

Employee Campaign Chair: Steps to Success Mini-Guide



Welcome and congratulations on your role as a United Way KFL&A Employee Campaign Chair! An Employee Campaign Chair (ECC) is a volunteer in a workplace carefully selected to lead the United Way workplace campaign. This individual works closely with United Way staff and volunteers and is responsible for working with a team to lead, manage and monitor the workplace campaign.



This year, the global pandemic resulted in the shutdown of workplaces and businesses across the country. There has been a dramatic economic impact, and it is projected there will be a long phased-in recovery. This guide is customized to incorporate a virtual campaign model, ensuring strategies that will engage your colleagues and support the community during these challenging times.

Steps to a Successful United Way Workplace Campaign

Step 1: Planning and Teambuilding

- Learn about United Way through your staff partner and complementary documents like the **Communications Framework** (unitedwaykfla.ca/communication-framework) and **Annual Report** (unitedwaykfla.ca/2019-annual-report). Follow United Way KFL&A on social media platforms to stay up-to-date on local impact
- Build a workplace campaign **team that reflects peer-to-peer conversations**
- **Train your team** with the help of your staff partner, by attending a Peer Learning Session, champion training, and by including education and awareness opportunities like a virtual agency speaker
- **Develop a plan and timelines** for a virtual campaign in 2020. Review Leadership gift (\$1,200+) strategies with your staff partner as this has been proven to have the maximum return on effort

Step 2: Preparation and Awareness

- Plan for **broad outreach on multiple platforms**, focusing on digital options (intranet, email, digital signs)
- Keep your **campaign timeline short** (ideally 1 – 2 weeks)
- Present a **clear, focused message** on the impact your colleagues engagement can make in the community

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Step 3: Employee Giving

- Kick off your workplace campaign with a **virtual agency speaker or tour**, including interactive opportunities and a call to action
- Include the **United Way virtual kickoff event on September 11, 2020** as an opportunity for team building
- Ensure your volunteer **Champions are trained to help employees to make a donation** through your giving platform to make it as easy as possible for people

The Ask

Now, more than ever, pledging and canvassing will need to be the focus of workplace campaigns to mitigate potential loss of revenue from special events.

#1 reason people don't give is because they weren't asked

Recruit and train volunteer Champions to ensure every colleague, starting with Leaders & Friends (\$500 + donors), are contacted to create excitement and interest in supporting their United Way.

- Make giving easy. United Way has many virtual giving options including e-pledge, editable PDF forms, or consider roll-over gifts from last-year with donor permission
- Ensure **all Leaders of the Way (\$1,200+ annually) and Friends (\$500+ annually) have been canvassed** by a Leadership Champion or peer ask
- Leverage the Leadership Challenge Grant matching program to incentivize donors
- Work with your staff partner to provide updates on progress and **manage and monitor your campaign results** to recognize your colleagues and follow-up as needed
- Wrap-up and recognition plans

Step 4: Virtual or Physically Distanced Events

- Events can support awareness raising, visibility, and teambuilding
- **Time fundraising events after canvassing** has been completed
- Plan on raising funds through employee giving, and not from events
- Follow guidelines for **events requiring gaming licensing**, solicitation of prizes, and receipting – your staff partner can advise

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Examples of virtual workplace events:

- Online auctions
- Raffles (ensure you have appropriate licensing)
- Social media challenges (awareness-raising, fun and engaging)
- Physically distanced walk / runs / scavenger hunts
- Virtual escape rooms
- Drive-in movies in your parking lot

Campaign Timelines



Leadership Challenge Grant

Once again this year, Jessica Bayne-Hogan will generously provide a Leadership Challenge Grant to encourage Leadership level gifts. In 2019, this helped increase giving by Leaders of the Way by 21%.

How the Challenge Grant works:

For new Leaders of the Way

- Your first-time donation of \$1,200 or more to the United Way will be matched up to a collective maximum amount
- Increase your gift to \$1,200 this year and the Leadership Challenge Grant will match your \$1,200 donation

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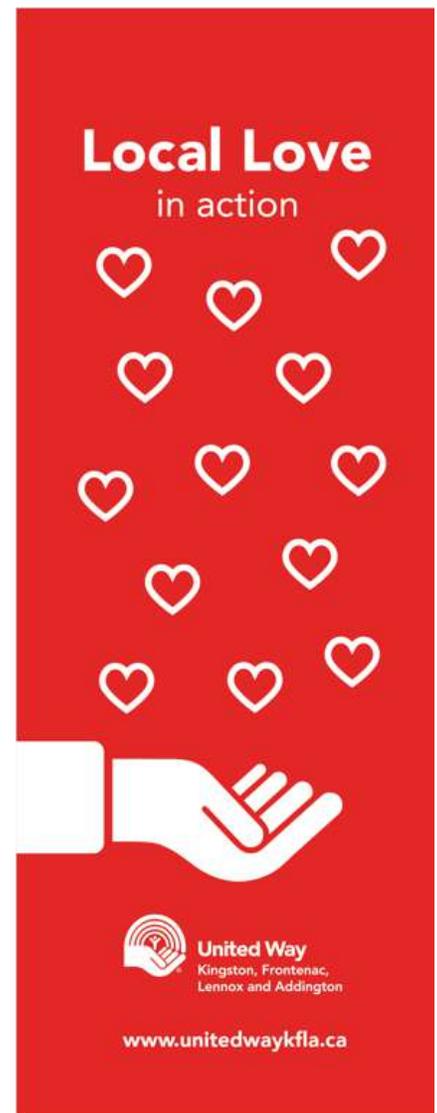


Renewing Leadership Donors

If you are already a Leader of the Way and, this year, you add at least 10% to your gift, the Leadership Challenge Grant will provide a match up to a maximum amount. For more information about the grant and Leadership giving, contact us at leadership@unitedwaykfla.ca.

Campaign Checklist:

- ✓ Visit the website www.unitedwaykfla.ca to review the Annual Report, Communications Framework and other pages to learn about United Way impact in the community, particularly in response to COVID-19
- ✓ Meet with your United Way staff partner
- ✓ Sign up for a Peer Learning Session and organize Champion training
- ✓ Make sure you recruit a committee to help
 - **Champion Lead** to support 100% canvassing of your colleagues
 - **Events Chair** to support virtual event engagement
 - **Leaders and Friends Chair** to canvass Leaders of the Way and Friend donors
 - **Communications, Marketing** expertise
 - **Next Gen Workplace Ambassador** appointed to help promote your efforts via social media and engage their peers
 - A workplace **Retiree Champion** can support the continued engagement of your colleagues who have retired
 - **Labour** representation, if applicable
- ✓ Recruit a sufficient number of Champions to support 100% canvassing (1:10 ratio)
- ✓ Set up ePledge and messaging with your United Way staff partner with pre-campaign messaging set up to go to Friends and Leaders
- ✓ Incentives are offered to encourage early pledging



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