



## Best Practices to Run a Successful Campaign

The following guide contains proven workplace best practices gathered from successful campaigns across KFL&A.

Remember:

- The #1 reason that people do not donate is because they have never been asked
- 82% of all United Way funds are derived from workplace campaigns

### Steps to a simple, quick campaign:

#### PLAN:

- Check your package to make sure that you have everything that you need.
  - Pledge forms can be personalized.
  - Brochures.
  - United Way information: list of agency speakers, posters, impact statements, etc. (complete Campaign Checklist is included in this guide).
  - Request an agency speaker through the United Way or show the United Way DVD (workplaces that invited an agency speaker increased their campaigns by 17%!)
- Schedule time to meet.
  - Coffee break, luncheon, or other gathering.
  - Use existing meetings, shift changes, safety and/or staff meetings, etc.

#### AWARENESS:

- Promote the kick-off in advance to all staff.
  - Promote the reason why staff would want to give to United Way and what United Way does in the local community.
  - Use staff message boards, net portals, or broadcast email.
  - Promote the upcoming campaign using posters and impact statements one week prior to the campaign/event.
  - **Make sure that all employees** are included in your campaign (shifts, leave, vacation, parental/maternity leave).

#### ACT:

- Have your kick-off **BEFORE** any planned events for maximum return – canvass first, events later.
  - Everyone should be provided the opportunity to give through the workplace campaign.
  - Hand out the pledge forms immediately after kick-off and ask for them to be returned the next day (short sharp campaigns have proven to work best).
  - Incentive draws for all staff encourage quick return of the forms. Don't forget to follow up with those who haven't returned their forms.
  - Once pledge forms are collected, put them in the enclosed envelope and call United Way to pick them up.

\*The campaign wraps up mid-November so plan ahead.

#### THANK:

- Thank all staff for the opportunity to invite them to give! Don't forget those who didn't give, they may want to give in the future.

## Resources/Tools to help you succeed

**United Way staff partner:** is a professional, highly skilled individual who will provide you with all the support you need.

**Loaned Representative:** is an individual loaned to the United Way by an organization for the three month duration of the campaign. This person is an extension of the United Way staff and will work closely with you and your staff partner.

**Training/Orientation sessions:** United Way staff and loaned representatives bring with them their skills and expertise to help you and your campaign exceed goals. They will share proven strategies and offer tips, best practices and easy to use ideas to help you succeed.

**Agency speakers:** Volunteers, clients and staff of agencies who will share personal stories to help your employees appreciate how important their support is.

**Seeing is Believing Tours:** Board the bus with us to see the impact the United Way serving KFL&A has in our community. The tour provides volunteers with an opportunity to see their donations at work in the community. Participants of tours saw an average increase of 35% in the campaigns at their workplaces compared to 6% in other workplaces!

**Presentations:** Leaders in the community will come out and assist you with presentations to key groups during management meetings, staff meetings, etc. This is especially helpful when you are promoting the value of leadership gifts, which helps all campaigns grow.

**Presentation materials:** Videos, CD's, powerpoint presentations are available upon request. Banners, signage are available on loan from the United Way office.

**Print materials:** pledge forms, brochures, directory of funded programs, posters, newsletters are available, free of charge, to help you promote the value of the United Way.

**Training guides:** ECC and canvasser guides offer you ideas and best practices, including tips and strategies that will help you grow your campaign. These guides are also available on the United Way website at [www.unitedwaykfla.ca](http://www.unitedwaykfla.ca).

**Event promotion:** United Way will assist you in promoting your events through our weekly newsletter (reaching over 350 workplaces) and will connect you with contacts in the community.

**Recognition:** Canvasser certificates, pins, etc. are available through your staff partner/loaned representative on request.

**Frequently Asked Questions:** United Way staff and loaned representatives are a great source of information about the United Way, health and social services in KFL&A and fundraising.

# Campaign Checklist

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

## Planning:

- A meeting with a United Way staff partner/loaned representative has been scheduled to review previous results and identify areas of opportunity, strengths and challenges.
- Analysis results have been used to determine which areas need to be focused on to attract new donors.
- Events are timed to protect the canvassing period.
- An awareness plan is in place including group information sessions, agency tours and/or agency speakers.
- There is a plan in place to thank all donors, volunteers and employees to ensure high participation in the following year.

## Recruitment:

- Committee members are representative of the structure, make-up and locations of the organization.
- A Canvasser Coordinator has been recruited to the committee to ensure that sufficient canvassers have been recruited, trained and mobilized and every employee is “asked” to participate.
- An Events Chair has been named who will oversee all campaign events including awareness opportunities and fundraising events.
- A Leadership (or Friendship) Chair has been appointed to canvass Leadership donors and senior management.

## Workplace Canvass & Support:

- Management and union leadership are engaged in the campaign and provide visible support including adequate time for volunteers.
- A participation goal has been set and the number of donors required to achieve this goal has been identified.
- The United Way staff partner/loaned representative has provided a customized training session for the committee and canvassers.
- Pledge cards have been personalized.
- Payroll deduction is being promoted as the easiest, most convenient way to give.
- The most effective canvassing techniques have been identified and a plan has been developed to approach all employees, including retirees, part-time workers, shift workers, field workers, new hires, etc.
- Strategies to increase participation include prizes/draws and incentives to return pledge forms, and awards given to workplaces that achieve certain levels of participation.

## Events

Events can be an important part of your campaign. But...**It's All About Timing!** An ideal campaign has one or two events to create enthusiasm and build momentum and awareness. These may include a kick-off, early bird draw, and a final draw. **They should not take away from the employee pledges and are best scheduled after the pledge forms have been distributed.** To help with your special events, United Way has supplies available for your workplace to help promote your event, e.g. posters, aprons, balloons, etc.

Here are some ideas that have been successful in the past:

- BBQ's, pizza days, bake sales
- Chili contests
- CD/Book exchanges
- Plant sales
- Rent-a-boss
- Jeans day / dress to a theme day (Hawaiian etc.) / dress differently
- Office Olympics
- Mini golf in the office
- Auction off preferred parking spots (by the month or the year)

# United Way serving KFL&A Workplace Volunteer Awards Criteria

**Participation Awards** based on employee contributions.

For workplaces with more than 6 employees

|                 |  |
|-----------------|--|
| <b>Platinum</b> | a minimum 90% participation and \$100 per capita |
| <b>Gold</b>     | a minimum 75% participation and \$75 per capita  |
| <b>Silver</b>   | a minimum 65% participation and \$65 per capita  |
| <b>Bronze</b>   | a minimum 50% participation and \$50 per capita  |

For workplaces with 3 to 5 employees

|               |  |
|---------------|--|
| <b>Spirit</b> | a minimum 100% participation and \$50 per capita |
|---------------|--|

**Leadership Awards** based on gifts of \$1,000 or more.

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|-----------------|---|
| <b>Ruby</b>     | workplaces with more than 40 Leaders of the Way |
| <b>Emerald</b>  | workplaces with 25 to 39 Leaders of the Way     |
| <b>Diamond</b>  | workplaces with 10 to 24 Leaders of the Way     |
| <b>Sapphire</b> | workplaces with 5 to 9 Leaders of the Way       |

**Special Awards**

**Keystone Awards** are given to employee workplace campaigns that raise \$250,000 or more through corporate, employee and event donations.

**Limestone Awards** are given to employee workplace campaigns that raise \$100,000 to \$249,999 through corporate, employee and event donations.

**Sandstone Awards** are given to employee workplace campaigns that raise \$50,000 to \$99,999 through corporate, employee and event donations.

**Cornerstone Awards** are given to workplace campaigns that raise \$25,000 to \$49,999 through corporate, employee and event donations.

**Most Improved Awards** are given to employee campaigns with the greatest percent increase in each sector.

**Freshman Awards** are presented to workplaces that have run an employee campaign for the first time.

**Team Spirit Awards** are selected based on committees that demonstrate team effort in the application of best practices.

**Labour Awards** are given to union locals that increase their support and their participation in workplace campaigns.

**Spirit of Community Awards** are given to organizations that reached out to the broader community, raising significant funds for the campaign.