

# EMPLOYEE CAMPAIGN TRAINING GUIDE

**Best Practices for Workplace Campaign Volunteers**

---

JULY 2024





## Table of Contents

About Workplace Campaigns .....	3
Why Run a Workplace Campaign .....	3
We're Here to Help .....	3
Planning Your Campaign .....	4
Review Last Year's Campaign .....	4
Meet with your United Way Representative .....	4
Recruit Your Campaign Team .....	4
Invite Senior Management Support .....	5
Set your Goals and Initiatives .....	5
Raising Awareness .....	6
Asking for Donations .....	7
Planning Your Ask .....	7
Making Your Ask .....	8
Following Up .....	8
Engaging Leaders of the Way (\$1,200+) .....	9
Engaging Labour .....	9
Celebrating Your Campaign .....	10





## About Workplace Campaigns

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 our community.

On behalf of United Way, thank you for lending your knowledge and leadership to our organization. We look forward to working with you throughout the coming year.

### Why Run a Workplace Campaign

Over the course of your workplace campaign, your staff build bonds, form new networks, have leadership opportunities, and grow their skills as they work together towards a shared goal. Your team can participate through unique experiential learning, networking, leadership development, volunteerism, events, impact speakers, tours, product drives and donations, and philanthropic giving to strengthen your organization's role in creating a better community.

### We're Here to Help

A dedicated account representative, supported by our strong delivery team, will be there every step of the way to facilitate making your workplace campaign a great experience for you and your teams. This hands-on and highly participatory approach demonstrates your organization's commitment, and supports employee attraction, retention, and engagement.

Our [Campaign Toolkit](#) hosts a robust suite of resources, materials, tools, and guidance for running your workplace campaign and provides your employees with immersive personal and professional development opportunities, team-building exercises, engagement activities, and positive recognition and celebration for the difference they are making in community.

#### Resources include:



Event & Engagement  
Activity Guide



AGLC Resources,  
Licenses & Forms



Communication  
Guides & Assets



Donation & Tax  
Receipting  
Information





## Planning Your Campaign

Set your workplace campaign up for success with diligent planning and the coordinated efforts of a strong, committed Campaign Team.

### 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

Your United Way representative is an important asset who can provide resources and materials, along with strategic advice and best practices to 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.

Your Representative can also assist with committee orientation, campaign debrief session, campaign committee training, and group information sessions. They can help arrange United Way engagement opportunities such as Impact Speakers, Agency Tours, Days of Caring, events, etc. United Way is also here to help monitor the progress of the overall campaign, assist with the preparation and submission of campaign funds, and support the final campaign evaluation.

Call us at 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.

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

**Deputy ECC or Co-ECC:** Supports the ECC, usually in preparation for taking on the role of ECC the following year.

**Executive Sponsor:** Represents the senior leadership team in your organization and secure necessary time, resources and support for the campaign committee.





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

**Lead Ambassador:** Coordinates the recruitment, training and recognition of Ambassadors.

**Ambassadors:** Provide co-workers with an opportunity to make an informed decision about charitable giving.

**Campaign Committee Members:** Assist the ECC in the planning and implementation of a successful workplace fundraising campaign within their defined role. Positions can include:

- **Last Year's ECC:** Advises the ECC and the campaign committee.
- **Treasurer:** Coordinates all financial aspects of the campaign.
- **Communications Coordinator:** Coordinates all campaign-related communications.
- **Labour Campaign Co-Chair:** Co-manages the campaign with the ECC in joint union-management campaigns.
- **Retiree Chair:** Coordinates the approach for retired employees.
- **Special Events Coordinator:** Plan and implement specific campaign events.
- **Location Coordinator:** Integrates different geographic locations into the campaign.
- **GenNext Ambassador:** Focuses on engaging employees in their 20s and 30s during the campaign.

## Invite Senior Management Support

The support of senior management in your organization is critical to the success of your campaign. Ask your CEO and other organizational leaders to 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 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:

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





## Raising Awareness

In addition to raising money for United Way, your workplace campaign energizes your workplace, strengthens your team, and creates a sense of community.

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

We have a variety of materials, tools and opportunities available to educate & 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 agencies that we fund who will share stories of service recipients who have been supported.

**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 with some of United Way's funded partner agencies. 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 live in a low-income family trying to survive from month to month. For more info and dates visit: [myunitedway.ca/poverty-simulation](https://myunitedway.ca/poverty-simulation).

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.

To learn about these opportunities or find even more ideas and resources, please connect with your United Way Representative or check out the [Event & Activity Guide](#).





## Asking for Donations

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.

### Planning Your Ask

Use the following checklist to help you prepare for asking your peers for support.

#### Know your Campaign Details

- When does the United Way Campaign start and end?
- What are some other key dates and campaign activities?
- What is your organization's goal this year?
- Is there a Corporate Match? Details?
- How and when can employees give this year?

#### Share Your Why

It's helpful if you share your personal reasons for supporting United Way. You can also talk about the impact of each individual's gift and the difference it can make in our community.

#### Incentivize Giving

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)
- Coveted Parking Spots
- Lunch with the CEO
- Gift Cards
- Tickets to Movies, Sporting or Cultural Events
- Company Merchandise
- Donations from your Organization's Vendors

#### Be Prepared for Questions and Concerns

People deserve to know their money is being used wisely. 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 that 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!

## **Making Your Ask**

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.

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.

## **A 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 more information about what your gift would support. Any gift will help United Way ensure no one in our community is left behind.

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.

## **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.

## **Following Up**

Ensure that all of your donors have had the opportunity to give. Personal check-in reminders are appreciated by donors.







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.

## Keep Track

Monitor your progress by tracking who has been asked, following up, and thanked.

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.

## Engaging Leaders of the Way (\$1,200+)

A Leaders of the Way engagement strategy focuses on gifts of \$1,200 or more. Leadership donors are a critical component of any campaign.

### Recruit a Leadership Team

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

### Connect 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).
- Host a Leadership event before your campaign kick-off to build momentum.

### Ask your Leaders to Give

- Book a United Way Leadership speaker.
- Make your ask pre-campaign right after your Leadership event or kick-off.
- Thank your Leadership donors for their support.

## Engaging Labour

Organized labour and United Way of the Alberta Capital Region share the goal of making the community a healthy place to live, work and raise a family. Our partnership was formalized in 1978, when the United Way signed an agreement with the Edmonton and District Labour Council to have a Labour Coordinator on staff working for and with organized labour.





Here are some suggestions to engage unionized staff during your workplace campaign:

### Invite labour leadership to support the campaign

- Ask the union to name a representative to join your campaign committee, act as a consultant for the campaign, or recruit Ambassadors who are members of affiliated unions. Let your employees know they are involved.
- Provide a union letter endorsing the campaign (from your local union executive and/or from the union's national office). These letters can be posted on your intranet, inserted into payroll envelopes, posted in the employees' lunchrooms or distributed at meetings, etc.
- Invite labour leadership to personally support the campaign (speak at key events, attend or volunteer at special events, etc.)
- Ask leadership to host a campaign event for members within your workplace (e.g., barbeque, breakfast, etc.).

### Raise awareness of labour's history of United Way support

- Include labour speakers at key campaign events (Ambassador training, kick-off, wrap-up, etc.).
- Be knowledgeable about the services provided by the [Labour Community Advocate Program](#). This program provides an avenue for union members to help their brothers and sisters who have job related or personal problems.

## Celebrating Your Campaign

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.

You can also use social media to share your workplace campaign story, demonstrating your organization's commitment to creating meaningful change in our community. Learn more about sharing your United Way story with the Communications Resources in our [Campaign Toolkit](#).

