



AMBASSADOR TRAINING GUIDE

*Best practices, ideas and advice to help make
your workplace campaign a success*



United Way
Alberta Capital Region

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Ambassador Role Description

Your role as a United Way Ambassador is essential to the success of your organization's campaign and ultimately, to the well-being of your community.

Whether you're a veteran Ambassador or a novice, this guide provides you with the information and resources needed to communicate United Way messaging and support a successful campaign in your organization.

Your role as an Ambassador is to support your Campaign Committee and to engage 100% of your colleagues in the opportunity to participate and give.

United Way Ambassador Role Description

- » Ask every employee to give or make a decision
- » Share the details of your campaign and United Way messaging
- » Boost participation in pledge drive & campaign events
- » Personally follow-up with donors

Who is an ideal Ambassador?

An employee who is:

- » Community-minded and excited about United Way's impact in the Alberta Capital Region
- » A committed United Way donor
- » Enthusiastic and respected team player
- » Organized and flexible
- » A self-starter

Find more at myunitedway.ca

Find everything you need online to support a successful canvass:

- » Videos
- » Stories
- » Sample emails and letters

**In the best campaigns,
the volunteers ensure that:**

**100% of
employees
are...**

- INVOLVED
- INFORMED
- INSPIRED
- APPROACHED
- FOLLOWED UP WITH
- THANKED



Your support of United Way helps children, youth and families right here in the Alberta Capital Region.

You are a part of a big team!

Approximately 5,000 volunteers, 25,000 donors, 500 organizations from across our community – business, labour, the private and public sector, partners and organizations big and small – join together to create pathways out of poverty.

THE **BIG** PICTURE

United Way looks at the big picture in order to deliver a coordinated network of services and programs to address a range of needs for children and families who are struggling.

FOR EXAMPLE, ONE FAMILY MIGHT RECEIVE THE FOLLOWING STRATEGIC SUPPORTS:



**NUTRITIOUS
MEALS**



JOB TRAINING



SCHOOL SUPPLIES



**MONEY
MANAGEMENT**



**MENTAL HEALTH
SUPPORTS**

Why United Way?

United Way's mission is to mobilize collective action to create pathways out of poverty.



Lasting Solutions

Your donation helps deliver 100+ programs that lift people out of poverty and prevent those at risk from falling into it.



Local Impact

Our strategy is 100% local, ensuring that your help impacts families right here in the Alberta Capital Region.



Visible Results

We set clear targets and share the results, showing how your contribution changes lives.

Why is Asking One-on-One Important?

The number one reason people don't give...

...is because they weren't asked. Since not everyone will be able to attend your kickoff and others may want to ask more questions, it's important to follow up with each employee.

We recognize asking your co-workers for a donation may be intimidating.

We are here to help provide you with the training and resources to make the process easier. As your colleagues better understand the work of United Way and how their contributions impact the community, they will be more inclined to give.

» How to Ask

Know your campaign details

- » When is campaign kick-off/wrap-up and other key dates?
- » Does the early bird draw have a prize/incentive?
- » When are the special events?
- » What is your employee campaign goal?

Be prepared for questions and concerns

People deserve to know their money is being used wisely. If you don't know the answer to a question, find out from your Employee Campaign Chair or United Way staff partner and get back to your colleague promptly.

Make the Ask

One-on-one, peer-to-peer is the best way to make the ask. It allows you to inquire about their interests and inform them about how their dollars relate to their community. The strongest campaigns ask 100% of their employees and retirees to donate to United Way.

Follow-up and say "thank you"!

Ensure that all of your donors have had the opportunity to give. Then thank everyone who has made their decision.

Sample Ask:

"I just wanted to come by and drop off this United Way information. This year we are striving for 100% employee participation and any gift you make will be matched by the company! I have enclosed a brochure with more information about what your gift would support. Any gift will help people experiencing poverty in our community get the help they need.

If you have any questions about United Way, please let me or any of the Campaign Committee members know. Otherwise, thank you for your thoughtful consideration to pledge this year."

Include in any of the following:

- » Early bird prize draw due date
- » Personal story about why you support United Way
- » Promotion of goals, department challenges or results

Using the UnitedWay@work online E-Pledge system?

Be sure to also include personal, one-on-one elements to ensure success. Your United Way Representative can offer advice on how to keep employees actively engaged in your campaign.



Tips for Making the Ask...



Be positive.

It feels good to give. Some have already decided to give, they just need a reminder. Some just need more information.

It's also helpful if you share your personal reasons for supporting United Way.



Call on co-workers you know first.

Approaching people you know well allows you to be more relaxed and comfortable with each conversation. A one-on-one, face-to-face ask is the most effective.



Highlight the importance of each gift.

Talk about the impact of each individual's gift and the difference it can make to our community. For examples of your donation's impact please visit the Clip Sheets in the Campaign Resources section at myunitedway.ca/campaign.



Mention the ease of giving.

Payroll giving distributes the gift over 24 or 26 pay periods and your payroll gift is recorded on your T4 to make it easy at tax time. Donors can also give by credit card, cheque, gifts of securities and cash.



Contributing is voluntary.

Share your enthusiasm about giving and be a resource to help your co-workers gain the comfort level needed to make a knowledgeable decision about giving. Your role is not to pressure people to give.

Remember to thank everyone you contacted.

Even those who did not contribute deserve to be thanked for their time. Every person's time and gifts are valuable. The impression you leave is what people will remember when they think of the United Way.

Running Your Leaders of the Way Campaign (\$1,200+)

Leadership giving is a critical component of any campaign, as leaders often contribute 30%-50% of total employee dollars raised. It is important to have a strategy to retain and grow your leadership donor base, but it doesn't have to be complicated.

Best practices for Leadership Giving:

1 Recruit a Leadership Team

- » Your Leadership team members are ideally Leadership donors.
- » Team members make 1 on 1 asks of all Leadership donors.

2 Communicate with your Leaders (and potential Leaders!)

- » Develop a strategy to encourage Leadership gifts.
- » Share the impact of a \$1,200+ gift.
- » Thank your Leadership donors pre-campaign (for their past gift).

3 Drive Leadership Activity and Messaging

- » Host a Leadership event before your campaign kick-off to build momentum.
- » Book a United Way Leadership speaker.

4 Ask your Leaders to Give

- » Make your ask pre-campaign right after your Leadership event or kick-off.

5 Recognize your Leaders

- » Thank your Leadership donors!



I donate at the Leadership level and my employer matches my donation dollar for dollar, thus creating a bigger impact for the Capital Region, creating pathways out of poverty, looking for long term solutions for an end. Giving comes from the heart.

- Darlene Cardinal



We choose to support United Way as it has proven to us to be active in bringing creative solutions to assist our city in being better and helping those that need it the most.

- Anila Joy and family



Special Events

Special events can be great ways to both educate your workplace and build enthusiasm. The strongest campaigns encourage all staff to participate and learn about United Way while driving pledge submissions.

Special events should be:

» **Limited in Number**

» **Awareness-Builders**

The best special events educate about United Way and your employee campaign.

» **Free Before your Pledge Drive**

Special events can reduce employee pledges if they are conducted before the pledge drive.



This Everyday Hero event at Alberta Enterprise and Advanced Education was free for staff and focused purely on education and awareness around the \$365 giving level.

Remember that not everything you do has to make money. Sometimes just getting together for fun and team building can be a good way to remind people about your campaign.



Find a fun and unique event to draw staff and coworkers to your kick-off!

Gaming Licences

United Way allows approved workplace campaign events to be licensed under United Way's charity status with the Alberta Gaming and Liquor Commission (AGLC). Visit myunitedway.ca/campaign to find a gaming license application.

This includes:

» **Raffles and 50/50 Licenses**

» **Bingo**



Campaign Tips and Best Practices

Use “Early Bird” incentives to encourage donations.

Offer Early Bird incentive prizes for pledge forms returned by a specified deadline. Consider approaching customers or suppliers for prizes. Try one of these ideas for raffle or participation prizes:

- » Vacation Day(s)
- » Tickets to Movies, Sporting or Cultural Events
- » Coveted Parking Spots
- » Company Merchandise
- » Lunch with the CEO
- » Donations from your Organization’s Vendors
- » Restaurant Gift Certificates

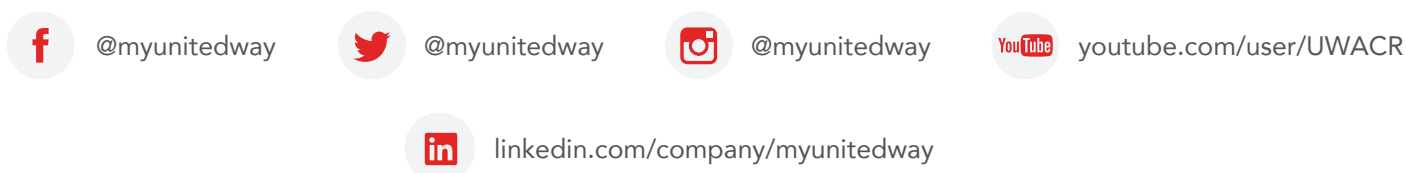
Remember: Special events can reduce employee pledges if they are conducted before the pledge drive.



Use Social Media to Share your Campaign Story!

Your United Way campaign demonstrates your commitment to fighting poverty in the Alberta Capital Region. Your hard work and passion make a difference, and for that your story deserves to be told.

Share, inspire and motivate others by telling your campaign story on social media using our handles below.



Sample Updates:

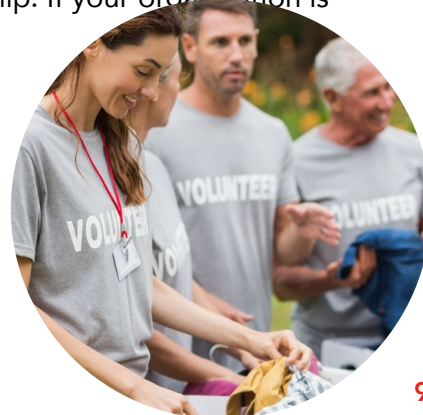


- » Tomorrow, we launch the @company campaign for @myunitedway. Together, we can change lives!
- » Great morning volunteering with @company today @myunitedway Thank you for all of your hard work!
- » Very proud of the hard work & dedication shown by @company staff as our @myunitedway campaign surpassed its goal by 65%!

Unionized Workplace - Engage your union leaders in the campaign.

United Way and organized Labour have a strong and longstanding partnership. If your organization is unionized, run a joint union and management campaign. Here are some tried-and-true tips that you should include in your campaign:

- » Ask an influential Union representative to be part of the committee
- » Invite your union representative to speak at kickoff
- » Seek prizes from union networks and partners
- » Ask to attend and present at a pre-existing union members meeting
- » Thank union leaders for their support



Canvassing Worksheet

Before you start asking your peers for support, take a few minutes to complete this information first!

Campaign Details

When does the United Way Campaign start? _____

When does the United Way Campaign end? _____

What is your organization's goal this year? _____

Is there a Corporate Match? Details? _____

E.g. Our employer will match 50% of all employee donations

How and when can employees give this year? _____

E.g. A secure link will be sent to your e-mail on XX date

Are there any extra incentives to give this year? _____

For example: Make your decision to give by Oct. 7 to participate in our draw for one day off with pay! Or If we reach our goal by November 13, our VP Steve Smith will shave his head!

Campaign Events

What events will employees want to know about? Details?

Is there a kickoff event? _____

Why do you support United Way?

Why do you support United Way and your workplace campaign?

Making the Ask

When should you start asking your co-workers for support? _____

What do employees need to know when you approach them? _____

How do you plan on asking your peers to support the United Way Campaign? Write it out below.

How do you plan on following up with your peers?

How will employees be thanked?

Canvassing Checklist – Who are you asking?

	Employee Name	Asked?	Followed up?	Thanked?
	Steve Smith	✓	✓	
1				
2				
3				
4				
5				
6				
7				
8				
9				
10				

	Employee Name	Asked?	Followed up?	Thanked?
	Steve Smith	✓		
11				
12				
13				
14				
15				
16				
17				
18				
19				
20				

Questions?

Who is my Employee Campaign Chair? _____

Who is my United Way Representative? _____



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