



United Way
Central Alberta



Campaign Tool Kit

How to run a successful (& virtual) Workplace Campaign

- ✓ CAMPAIGN KICK-OFF
- ✓ HOW TO GET STARTED
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United Way Central Alberta

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Our Mission

To improve lives and build community through engagement and mobilized collective action.

Our Vision

A resilient and caring community where everyone thrives.

CAMPAIGN KICK-OFF

As you begin your United Way workplace campaign, a virtual kick-off has many benefits.

Ready, Set, Go! A virtual kick-off clearly marks the start of your United Way effort creating a sense of urgency and a timeline for colleagues. Campaigns with kick-off events have proven to raise more dollars in support of our community!

Inspiration The kick-off provides employees with an opportunity to hear about the impact of their donations and be inspired, so they can make an informed decision about giving.

Team Building This is a great chance to bring employees together in a common cause of caring and build morale, which is especially important in a time of social distancing.

Stage Setting It demonstrates the passion your organization, your senior management team and your colleagues have for the campaign and supporting our community.

Your United Way staff partner is here to support you with tools and resources to help you plan and customize your kick-off event.

SAMPLE CAMPAIGN TIMELINE

Pre-Launch				
WEEK 1				
MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY
Leadership Kick-Off	Kick-Off			Mid-Campaign Review
Leadership Canvass				Remit Funds
	Early Bird #1	Early Bird #2	Early Bird #3	Early Bird #4
Canvassing				
Communications				
WEEK 2				
MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY
Canvassing				
Remit Funds	Event	Remit Funds	Event	Wrap-Up Event
Communications				Recognition
				Remit Funds



HOW TO GET STARTED

Key Considerations and Planning

Helpful Hint: Reference the Virtual Kick-Off Planning Schedule for a 5-week timeline that can help you get things rolling.

Technology Platform

Confirm the online web conferencing platform that is approved by your workplace so that your United Way staff partner can help you build your kick-off agenda and activities on the platform. If you cannot host your kick-off on your own technology platform, speak to your United Way staff partner.

Senior Management Support

Support from your Executives is critical to showing your organization is behind the campaign. Book their time so they can participate in your virtual kick-off, or see if there may be existing meetings you can piggyback on. See Appendix B for suggested talking points and presentation content that your senior management team can personalize.

Consider your Audience

For best results, we recommend a kick-off event is scheduled for no longer than 30 minutes. If your employee base is large, you may consider hosting a series of kick offs (e.g. by department) throughout the day, or across a few days. While there is no ideal, you want to strike a balance between being able to reach all your employees, and helping people be comfortable enough to ask questions and interact.

Determine the Meeting Host and Other Company Speakers

It is best if the Employee Campaign Chair (ECC) acts as facilitator to ensure your kick-off sticks to the agenda. If the ECC needs support, your United Way staff partner can act as co-host. Invite your CEO or other executive(s) to take part and speak, too, as their leadership can inspire others and demonstrate support of United Way from the top down.

Make it Interactive

Engage your colleagues during the kick-off. Consider interactive activities like online polls or quizzes to keep their attention online. Your United Way staff partner can help you build this activity.

Need a UW Speaker for your event?
Please contact your UW staff partner and submit your booking request at least 10 business days prior to your event.

Raise Awareness about Impact

United Way has speakers that can join your virtual meeting and online awareness activities like our online poverty simulation [Makethemonth.ca](#), or [The Brain Game](#), showcasing the powerful role of relationships on early brain development, online tours, and campaign videos can help share the impact of donations and inspire people to give. Your United Way staff partner can help you select the best awareness-building activities for your agenda.

Set Clear Action Steps

Let people know how they can donate and/or how they can get involved in the campaign. We recommend sending your donation link immediately following your kick-off event, so people can take action while they're feeling inspired.

***Helpful Tools! See following Appendixes A, B & C for Virtual Kick-Off resources.**



10 EASY STEPS

Here's 10 Easy Steps you can take along your way to a successful Workplace Campaign.

1.

Meet with your United Way staff partner to review past campaign results.

2.

Assemble a team to help you plan your campaign. Meet with them virtually to clarify expectations and responsibilities.

3.

As a team, set an attainable fundraising and participation goal.

4.

Meet to brainstorm what digital strategies you will use to reach your goal.

5.

Decide how you will build awareness about the ease and simplicity of e-pledge donations.

6.

Build excitement by sharing videos and stories digitally. Communicate timelines and campaign information with everyone in your workplace digitally.

7.

Hold your own or attend UW virtual events to share information on the issues facing Central Alberta, and how United Way's work is positively impacting our communities.

8.

Have Ambassadors ask for gifts by canvassing colleagues. For best results, encourage a 1:1, peer-to-peer strategy whenever possible.

9.

Thank volunteers, colleagues and leaders for their participation in helping reach your goals.

10.

Collect any additional special event funds or donations and remit to United Way Central Alberta.

CAMPAIGN TASKS

PLAN

- Learn about United Way and campaign best practices
- Utilise your United Way staff partner(s) and team member(s) to help customize your campaign
- Plan a short campaign to keep momentum and excitement high
- Recruit a team of Ambassadors to help with canvassing
- Identify and communicate key dates and timelines
- Ensure leadership and staff availability or leverage an existing meeting for a Kick-Off event
- Plan team challenges to encourage participation

EXECUTE

- Send online donation links immediately following your campaign kick off
- Inform employees about the issue facing our region and United Way's impact in the community
- Encourage early giving with incentives (early bird draw, admission to exclusive events)
- Set a deadline to make a gift and send follow up emails via e-pledge
- Run special events after employees have had the opportunity to make their e-pledge
- Meet virtually with colleagues to provide more info or clarification
- Run team challenges to encourage increased participation

WRAP UP

- Announce your achievement and share the impact made by your collective generosity
- Thank donors and volunteers
- Award prizes
- Remit special event funds and the Final Results Form to United Way Central Alberta

There's even more

ONLINE.

Be sure to visit ca.unitedway.ca for additional information and resources including: Inspiring stories, videos, activities calendar and information on the impact of your donation



GUIDE TO SUCCESSFUL CANVASSING

Role of the Ambassador

Ambassadors are key to the success of every campaign. You are the frontline volunteers who approach your peers in the workplace to raise awareness about United Way's vital role in the community.

Whether working remotely or in-person, Ambassadors will provide your colleagues with an opportunity to make an informed choice about charitable giving by doing these three simple things:

INFORM	ASK	THANK
Share the benefits United Way brings to our community. Explain how their contribution will make a difference.	Ask your colleagues: <ol style="list-style-type: none">1. If they would like to support the most vulnerable in our community by making a donation to United Way.2. If they have any questions they need answered before being able to make a decision about their charitable giving.3. Follow up by email with potential donors by answering questions and reaching out to those who were unavailable.	Thank your colleagues for their time and participation.

1 Prepare

Learn about United Way's work in our community

- Visit caunitedway.ca to find out how donations make a difference, learn about community issues and watch stories of people who received help from a United Way agency or initiative.
- Consider your own personal reasons for giving and make your gift first. You will find it easier to ask others for their contribution if you have already made your donation.

Develop a canvassing plan

- Review the list of people you are responsible for canvassing. Identify the people on your list who you know well. This will be a good place to start and will help you build confidence with your canvassing.
- Book a series of short, virtual meetings (about 15 minutes each) to meet one-on-one with everyone on your canvassing list.
- Consider including links to United Way videos or stories that your colleagues can review before your meeting

2 Canvass

- When canvassing virtually and video is available, keep your cameras on so you can speak face-to-face.
- Explain that the purpose of your meeting is to talk about United Way, your workplace campaign, and to ask for a donation.
 - "If you've given to United Way before, thank you! Let me take a few minutes to tell you about what your donation has made possible. For example, thanks to your support, when COVID-19 struck our region, over \$20,000 was invested in rapid response emergency funding in the first few months of the crisis, allowing agencies to respond to their community's most urgent needs, like food access, support for seniors and mental health counselling."
- Explain your own personal reasons for supporting (i.e., have you or someone you know used United Way services?) Talk about an issue or certain program or agency you feel strongly about. Provide information about United Way's work in our community. To access our full Resource Library visit <https://caunitedway.ca/virtual-campaign-toolkit/>
- Outline the key facts about your organization's campaign (i.e. past achievement, your campaign goal, average giving amount, participation, etc.).

GUIDE TO SUCCESSFUL CANVASSING

Promote the benefits of giving

- Promote early bird prizes or other incentives to encourage potential donors to decide sooner, rather than later.
- Talk about how their donation will leverage your organization's corporate match (if applicable).
- Explain the [Tax Benefits of Giving](#).

Ask your colleagues to support the community by donating directly to United Way

- Email each employee information about United Way, like stories and videos from our Resource Library.
- Ask every potential donor: "Will you make a donation to United Way? Your gift will help to sustain a vital social safety net of 35 programs, 26 agencies and 1 coalition providing services to those most in need, when and where they need it most."
- If someone is unavailable, be sure to book a meeting to follow-up.
- If you are unable to answer a question reach out to your United Way staff partner.

Invite your colleagues to participate

- Share the dates and times of all campaign activities and events and encourage your colleagues to support the campaign by attending.

Say Thank You

Thank people for their time as well as their participation. Remember that the impression you leave is the one people will remember when they think of United Way and your workplace campaign.

3 Follow Up

After your canvassing meeting, it's best to follow up by email:

- ✓ With answers to people's questions.
- ✓ With anyone who was away or unavailable.
- ✓ With people who have not made a decision.
- ✓ To thank everyone on your list.
- ✓ Report results and any feedback to your Employee Campaign Chair.

TIPS

The number one reason people don't give is because they were never asked.

Be yourself.
Your enthusiasm and commitment will motivate others to give.

Don't take things personally.
If someone says "no," try to determine why and address their objection.

Be fearless!
You are not asking for yourself— you are asking for the community.



VIRTUAL CAMPAIGN OFFERINGS

United Way Central Alberta is ready to support your virtual campaign all season long with a wide variety of online resources.

Drive-In Campaign Kick Off Luncheon

Save the date! Thursday, September 9 is United Way Central Alberta's Campaign Kick Off at Carnival Cinemas parking lot. Your ticket includes a boxed lunch catered by Bo's Bar & Grill, popcorn, live music and a chance to win one of the exciting door prizes. Visit caunitedway.ca for tickets!

E-pledge

An online pledge can only take a few minutes to complete. Easily accessible at work or from home, and reduces admin time for both company and United Way staff, as well as paper waste.

Engagement Activities to Keep Campaign Strong

United Way Central Alberta will have multiple engagement events and activities, both online and in-person (aligning with current safety protocols) to help boost engagement and keep Campaign top of mind throughout the fall season.

Refer to United Way Staff or caunitedway.ca for the most up to date details.

Virtual Raffles & 50/50 Draws

United Way Central Alberta has partnered with Rafflebox.ca to bring secure and AGLC compliant virtual raffles and 50/50s to any workplace. We can easily set up and administer your custom raffle, or enable access for workplaces to admin their own dashboards.

Virtual Conferences

United Way Staff, volunteers and ambassadors will be available for online meetings to discuss our work.

Resource Library

All posters, brochures, and collateral will be digital this year, and can be printed at request. Our [Resource Library](#) will include videos of our ambassador stories available for sharing.



CAMPAIGN BEST PRACTICES

Activity	Best Practice
Kick Off Event	<ul style="list-style-type: none">• Have a senior executive attend and speak at the event.• Invite United Way staff to speak about United Way's work in the community.• Show a United Way speaker video to demonstrate impact of donations.
Build Awareness of United Way	<ul style="list-style-type: none">• Share a United Way video—available on United Way's website.• Distribute information about United Way.• Share the Annual Report and other tools available on United Way's website.
Early Bird Draw	<ul style="list-style-type: none">• A popular prize is a “day off with pay”—check with your HR department.
Communications	<ul style="list-style-type: none">• Consolidate and coordinate outgoing communications to avoid overwhelming employees.• Promote your corporate match and other incentives to increase contributions.
Canvassing	<ul style="list-style-type: none">• Face-to-face encouragement (whether virtually or in-person) is best and can be done individually or in a group setting. If virtual, remember to keep your camera on—people give to people!
Events	<ul style="list-style-type: none">• Hold events after employees had a chance to give.• Popular events: dress-up days, online auctions, virtual trivia, virtual raffles & 50/50 draws (connect with your United Way staff partner for more ideas).
Recognition	<ul style="list-style-type: none">• Use channels that are effective in your workplace (i.e., email, presentations, intranet articles, etc.).• Customize your message for each audience.• Include campaign results and reiterate impact of gifts.• Post volunteer names online.

APPENDIX A

Recommended Virtual Kick-Off Agenda

We welcome you to make use of the following template agenda as you plan your event.

Virtual meeting login in details: [include details here]	
Opening – 5 mins Time: XXX am/pm CEO/ECC/Sr. Leaders	<ul style="list-style-type: none">• Welcome• Value of UW & Company partnership• Importance of United Way now• Encourage all to get involved with campaign activities• Interactive poll or quiz to get people engaged
United Way Awareness activity – 7-12 minutes Facilitated by United Way Central Alberta	Activity examples: <ul style="list-style-type: none">• Makethemonth.ca online poverty simulation• UW & Company quiz• Group whiteboard sharing (e.g. “Why I care about community.”, “Which #UNIGNORABLE issue resonates with me?”)• UW videos• Guest speaker from United Way
Closing remarks – 5 mins CEO/ECC/Sr. Management	CEO/ECC to thank participants, and reiterate importance of United Way <ul style="list-style-type: none">• Call to action/donate now• Share company fundraising/participation goals• How to give• Instructions on next steps – donation link to come, who to contact with questions, etc.



APPENDIX B

Key Points for Speakers

The below can be customized/personalized to meet the needs of the speaker(s) at your virtual kick-off event.

Opening remarks

- Welcome attendees, and thank them for joining the call. My Name is..... Before we begin, I would like to welcome two very important guests who are with us this morning (introduce UW and UW Speaker).
- As many of you know, I am a strong believer of United Way's work and I am proud to be a part of <COMPANY'S> United Way Central Alberta's 2021 Campaign.
- We all know that poverty is hurting our community and undercutting what we stand for. This is even more evident now during this very challenging time of Covid-19 - our most vulnerable community members are even more at risk.
- We have seen demand for community services sky rocket since the beginning of the crisis here at home. The need for access to food, mental health counselling, and employment supports has increased by nearly 45% due to this pandemic.
- And that need will continue to climb as we help people get back to work and settle into a new normal for our community.
- What inspires me is that as a nation, we have all pulled together and looked to how we can help during this pandemic. Everyone is stepping up and doing what they can to help to ensure no one falls through the cracks.
- But we have to look to the future, and what our role will be in our long-term community recovery. These issues we have seen in the last few months (food access, senior's isolation, job security) they are not new and will continue to need to be addressed long after we settle into our new normal.
- That is why we partner with United Way; they have been on the front line of address these issues. They provide a vital continuum of care for people and families who need support.
- I want to take a moment to recognize and thank each and every one of you in this room for stepping up to support United Way every year. Our collective commitment demonstrates <COMPANY'S> leadership in communities across Central Alberta, raising over X\$ for United Way. KEY POINT ABOUT LAST YEAR'S CAMPAIGN (your UW Staff Partner can help provide some information if needed)
- IF THE SPEAKER HAS A PERSONAL STORY ABOUT UNITED WAY OR SOMETHING THEY HAVE EXPERIENCED, ADD HERE
- Thank you again for your personal leadership and generous support of United Way.
- Introduce the next section of the event <e.g. audience poll, speaker, UW activity> and turn over to the activity facilitator

Closing Remarks

- Thank you, <GUEST SPEAKER>, for joining us today and speaking. United Way plays such an important role in our community, investing in a critical social safety net throughout the Central Alberta regions. This vision ensures we are lifting our region up and that regardless of background and circumstance – everyone can thrive.
- Our annual United Way campaign starts on <DATE>. We have an amazing team that has worked hard to make this year's campaign even better. Thank you, <CAMPAIGN VOLUNTEERS> for your leadership in the campaign.
- <By now, a donation link should be in your inbox. I encourage you to make a gift now. Let's demonstrate our commitment to our staff before we officially launch the campaign on the DATE.> **Optional if there is a multiple kick off situation and you send out link early**
- Our firm's donations to United Way Central Alberta are part of how we are building a stronger community and creating legacy across our communities.
- Thanks everyone.



Virtual Kick-Off Planning Schedule

