



**United Way**  
**Central Alberta**



# Campaign Tool Kit

## How to run a successful (& easy) Workplace Campaign

- **HOW TO KICK OFF YOUR WORKPLACE CAMPAIGN**
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### **United Way Central Alberta**

100, 4828 53 St. Red Deer, AB T4N 2E8  
[info@caunitedway.ca](mailto:info@caunitedway.ca) | 403-347-0513

### **Our Mission**

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

### **Our Vision**

A resilient and caring community where everyone thrives.

# HOW TO KICK-OFF YOUR WORKPLACE CAMPAIGN

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

**Ready, Set, Go!** A kick-off event 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 and helps build engagement.

**Stage Setting** It demonstrates the passion your organization, your leadership 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



# GETTING STARTED

## Key Considerations and Planning

**Helpful Hint:** Reference Sample Campaign Timelines for examples of a 1, 2 and 3 week campaign timeline.

### Technology

Will your event include virtual attendees? If so, confirm the online web conferencing platform that is approved by your workplace.

### Leadership Support

Support from your Leaders 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 leadership team can personalize.

### Consider your Audience

For best results, we recommend a kick-off event is scheduled for no longer than 30 minutes, especially if participants are attending virtually. 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.

### Host and 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.

**Would you like a UW Speaker or Client Ambassador for your event? Please contact your UW staff partner and submit your booking request at least 1 week 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](https://www.makethemonth.ca), or the in-person [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 for Sample resources.**



# 3 STEPS TO A SIMPLE CAMPAIGN

## PLAN

- Meet with your United Way (UW) staff partner to review past campaign results and/or learn about campaign best practices
- Utilize your UW staff partner(s) and team member(s) to help customize your campaign, and if applicable, set up your custom e-pledge page
- Assemble a team to help you plan your campaign. Meet to clarify responsibilities and set your fundraising and participation goals. Plan a short campaign to keep momentum and excitement high
- Plan team challenges and engaging activities to encourage participation
- Ensure leadership and staff availability or take advantage of an existing meeting for a kick-off event

## ACT

- Hold your own and/or attend a UW in-person and virtual events to learn about the issues facing Central Alberta, and how United Way's work is positively impacting our communities
- Send out your e-pledge link immediately following your kick-off event
- Share campaign information and events, impact videos and other resources with your workplace team members
- Encourage early giving with incentives like early bird draws or admission to exclusive events
- Set a deadline to make a gift and send follow up emails or reminders
- Run special events or team challenges after employees have had the opportunity to make their e-pledge

## WRAP UP

- Announce achievements and share the impact made by your collective generosity
- Thank volunteers, colleagues, and leaders for their participation in helping reach goals
- Award prizes or incentives
- Remit special event funds and the Final Results Form (if applicable) to United Way Central Alberta

There's more  
ONLINE.

Resources are just a click away at  
[caunitedway.ca](http://caunitedway.ca)

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



# CAMPAIGN ENGAGEMENT TOOLS

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

## United Way Central Alberta Campaign Kick Off Luncheon

Save the date! Thursday, September 8 is United Way Central Alberta's Campaign Kick Off! More details to be announced Summer 2022.

## 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. To set up your customized e-pledge link, speak with your UW staff partner.

## Engagement Activities to Keep Campaign Strong

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

Refer to your UW staff partner or [caunitedway.ca](http://caunitedway.ca) for the most up to date details.

## Online Raffles & 50/50 Draws

United Way Central Alberta has partnered with [Rafflebox.ca](http://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 50/50 draw.

## Seeing Impact

United Way staff, volunteers and client ambassadors are available online and in-person to discuss our work and impact in Central Alberta.

## Resource Library

All posters, brochures, and collateral are available to download 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

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### Kick Off Event

- Have leadership 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.

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### Build Awareness of United Way

- Share a United Way video—available in your toolkit.
- Distribute information about United Way.
- Share the Impact Report and other resources available in your toolkit.

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### Early Bird Draw

- A popular prize is a “day off with pay”—check with your HR department.

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### Communications

- Consolidate and coordinate outgoing communications to avoid overwhelming employees.
- Promote your corporate match and other incentives to increase contributions.

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### Campaigning

- 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!

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### Events

- 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).

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### Recognition

- 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 and/or recognize in person.



# FIRST COMMITTEE MEETING AGENDA CHECKLIST

## Looking back and planning forward

Here is a checklist of items you can use when planning your first committee meeting to help set you up for success for your upcoming campaign.

### Previous Campaign Details

- Campaign dates
- Overall theme
- What kind of campaign did you have - in-person, virtual, hybrid?
- Pledge forms - ePledge, online, paper?
- Kick-off event
- Wrap-up event
- Special events
- Speakers - general, leadership
- Attendance at events
- Volunteering
- Communications plan
- Number of committee members; was it enough? Too many?
- Amounts raised the previous year:
- Pledges; Special Events; Corporate gift or match
- Total funds raised?
- Funds that went to United Way?
- # of employees; participation rate (# of employees/# of donors)
- # of leadership donors (\$1200 and above)

### The Team

- Positions needed; GenNext lead, leadership donors lead, events lead?
- Was management and union representation on the company leadership team?
- Did the ECC lead the pledge collections/processing?
- Do you have enough campaign representatives for follow up (recommend one for every 10-20 employees)

### Events and Pledges

- What kind of kick-off would you like to have?
- What kind of special event or activities would you like to hold this year?
- Prizes for Early bird, leadership giving, end of campaign draws
- How were donors thanked?

### Setting your Campaign Goals

- Has your number of employees gone up or down?
- How many donors (leadership and otherwise) have moved on from your workplace?
- How is the company doing financially?
- What is the state of your industry?
- Setting participation rate; Multiply current # of staff x last year's participation rate = goal for # of doors.
- Setting fundraising goal: Multiply Last year's total funds raised x 10% and add together

# APPENDIX A

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





# APPENDIX B

## Speaking Notes

The below can be customized/personalized to meet the needs of the speaker(s) at your 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 2022 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 as we recover from the pandemic and our most vulnerable community members are still at risk.
- We have seen demand for community services skyrocket since the beginning of the pandemic. The need for access to food, mental health counselling, and employment supports has increased by nearly 45%.
- 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 how we have all pulled together and looked to how we can help during and post the pandemic. Everyone is stepping up and doing what they can to help to ensure no one falls through the cracks.
- But now 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.

# APPENDIX C

## Sample Campaign Timelines

### Plan your campaign calendar

United Way campaigns generally take place over 1-2 weeks but can be whatever length is best for your workplace. Always make sure you have a great campaign kick-off! Check out our sample timelines.

#### Sample Timeline: 1 week

Pre-campaign	Analysis and planning ECC and Committee training Launch emails for staff	Day 5	Mid-campaign review Report results to your United Way Staff Partner Reminder email to staff
Day 1	Kick-off event & United Way presentation	Day 6	Follow up with staff
Days 2-3	Committee reaches out to staff	Day 7	Wrap Up Event
Day 4	Early Bird Donor Draw Special event		

#### Sample Timeline: 2 weeks

Pre-campaign	Analysis and planning ECC and Committee training Launch emails for staff	Day 7	Mid-campaign review Report results to your United Way Staff Partner
Day 1	Kick-off event & United Way Presentation	Days 8-12	Special events Follow up with staff (in person or via email)
Days 2-5	Committee reaches out to staff	Day 13	Draw for new donors and those who increase by 15%
Day 6	Early Bird Donor Draw	Day 14	Wrap event

#### Sample Timeline: 3 weeks

Pre-campaign	Analysis and planning ECC and Committee training Launch emails for staff	Days 12-17	Special events Follow up with staff (in person or via email)
Day 1	Kick-off event & United Way presentation	Day 18	Draw for new donors and those who increase by 15% (or a percentage of your choice)
Days 2-5 Days 6-10	Committee reaches out to staff Early Bird Donor Draw Special event	Day 21	Wrap event
Day 11	Mid-campaign review Report results to your United Way Staff Partner		