



United Way
Central Alberta

Campaign Playbook





Introduction

Thank you for championing your organization's United Way campaign. We need your help strengthening vital programs and agencies in our communities so they can continue to deliver essential services to Central Albertans. It won't be easy, and it won't be overnight, but only by **uniting together** can we reach our collective vision of a thriving community where everyone can reach their potential.

This guide will offer you a few ideas for planning an exciting, engaging, and successful workplace campaign for colleagues working in-office or remotely. You will see tips on how to:

1. Raise awareness of community needs and opportunities to take action
2. Maximize participation in the campaign
3. Plan and run exciting special events
4. Consider some non-traditional ways to raise funds
5. Leverage partnerships between Organized Labour and Management

Your United Way staff partner is here to offer support and help you plan a campaign that fits your organizational needs, and don't be afraid to let your creativity flow!

United We Are Stronger.



Building Awareness

An important first step to planning your campaign is determining how to generate excitement, while also inspiring your colleagues of the campaign's impact in the community. Everyone digests information differently and employees may be more broadly located now, so plan to use multiple channels to ensure you capture the entire audience.

There are a number of ways we can do this: through Impact Communications, at the Kick-off, through your Union and Management champions, and virtual engagement.

Digital Communications

United Way has several digital content templates that can be used through a variety of your workplace internal communication channels, such as:

- Stories for internal newsletters, intranet, letters attached to paystubs, etc.
- Sample kick-off and reminder emails
- Employee brochures, impact reports, 1-pagers on particular issues, etc.
- Suggested social media content.

Campaign Kickoff Presentations

A virtual, in-person or hybrid kickoff has many benefits:

- **Ready, Set, Go!** A kick-off presentation clearly marks the start of your United Way effort to create 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
- **Stage Setting.** It demonstrates the passion your organization, your senior management and your colleagues have for the campaign and supporting our community.

Your United Way staff partner is here to support you and can help you plan and customize your kick-off event. We have created tools and resources to support you in hosting your campaign kick-off .





Kickoff Planning

1. Kickoff Format

Will you be hosting your kick-off in-person, virtually, or a hybrid of both? Your United Way staff partner can help you build your kick-off agenda and activities based on the format that works best for your team.

2. Send out a Kickoff SAVE-THE-DATE

Give your team lots of notice to reserve the kick-off time in their calendars. This will also be helpful in choosing a time your senior leadership are also free to join the kick-off. If you are piggy-backing your kick-off onto another meeting (town hall, health & safety meeting, shift huddle, etc.), ask the meeting leader to include the kick-off on the agenda far in advance as these meetings are typically jam-packed with information and short on time.

3. 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 kick-off, or see if there may be existing meetings you can piggyback on. Ask your senior leader to endorse the campaign live at kick-off or they can film a campaign endorsement video.

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.

4. 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. 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.

5. Determine the Agenda and Speakers

It is best if the Employee Campaign Chair (ECC) acts as facilitator to ensure your kick-off sticks to the agenda. Your United Way staff partner would love the opportunity to join the presentation and can present as well. 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.





Kickoff Planning

6. Make it Interactive

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

7. Raise Awareness About Impact

United Way has speakers that can join your meeting and facilitate awareness activities like our Making Choices Activity, or the in-person The Brain Game, showcasing the powerful role of relationships on early brain development. 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.

8. Set Clear Action Steps

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

9. Share the Event Schedule

If you are planning on hosting events throughout the campaign, share your event schedule with everyone. You can also put event invitations right into colleague's digital calendars.

Example Kickoff Schedule

Opening: 5 mins CEO ECC Sr. Leaders	Welcome <ul style="list-style-type: none">• 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
UW Awareness Activity: 7-12 mins Facilitated by United Way Central Alberta	Activity Examples: <ul style="list-style-type: none">• Making Choices Activity• UW & Company quiz• Group sharing "why I care about the community"• UW videos• Guest Speaker from United Way
Closing Remarks: 5 mins CEO ECC Sr. Leaders	CEO/ECC to thank participants and reiterate importance of UWCA <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.



Employee Giving

United Way Central Alberta can provide giving options that work best for your work environment. We have a wide variety of in-person and online resources to help support you.



E-Pledge

E-Pledge provides a personalized (and secure) online experience for each employee to make their donation online in less than 2 minutes. Results are tracked in real-time on a digital thermometer. There's no cost for setup. Reach out to your United Way staff partner to learn how to get started.



Fillable PDF Pledge Form

Our traditional paper pledge form is available in a digital fillable format. The document can be completed on your computer, saved as a PDF and sent to the campaign chair.



Paper Pledge Form

Paper pledge forms will be available for workplaces who are unable to reach their employees virtually.



Resource Library

Our online Toolkit & Resource Library is designed to get you started and provide everything you need to run a successful and fun workplace campaign. It includes videos of our ambassador stories available for sharing as well as a comprehensive Special Event guide to help you create excitement and bring your team together.

All posters, brochures, and collateral are available to download and can be printed at request.



Best Practices

Ambassadors & Canvassing

Ambassadors are key to the success of every campaign. These volunteers approach their peers in the workplace to raise awareness about United Way's vital role in the community and invite them to make an informed choice about investing in their community.

Ambassadors share 3 key messages with their colleagues:

1. Inform of the benefits United Way brings to our community and promote the campaign and activities going on at the workplace.
2. Ask peers to consider investing in the community through United Way.
3. Thank colleagues for their time and participation.

The most effective method of canvassing is done in person; either one-on-one or with a group. Encourage ambassadors to reach out to their peers over the phone or video chat platform so they can engage in a dialogue about the campaign.

It's important to ensure campaigns are inclusive and every employee has an opportunity to participate. Campaign Ambassadors ensure that whether employees are working virtually or in person, each employee is personally invited to help your workplace reach its goal to help our community.

Leadership Giving

With a donation of \$1,200 or more, our Leadership level donors are ready to drive change, willing to set a powerful example and become part of the solution to our community's complex social issues. United Way Leaders are passionate about leaving their mark on Central Alberta by creating lasting change.

Grow Your Leadership Giving Program

- Host a Leadership event and invite a United Way Leadership speaker. Have Ambassadors who are Leadership donors themselves follow-up with event attendees.
- Provide special incentives like giving a day off work for new donors giving at the Leadership level or increasing their Leadership gift by 10% over the previous year.
- Recruit a Leadership chair for your campaign committee to grow your Leadership donor program, by arranging your Leadership presentation, monitoring Leadership giving results, making personal outreach to ask for support and ensuring donors are thanked and recognized.

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



Best Practices

Employee Pledge Participation Incentives

Offering incentives can dramatically increase participation. Incentives can also be used to motivate early bird donations, new and increased giving, Leadership giving, continuous payroll, etc.

Some examples of incentive prizes include:

- Vacation time
- Electronics
- Lunch with CEO/Executives
- Golf with CEO/Executives at company tournament or UW tournament
- Gift cards
- Local brewery/winery packages
- Parking spots
- Early release on holiday weekends
- Pledge \$X or more and participate in all special events at no cost
- For each donation of \$X and we'll send _____ to 10 families
- If the organization raises \$X or reaches X% participation in the employee giving program, CEO/executives will grow a beard, shave head, pie in the face, etc.
- If organization reached X% participation in employee giving, all employees will receive X or are put into a draw to win X
- Tiered raffle system based on date, giving level. Eg. If you give at a Leadership level, you'll receive 5 ticket entries. If you give by Oct 5th, you'll receive 3 tickets in the draw. If you meet all the criteria, you receive all 3 incentives.

Retiree Engagement

Today's retirees remain vibrant and may still feel a strong allegiance to their former workplace and to United Way. Retiree campaigns help retirees feel like they continue to be a part of the organization. The most successful retiree campaigns simply involve letters sent and followed up on by someone from the campaign committee (even more powerful if followed by another retiree from the organization). Many retirees do not currently contribute simply because they haven't been asked. Know of a group of employees that will be retiring soon? Ask your HR department if retirees can have the option of deducting their United Way donation from their pension remittance. Or, ask if a monthly giving pledge form can be included in their off-boarding package - an easy way to transition their gift from payroll deduction. United Way has sample letter templates that can be included in retiree information packages.





Best Practices

Looking Back and Planning Forward

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

Previous Campaign Details

- Campaign Dates
- What kind of campaign did you have? (in-person, virtual, hybrid)
- How did your employees give? (ePledge, fillable pdf, paper?)
- Kickoff Event Details
- Special Events
- Speakers - general, leadership
- Attendance at events
- Volunteering
- Communications plan
- Number of committee members; was it enough? Too many?
- Amounts raised previous year? (Pledges, Special Events, Corporate gift or match)
- Total funds raised over the years
- # of employees; participation rate (# of employees/# of donors)
- # of leadership donors (\$1200 and above)

The Team

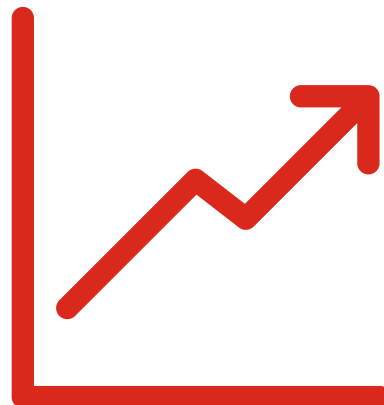
- Positions needed; ECC, leadership donors lead; events lead; thank you lead
- Did the ECC lead the pledge collections/processing?
- Do you have enough campaign representatives for follow up? Recommend one for every 10-20 employees.

Events and Pledges

- What kind of Kickoff would you like to have?
- What kind of special events or activities would you like to hold this year?
- Incentive prizes for early bird giving, 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 years participation rate = goal for # of donors needed
- Setting fundraising goal: multiply last year's total funds raised x 10% and add together





Wrap Up

- Use channels that are effective in your workplace (i.e. email, presentations, intranet articles, newsletters, etc.)
- Shoot a quick video of yourself expressing thanks and/or have the CEO do the same
- Announce achievements and share the impact made by your collective generosity
- Thank volunteers, colleagues and leaders for their participation in helping reach your goals
- Award prizes or incentives
- Remit special event funds and the final results to United Way Central Alberta

United Way sincerely thanks YOU for the important role you play in helping our community. Your innovation and commitment is helping to keep Central Alberta strong and connected now, and for years to come

