



EMPLOYEE CAMPAIGN CHAIR TRAINING GUIDE



United Way
Alberta Capital Region

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Thank you for volunteering with United Way!

Your role as **Employee Campaign Chair (ECC)** is essential to the success of the campaign in your organization and ultimately, to the well-being of your community. Thank you for taking on this vital role.

In the best campaigns, the ECC ensures that:

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

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

Employee Campaign Chair Role Description

- » Lead and direct the United Way Employee Campaign within your organization
- » Educate employees about United Way and how their contributions affect their community
- » Inspire employees to contribute
- » Facilitate the collection of employee gifts and submit to United Way

Key Responsibilities

- » Attend United Way training and information sessions
- » Recruit a campaign committee and Ambassadors
- » Communicate with management, labour unions, and employees
- » Play a lead role in developing a campaign plan, including goals and strategies
- » Monitor and communicate campaign progress and address any problems that arise
- » Ensure that volunteers, donors, and suppliers receive appropriate thanks and recognition

Benefits to You

- » Opportunity to learn/develop leadership skills
- » Lead a project from start to end
- » Develop fundraising skills
- » Get to know your colleagues and gain deeper knowledge of your organization
- » Make a difference in your community

We are here to help!

Leading a United Way workplace campaign can be intimidating, but we are here to help!

A United Way Representative has been assigned to assist and guide you through your campaign.

Call us at **780-990-1000** to be connected to your representative.



LET'S CHANGE LIVES **TOGETHER**

United Way is the platform that turns your social purpose into maximum social impact, creating positive change in the lives of vulnerable neighbours in our communities.

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



**NUTRITIOUS
MEALS**



JOB TRAINING



SCHOOL SUPPLIES



**MONEY
MANAGEMENT**



**MENTAL HEALTH
SUPPORTS**

Why United Way?

By taking a systems-wide approach to collaborate and deliver local programs and services, United Way creates resilient, connected, and thriving communities right here in the Capital Region.

Lasting Solutions

Your donation helps deliver 100+ programs and services that create resilient, connected, and thriving communities where no one is left behind.



Local Impact

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



Visible Results

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



Campaign Planning Checklist

Running a successful Employee Campaign requires diligent planning and the coordinated efforts of a strong, committed Campaign Team. Use the following checklist as a guide for planning and implementation.



Review Last Year's Campaign

Speak with past Employee Campaign Committee Chairs and members. Review previous strategies/tactics, timelines, and results. Ask about what worked and what could be improved.



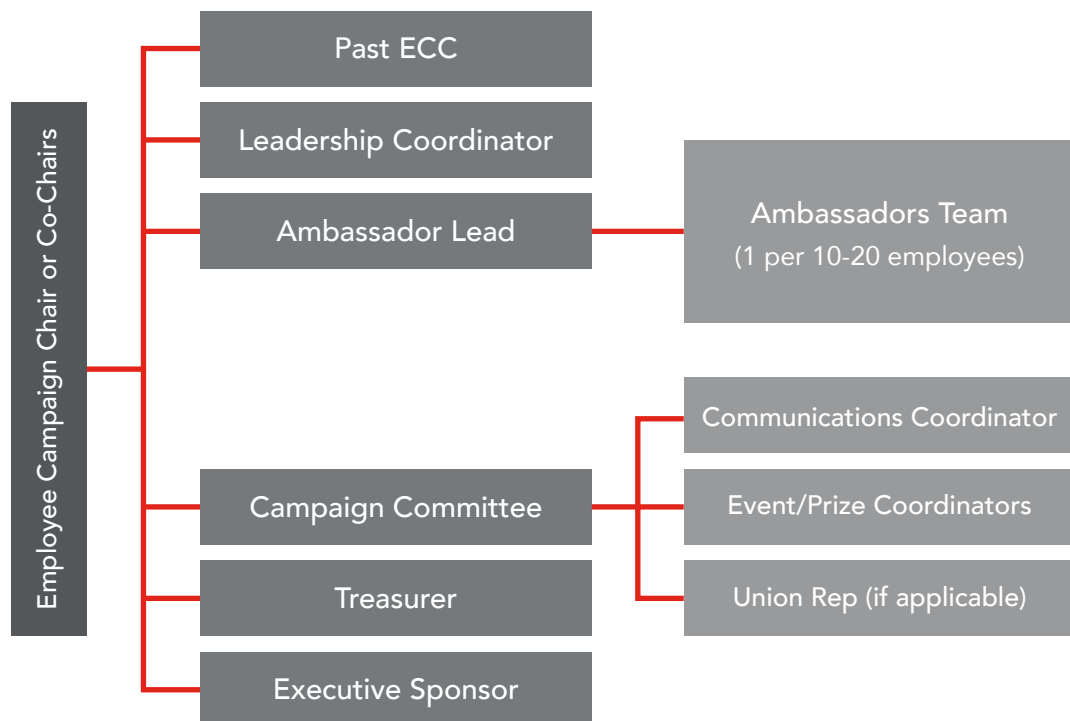
Meet with your United Way Representative

They will guide you through the next steps and support you throughout your campaign. Plan early to review last year's campaign, strategize for the upcoming campaign, and learn about new tools and materials. Call us at [780-990-1000](tel:780-990-1000) to be connected with your appointed representative.



Recruit your Campaign Team

Having a campaign team will allow for different ideas, shared workload, and a great team building opportunity. Ideally, a campaign committee is comprised of members from all departments, levels, and locations of your organization and union(s), if applicable.





Invite Senior Management Support

The support of senior management in your organization is critical to the success of your campaign. Ask your CEO to assist and support the campaign by:

- » Approving the employee time necessary to plan, implement, and participate in campaign activities
- » Appointing a senior management liaison to your committee
- » Sending a personalized message to each employee endorsing your campaign
- » Attending and speaking at campaign events



Set your Goals and Initiatives

Be brave as well as realistic when setting your goals for the year. Plan for 100% of your team to be involved, informed, inspired, approached, followed up with, and thanked!

Here are a few key goals that drive friendly competition and results:

- 1 Participation or Decision Rate (% of employees who make a decision to give)
- 2 Pledges (total raised)
- 3 Impact (how your campaign's goals connect with your organization's desired community impact)



Initiate a Leaders of the Way Campaign (\$1,200+)

Simply, a Leaders of the Way campaign focuses on gifts of \$1,200 or more. Find out how to implement this important strategy on page 10. Leadership donors are a critical component of any campaign. Talk to your United Way Representative about strategies to maintain your current Leaders, and encouraging potential Leaders to join.



Build Awareness of United Way

We have a variety of materials, tools, and opportunities available to educate and engage your peers in the work of United Way.

- » **United Way Videos & Speakers:** Our video and speaker roster represents a mix of individuals who have been helped and funded agencies who will share stories of community members who have been supported. For more information, visit myunitedway.ca/speakers.
- » **Days of Caring:** This is an opportunity for employees to come together and make a difference in our community by taking part in a meaningful, hands-on activity. Call us at **780-990-1000** for details.
- » **The Poverty Simulation:** This is a unique, interactive experience designed to provide a glimpse into what it might be like to be a low income family trying to survive from month to month. For more information and dates, visit myunitedway.ca/poverty-simulation.

For more ideas and resources please connect with your United Way representative or visit myunitedway.ca/campaign.



Kick Off your Campaign!

Inspire your colleagues to get on board. Plan a kickoff event that aligns with your workplace culture. Some ideas include: lunch and learn presentations, community partner tours, and office-wide events.



Kick your campaign off with an event that will engage, boost morale, and bring your coworkers together.



Keep it Fun!

The more fun you can make your campaign, the better chance you'll have at capturing your colleagues' attention and telling the United Way story.



Make a Personal Ask

The top reason people don't give? They weren't asked. So make the ask! Here's how:

» Know your Campaign Details

When is your campaign kickoff? What's your campaign goal? How much money was raised last year? When are the special events you've planned? Are there any prize incentives?

» Be Prepared for Questions and Concerns

Make sure you are familiar with what United Way does and know the answers to our most frequently asked questions. If people ask a question you don't have the answer to, tell them you'll find out and get back to them promptly. Then, connect with your United Way Representative to get the answer. It is okay not to know!

» Make the Ask

One-on-one, peer-to-peer is the best way to ask. You can find out about their interests and connect them to United Way's work in that area.

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

» More Tips:

» Call on Co-workers you Know First

Start by approaching the people you're most comfortable with first. You'll gain confidence and be ready to approach those whom you don't know as well after.

» Mention the Ease of Giving

Encourage giving through payroll. Emphasize how their gift can be spread over 24 or 26 pay periods. Be sure to tell them that their payroll gift is recorded on their T4 so it's easy at tax time. This could also be a good time to remind them about tax breaks: charitable giving gives back.

» Contributing is Voluntary

Share your enthusiasm and be a resource to help your co-worker make an informed decision about giving, but don't pressure people to give.



Hold a Mid-Campaign Update Meeting

Schedule a mid-campaign update meeting with your committee and your United Way Representative. At the mid-point of your campaign, dollars should be 70% of your campaign goal. This meeting is an opportunity for problem-solving, motivating your team, and thanking them for their efforts to date. It creates action steps to ensure you reach your goal.



Follow Up

It is much easier to renew a gift than it is to acquire a new gift. Personal check-in reminders are appreciated by donors and help to ensure everyone has been given the opportunity to give.

Keep your workplace informed of your progress. Regularly submit your Employee Campaign Report and all pledge forms to your United Way Representative and report final results to employees.



Wrap Up and Celebrate Impact!

You announced your goal to your colleagues at the start, and now it's time to tell them what you accomplished. Host a wrap-up event or announce it at an all-staff meeting so that everyone can share in the success of the campaign.



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

Leadership giving is a critical component of any campaign, as leaders often contribute approximately 25% 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 one-on-one 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
- » Free to Attend
- » Held Before your 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 Alberta Gaming, Liquor and Cannabis (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

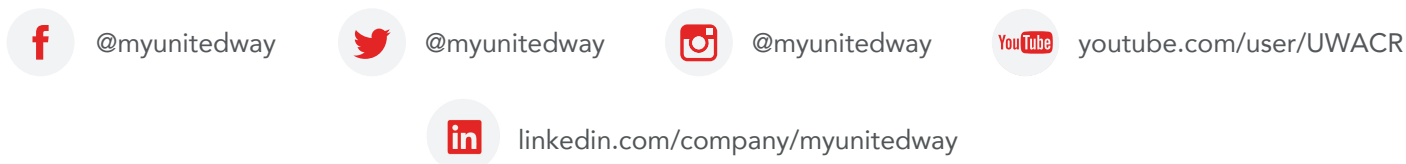
Remember: Special events can reduce employee pledges if they are conducted before the pledge drive.



Use Social Media to Share your Campaign Story!

Your United Way campaign demonstrates your commitment to creating positive change 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





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