

Employee Campaign Chair Mini-Guide

10 Steps to a Successful Workplace Campaign

Remember, the #1 reason that people do not donate is because they have never been asked!

Step 1: Learn About United Way

- Meet your United Way staff partner
- Attend a Peer Learning Session
- Review United Way videos and materials on our website, unitedwaykfla.ca
- Go on a Seeing Is Believing (SIB) Tour
- Invite your staff partner to a committee meeting to talk about United Way
- Follow us on social media @unitedwaykfla (be sure to like and share our posts!)
- Participate in community events and meet other volunteers

Step 2: Build a Team

- Recruit early
- Define roles, structure, expectations
- Peer-to-peer is important
- Include representatives from all departments and locations, union (if applicable), management, Next Gen, retirees

Step 3: Train Your Team

- Host a training/orientation session for your committee
- Schedule a training session for your unit reps/department leads
- Schedule training sessions for canvassers/champions
- Include a custom Seeing Is Believing tour at the start or close of your training

Step 4: Set Goal & Develop Plan

- Review past campaigns with your staff partner
- Identify what works and build on these strategies
- Work with your committee to establish financial and other goals e.g. 100% canvass, # of donors, increased average gift
- Establish your campaign dates
- Share with the committee the steps required to achieve goals
- Circulate timetable to management (and union if applicable) and invite them to key events

Step 5: Preparation & Awareness

- Review opportunities for engagement and awareness
- Request agency speakers through your staff partner
- Review materials catalogue
- Make request for materials from your staff partner
- Promote your campaign throughout your workplace using posters, intranet, email, videos etc.

Step 6: Launch Your Campaign

- Include United Way Kick-off Breakfast as an opportunity for team building, motivating and thanking your own team
- Kick off your campaign with an event or a simple reminder and pledge blitz
- Use events to increase awareness
- Use videos, posters, banners, impact statements and agency speakers
- Involve management (and union leadership if applicable)

Step 7: Canvass

100% canvassing is the most important step to success.

- Determine your canvass approach - face to face, peer to peer, personal follow up calls or visits
- Choose the most appropriate canvasser/ champion with the information and training to provide answers
- Ensure all Friends and Leaders have been asked by a Leadership Champion or peer ask

Step 8: Manage & Monitor

- Monitor and report on progress to United Way and senior leadership
- Securely handle funds and pledge forms
- Provide updates to staff on the campaign results so they can see the progress
- Consider thanking staff as you receive their contribution to the campaign (could be by e-mail)
- Follow up with canvassers/champions

Step 9: Events

- Review events in our events guide
- Use events for connection, engagement, awareness, and team building
- Remit funds to United Way, clearly indicating these are events
- Time fundraising events after canvassing
- Have fun!

Step 10: Wrap Up, Recognition

- Thank everyone (committee members, canvassers, senior management, Labour, volunteers)
- United Way cards, certificates are available
- Publicly acknowledge those who have gone above and beyond
- Work with United Way to ensure all donors get thanked. All Friends & Leaders get a thank you letter from United Way
- Communicate results to the workplace
- Make sure all donations, and pledge forms are submitted to United Way
- Build succession plan – identify ECC or committee members for next year's campaign
- Evaluate results against goals, document in plan for following year
- Conduct a debrief with your campaign team to determine what worked and what didn't



Giving Options

Make giving easy. Look at all the different options of giving and see how you can adapt or offer these to employees in your workplace.

- Many workplaces find it effective to offer auto-renewal
- Redirect donors who use paper to the United Way website through phone calls either by your champions or UW
- Editable PDF pledge forms

Employee payroll deduction plans through workplaces are the easiest way to give to the United Way. Other options for giving include:

- Monthly donations from credit cards or chequing accounts, processed on the 15th of each month beginning in January
- One-time donations by cash, cheque or credit card
- United Way has new options like e-transfer and paypal
- If your online campaign doesn't offer these, look into how employees can use the online option on UWKFLA's website (talk to your staff partner)
- Gift of Securities: donors can benefit from the tax advantages of donating securities



Leaders of the Way

Leadership and Major Individual Giving

Leadership Giving is the fastest growing segment of the United Way campaign. Leadership Giving starts at \$1,200 a year, or \$100 a month or more.

Focusing on Leadership Giving is the most effective strategy to grow your campaign.

Please contact the United Way at leadership@unitedwaykfla.ca for more information. You can also request the Leadership Giving Guide from your staff partner.

Leadership Giving Levels

Transformational	\$100,000+
Philanthropist Circle	\$25,000 - \$99,999
Platinum	\$10,000 - \$24,999
Gold	\$5,000 - \$9,999
Silver	\$2,500 - \$4,999
Bronze	\$1,200 - \$2,499

Resources/Tools to Help You Succeed

- **Peer Learning /Orientation sessions:** volunteers from other workplaces share their tips and tools at this session.
- **Agency speakers:** volunteers, clients and staff of agencies will share personal stories to help your employees appreciate how important their support is.
- **Seeing is Believing Tours:** board the bus to see the impact the United Way of KFL&A has in our community. The tour provides volunteers with an opportunity to see their donations at work in the community. Ask about a custom tour for your workplace.
- **NEW! Impact Calculator and Charitable Tax Calculator:** Your colleagues can see the impact of their donation with just one click or estimate their charitable tax credit.
- **Campaign Toolkit:** A full page of materials on our website including videos, posters, templates, guides and toolkits.
- **Community Impact Report:** This report lists all our member agencies and programs and provides key messages and information about the impact of the United Way. View online at www.unitedwaykfla.ca/communityimpactreport.
- **Presentations:** leaders in the community will make 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 and PowerPoint presentations are available upon request. Banners and signage are available on loan from the United Way office.
- **Promotional material:** United Way stickers, balloons, aprons, chef hats, flags and much more are available through your staff relationship manager/loaned representative to support your campaign and events.
- **Training guides:** ECC and canvasser guides offer you ideas and best practices, including tips and strategies that will help you grow your campaign.
- **Media liaison:** United Way will assist you in promoting your events through Blogs, social media, emails and can connect you with media contacts in the community.
- **Recognition:** canvasser certificates, pins, etc. are available through your staff partner/loaned representative on request.
- **Frequently Asked Questions:** FAQ's are available online at www.unitedwaykfla.ca/campaigntoolkit/.