET WITH YOU. JUST SEND THE MATERIALS. This extra responsibility of being the Employee Campaign Coordinator was dumped on me.

I can understand that you feel the Monadnock United Way campaign is an imposition on your time; I know I can help relieve a good part of the campaign routine. We also have materials and a campaign film that can be used to easily enhance your campaign. I want to assist you in planning and implementing the campaign. Remember, I am here to help! Let's meet to discuss this opportunity.

DONOR CHOICE POLICY

Working together, the Investment Team identifies the most urgent current needs of the community and recommends allocations accordingly. In doing so, they make every effort to be accountable to you, while being responsive to the needs of local agencies and the people they serve.

However, if you wish to consider Donor Choice, you do have these options:

- **A Specific Monadnock United Way agency or program** – If you wish to designate your contribution to a specific Monadnock United Way agency or program, your donation is counted as the first dollars toward the agency’s predetermined allocation. Your designated contribution actually increases an agency’s funding only when total Donor Choice designations exceed the recommended allocation.

For example: If an agency’s allocation is \$10,000 and they receive \$2,000 in positive designations, their allocated amount will not increase. Using the same example, if the positive designations total \$11,000, then the agency receives \$1,000 above their allocated amount.

- **Other United Ways** – If you wish to designate your contribution to another service area, you may direct all or part of your contribution to a specific United Way.
- **Other Social Service agencies** – If you wish, you may also choose to designate part or all of your contribution to any 501 (c) (3) social service agency. The agency must be located in the Monadnock Region or, if out of the region, be funded by a United Way allocation process or be approved by the National Charities Information Bureau.
- **Omitting a Specific Monadnock United Way agency** – If you wish, you may request that a specific Monadnock United Way agency does not receive any of your contribution. If you choose this option, you continue to support the local network of social service agencies, but the omitted agency does not receive any of your contribution. Instead, the percent of your contribution that would have gone to that agency is deducted from their funding.

For example: If an agency’s allocation is 2% of the total dollars allocated to all of the agencies, and you choose to negatively designate this agency, 2% of your total gift will be withheld from their allocation. If that amount is less than \$1.00, it will be rounded up to \$1.00.

Designations to Monadnock United Way agencies are reported both to the agency and to the Allocations Committee for their consideration in determining future funding amounts.

THANK YOU LETTER/EMAIL TEMPLATE

Print this on your company letterhead, if allowable

Date

Employee Campaign Coordinator Name

Company

Address

City, State, Zip

Dear _____,

It was a pleasure working with you on this year's Monadnock United Way campaign. Your efforts make it possible for the MUW to help our community partners fight for children, education, and financial stability throughout our region.

Thanks to your efforts, people of all ages and from 36 Monadnock area towns will receive help when they need it. This assistance may come as emergency housing and access to food, early childhood educational supports, or parent education classes.

Once again, the employees of (*company name here*) have been very generous in their giving. Please share with them my thanks and appreciation for a job well done!

Thank you again.

Sincerely,

Your name

Loaned Employee

Your company name