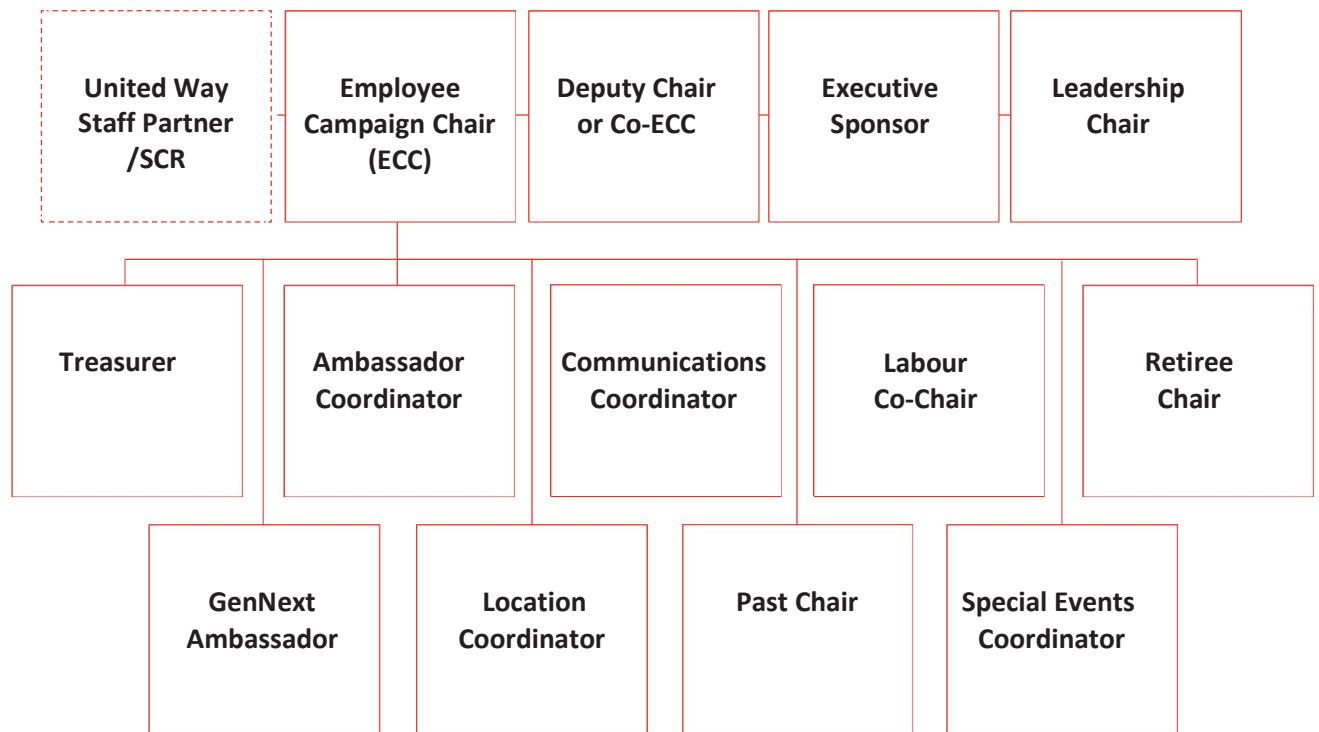


Building a Campaign Committee

Your campaign committee may include the following volunteer functions, some of which can be combined and handled by one person.



***SPECIAL NOTE: Communications Coordinator and Special Event Coordinator:**

In response to the unique circumstances surrounding COVID-19 and anticipated reliance on digital communication, including virtual meetings, engagement and event activities, United Way has built out new resources, tools and training to support your campaign efforts. We do recommend that those who take on these specific committee roles have prior experience in digital communication, virtual meeting and event delivery. Please see the Communications Coordinator and Special Event Coordinator role descriptions for more details.

Committee Position Descriptions

Employee Campaign Chair (ECC)

Role: Bring together the necessary people and resources to plan and implement a successful workplace fundraising campaign.

Key responsibilities:

- Attend United Way training and information sessions.
- Recruit a campaign committee and Ambassadors.
- Communicate with management, labour and employees.
- Play a lead role in developing a campaign plan, including goals, strategies and a timetable.
- Direct implementation of the campaign plan.
- Chair regular committee meetings.
- Monitor and communicate campaign progress.
- Address any problems or issues that arise during the course of the campaign.
- Maintain ongoing communication with United Way.
- Ensure funds are submitted to United Way on an ongoing basis.
- Ensure that volunteers, donors and suppliers receive appropriate thanks and recognition.
- Evaluate campaign results and make recommendations for next year.

Deputy ECC or Co-ECC

Role: Support the ECC, usually in preparation for taking on the role of ECC the following year.

Key responsibilities:

- Support the ECC in all aspects of their role.
- Gain a comprehensive understanding of the campaign in preparation for taking on the role of ECC.
- Participate as an active member of the campaign committee.

Executive Sponsor

Role: Represent the senior leadership team in your organization and secure necessary time, resources and support for the campaign committee.

Key responsibilities:.

- Approve the employee time necessary to plan and implement your campaign
- Rally support from senior & middle management
- Send a personalized message to each employee endorsing your campaign
- Attend and speak at campaign events
- Encourage and support the Leaders of the Way program

Leadership Chair

Role: Coordinate the approach to the retention and acquisition of Leadership donors (gifts of \$1,200+).

Key responsibilities:

- Attend a United Way Leadership campaign planning session.
- Develop a Leadership campaign plan.
- Identify potential Leadership donors.
- Arrange a Leadership presentation.
- Recruit and train Leadership Ambassadors.
- Monitor and report Leadership results.
- Ensure that all Leadership donors receive thanks and recognition.
- Evaluate the Leadership program at the end of the campaign and make recommendations for next year.
- Participate as an active member of the campaign committee.

Lead Ambassador

Role: Coordinate the recruitment, training and recognition of Ambassadors.

Key responsibilities:

- Attend a United Way Ambassador Training workshop, if appropriate.
- Help determine how many Ambassadors are required for each area
- Coordinate the recruitment of all Ambassadors.
- Arrange training for all Ambassadors, with additional attention to potential 'work-from-home' circumstances.
- Manage activities related to the planning and execution of the pledge drive.
- Communicate with Ambassadors on an ongoing basis.
- Monitor progress and assist with any problems that Ambassadors encounter.
- Ensure that Ambassadors are following up effectively with outstanding donors.
- Ensure that all Ambassadors receive adequate thanks and recognition.
- Evaluate the canvassing program at the end of the campaign.
- Participate as an active member of the campaign committee.

Ambassadors

Role: Serve as an Ambassador for the campaign and provide co-workers with an opportunity to make an informed decision about charitable giving.

Key responsibilities:

- Attend an Ambassador training session.
- Learn about United Way and the importance of their work in the community, why it is important to give back to the community and why your organization is running an employee workplace campaign
- Communicate the timetable, goals, events and incentives to co-workers.
- Ask co-workers to support the workplace campaign, answer questions and thank donors.
- Follow up with anyone who was away from the office or who has not made a decision.
- Monitor and communicate progress to your Ambassador Coordinator and/or ECC.

Campaign Committee Members (individual descriptions follow)

Role: Assist the ECC in the planning and implementation of a successful workplace fundraising campaign within their defined role.

Key responsibilities:

- Attend campaign committee meetings and appropriate United Way training sessions.
- Provide input into the overall campaign plan.
- Deliver on commitments according to the timetable established.
- Be an Ambassador for your workplace campaign and for United Way.
- Answer questions.
- Help provide thanks and recognition to donors, volunteer and other supporters.

Last Year's ECC

Role: Advise the ECC and the campaign committee.

Key responsibilities:

- Pass along last year's campaign results and recommendations.
- Participate in the development of the campaign plan.
- Attend and participate in campaign committee meetings.

Treasurer

Role: Coordinate all financial aspects of the campaign.

Key responsibilities:

- Develop an effective monitoring system for campaign returns (pledge form donations and special event money).
- Ensure that campaign security/privacy measures are adhered to.
- Oversee the tracking of campaign results.
- Arrange for the submission of all donations to United Way.
 - *This year we are supporting greater adoption of digital fund transfer, including EFT, whenever possible*
- Evaluate the financial systems at the end of the campaign and make recommendations for next year.
- Participate as an active member of the campaign committee.

Communications Coordinator

Role: Coordinate all campaign related communications.

Key responsibilities:

- Develop an effective communications plan for your committee members, as well as promote the company-wide campaign and educate employees about United Way.
 - With increased focus on digital communications this year, we recommend the person to take on this role have technical experience in this area, and receive United Way led volunteer training.
- Handle ongoing campaign communications including regular progress reports.
- Communicate final campaign results.
- Help deliver effective recognition for donors, volunteers and suppliers.
- Evaluate the communications plan at the end of the campaign.
- Participate as an active member of the campaign committee.

Labour Campaign Co-Chair

Role: Co-manager the campaign with the ECC in joint union-management campaigns.

Key responsibilities:

- Same as ECC
- Ensure that union members are integrated into every facet of the workplace campaign.
- Encourage union members to support United Way.

Retiree Chair

Role: Coordinate the approach for retired employees.

Key responsibilities:

- Help develop a retiree campaign plan.
- Help coordinate and sign any correspondence being sent to retired employees.
- Organize systematic follow-up.
- Monitor and report results of the retiree campaign.
- Ensure that retired donors receive adequate thanks and recognition.
- Evaluate the retiree program at the end of the campaign.
- Participate as an active member of the campaign committee.

Special Events Coordinator

Role: Plan and implement specific campaign events.

Key responsibilities:

- Develop a comprehensive plan for each event including promotion, resources, set-up, contingency plan and success measurements.
 - With increased focus on virtual meetings and events this year, we recommend the person to take on this role have technical experience in this area, and receive United Way volunteer training.
- Recruit additional support from someone who does have the technical expertise.
- Effectively implement special events and/or manage a sub-committee.
- Evaluate the effectiveness of special events at the end of the campaign.
- Participate as an active member of the campaign committee.

Location Coordinator

Role: Coordinate the integration of different geographic locations in the campaign.

Key responsibilities:

- Ensure that location needs are appropriately addressed by the overall campaign plan.
- Enlist volunteers at the location level, including Ambassadors.
- Ensure that location volunteers receive adequate training, information and support, with additional attention to potential 'work-from-home' circumstances
- Ensure that locations feel connected to the overall campaign.
- Track location progress and report it to the overall campaign.
- Ensure that location donors, volunteers and other supporters receive adequate thanks and recognition.
- Evaluate location performance and integration at the end of the campaign.
- Participate as an active member of the campaign committee.

GenNext Ambassador

Role: Coordinate the effort to engage employees in their 20s and 30s with the campaign.

Key responsibilities:

- Help develop a GenNext campaign plan.
- Help coordinate any correspondence being sent to younger employees.
- Help coordinate event(s) for GenNext employees during your campaign.
- Pass on communications about volunteer opportunities and events from United Way.
- Monitor and report results of the GenNext campaign, including evaluation at the end of the campaign.
- Participate as an active member of the campaign committee.

United Way staff partner

(Account/Campaign Manager and Sponsored Campaign Representative)

Role: Provide information, material and strategic advice on best practices.

Key responsibilities:

- Attend campaign committee meetings, as appropriate.
- Assist with committee orientation, campaign debrief session, Ambassador, Communications and Special Event lead training, group information sessions, mid-campaign review, etc.
- Help arrange United Way Speakers, Agency Tours, and Day of Caring, events, etc.
- Provide information.
- Collect information on the progress of your campaign to monitor the progress of the overall campaign.
- Assist with the preparation and submission of campaign funds.
 - This year we are supporting greater adoption of digital fund transfer, including EFT, whenever possible
- Assist with final campaign evaluation.