

I believe in my
community.

I believe that its success
depends on the people
who live in it.

That everyone has
something to contribute.

That everyone deserves
respect.

That everyone's
potential can be
realized.

That diversity is vital.

That every person has
value.

That everyone needs
help and everyone can
offer help.

That a safe, supportive
community is everyone's
responsibility.

I believe in possibility.



EMPLOYEE CAMPAIGN COORDINATOR TRAINING AND INFORMATION GUIDE

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Online resources

Communicating United Way's message in your workplace assists donors in making informed decisions about their donations, and helps them understand how United Way creates positive and lasting changes in people's lives.

To make your job easier, we have facts, resources and tools readily accessible for you online at www.unitedwaynbc.ca, under campaign/campaign toolkit.

What to Say about United Way

We need your financial support to help find solutions to YOUR community's most pressing issues.

A community's success depends on the people who live in it. With your help, United Way of Northern British Columbia is building a healthy, caring and inclusive community. We're strengthening our communities and region by focusing investments on five priority areas: successful kids, empowered families, involved seniors, supportive communities and healthy citizens. By addressing the underlying causes of the most critical social issues facing these groups, such as poverty reduction, food security, literacy rates, isolation, and rehabilitation, we're creating a better place for everyone who lives here.

We believe that everyone's potential can be realized.

What is the issue? 25% of children entering kindergarten in northern BC lack the skills needed to succeed in school. Literacy rates of children in northern BC are among the lowest in the province. Family relationships are under stress through a variety of forces. Social and recreational activities need to be broadly supported for youth, teens, and the "missing" age group of 17-23 years old. Accessibility to general and recreational activities can mitigate issues around stress in the household and can build stronger families and thus stronger communities.

What is our impact on this issue? Every \$1 invested in early childhood programs equates to a \$7 return on investment in later years. Through early childhood development programs, United Way is committed to significantly increasing the number of school-ready children. United Way gives families the tools they need to give children a good start. Programs and services include literacy, nutrition and parenting support. We fund a youth crisis line, intervention programs to prevent youth from becoming involved in crime and drugs, programs for children involved in parental divorce or death, and education programs for parents to learn to deal effectively with youth at risk. United Way works with our partners to intervene in negative family environments. Prevention and early intervention programs are critical for these children. We support shelter, counseling and guidance for women and children who have witnessed violence, and support for sexual abuse victims and their families. **We believe in successful kids and empowered families.**

We believe that everyone has something to contribute.

What is the issue? The seniors' population is undergoing significant growth. Services are either not available or simply not keeping pace. Older people often need assistance in order to continue to live independently and participate in community life. Physical limitations, shrinking social networks and declining income are among the many challenges seniors face. Many caregivers must balance care responsibilities for children and older relatives. With little to no foundation of services and programs for the aging population, many services must be created from scratch.

What is our impact on this issue? United Way is committed to helping seniors remain healthy, independent, contributing members of the community. United Way engages seniors through housing support, care giving, social networking and outreach. United Way assists organizations to establish programs and services that provide support to seniors and their caregivers. **We believe in involved seniors.**

We believe that everyone deserves respect.

What is the issue? 10% of the population lives with a physical disability. The rate of brain injury in northern BC is more than double the national average. Nearly 20% of northern BC residents are living below the poverty line, the number of families affected by HIV is increasing, drug-related crimes are on the rise. Annually, 8,000 adults and teens facing life-altering events, emotional stress, or thinking of ending their lives call the crisis line.

What is our impact on this issue? United Way supports education programs for those living in poverty, adult and teen crisis lines, programs for victims of crime, those dealing with substance abuse problems and people affected by HIV. United Way helps individuals escape negative lifestyles and reintegrate into the community. United Way plays a lead role in supporting local agencies to ensure all residents with mental health issues, hearing and visual impairments and survivors of brain and spinal cord injuries have access to the equipment and services they need to live healthy lives and participate fully in the community. **We believe in healthy citizens and safe, supportive communities.**

How Can You Help?

Your role as Employee Campaign Coordinator (ECC) is central to the success of the campaign in your organization and, ultimately, to the well-being of your community.

As an ECC, your role is to:

- Lead and direct the United Way Employee Campaign within your organization, motivate your campaign committee and inspire people to give.
- Help employees understand what United Way does and how contributions to United Way directly affect their community.
- Give all employees an opportunity to invest in what matters for their community through United Way.

No individual, company or agency, working alone, can achieve as much as we can by all working together. The majority of donations raised by United Way comes from employees contributing at their workplaces.

Be recognized for your efforts. Profile your organization or campaign team with an award nomination.

Check out our website for more information www.unitedwaynbc.ca.

Thank you for giving your time to help change someone's life.

Campaign Planning Checklist

Running a successful Employee Campaign requires diligent planning and the coordinated efforts of a strong, committed Campaign Team. We've created the following checklist to help you and your team during each phase of planning and implementation.

Meet with your United Way staff partner or Loaned or Sponsored Representative

Target Completion Date:_____

Review last year's campaign, strategize for this year's campaign and learn about new campaign tools and materials.

Plan Your Campaign

Target Completion Date:_____

Identify strengths and opportunities for growth from your previous campaign. Set participation and financial goals for your campaign. Work with your Campaign Team to develop a detailed timeline and calendar of events using the campaign plan section of this guide. Order campaign supplies from your United Way representative.

Visit www.unitedwaynbc.ca to obtain logos, graphics, stories, photographs, sample endorsement letters and other useful materials.

Recruit Your Campaign Team

Target Completion Date: _____

Your team should include members from all departments, levels and locations of your organization. Remember to include team members to represent second and third shift employees as well as union members.

- A Leadership Chair to be responsible for initiating the Leadership Giving Campaign in your workplace (\$1,000+)
- Campaign Representatives for peer-to-peer solicitations, which is the most effective method of fundraising. Strive to recruit one representative for every 10-20 employees.
- A United Way staff partner or Loaned or Sponsored Representative on your team who can offer ideas, train team members, order supplies, request community speakers, make presentations and much more.
- Ensure you have your team recruited in time to get orientation dates into their calendars.

Train your Team! Educate your team members on United Way's role in the community

Target Completion Date: _____

Register your team for a Campaign Training Workshop. Energize your Campaign Team by sharing United Way's work in the community. Invite your Leadership Chair to a Leadership Best Practices session provided by United Way, or a United Way staff partner to deliver an abbreviated training session at your workplace.

Hold a Campaign Representative training session at your workplace; your United Way staff partner facilitates this.

Initiate Leadership Giving Campaign (\$500+)

Target Completion Date: _____

Meet with your Leadership Chair to coordinate your Leadership Giving Campaign plan. Review your organization's list of past Leadership donors. Contact United Way for this list and confirm the donors are still employed at your organization. Provide United Way with a list of prospective Leadership donors. These are individuals who are not on the list of past Leaders whom you feel have the potential to increase their giving. United Way prepares personalized Leadership pledge forms and packages for these donors. Utilize United Way's Leadership Giving staff team and special Leadership Giving events to encourage giving.

Kick-off – Engage donors and employees

Target Completion Date: _____

Inspire your colleagues to give with large-group kickoff meetings, lunch & learn presentations and community partner tours. Host a United Way presentation for your employee group to create awareness among all staff and demonstrate the impact their gift to United Way has in our communities. Spread United Way's message via intranet, email, voice mail, management/union endorsement letters, newsletters, desk drops and notices included with pay cheques.

Utilize United Way brochures, posters and videos/DVDs. *If you currently use online pledging at your organization, be sure to also include personal, one-on-one elements to ensure success. Your United Way staff partner or Loaned or Sponsored Representative can offer advice on how to keep employees actively engaged in your campaign.*

Make the Ask

Target Completion Date: _____

Strive to ASK 100% of your organization's employees and retirees to donate to United Way. Do a one-on-one, peer-to-peer ask with personal follow-up.

Ask selected employees (based on salary grade or title) to give at the Leadership level with gifts of \$500+.

Please remember not to pressure employees to give. If people give to United Way simply because they feel it is expected in their workplace, they may develop negative feelings toward United Way. We want donors to feel the joy of giving to others, knowing their investment is making a significant difference to people in our community.

Report Results

Target Completion Date: _____

Schedule a mid-campaign update meeting with your committee and your Loaned or Sponsored Representative. At the midpoint 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.

Submit money and reports at mid-campaign and again within two weeks of the end of your campaign. Early submission ensures your colleagues' gifts are processed and Leadership donors are thanked in a timely manner.

Deliver all forms for payroll deduction gifts to your payroll department. Keep your employees informed on campaign progress using email or posted thermometer. As campaign is running, regularly submit your Employee Campaign Report and all pledge forms to your United Way staff partner or Loaned or Sponsored Representative and report final results to employees. Every donor appreciates timely deduction of their credit card gift.

Say Thank you!

Target Completion Date: _____

- Thank all donors and volunteers who have made your campaign a success.
- Use United Way thank-you cards to thank employees who have made a donation. United Way provides thank you letters and certificates to our entire Campaign Team.
- Hold a thank-you event for employees.
- Host a table and invite your Campaign Team and campaign representatives to the United Way Community Campaign Celebration and Awards event in the March.
- Invite United Way to report back to staff on the impact of their donations. A presentation or community partner tour in the months following your campaign reinforces the value of donors' gifts and make your job easier next year.

Campaign Best Practices

The strongest campaigns have a number of things in common – we call them our **Campaign Best Practices**. Incorporating these elements into your campaign can dramatically increase your success.

Obtain Management Support

It is essential to have visible support from your senior management team. Getting involved in a United Way campaign is a great way for management to interact with employees and demonstrate their commitment to our community.

Here are some suggestions:

- Identify a 'mentor' from the senior management team. This person serves as your link with senior management and may sit on your Campaign Committee. He or she is helpful conveying your campaign plans to the senior management team, canvassing, trouble-shooting and securing
- management support for campaign events.
- Include United Way on the agenda of all senior management meetings. Request time to share the campaign plan, for staff volunteers, and other resources.
- Share all relevant campaign information with senior management, including your campaign plan, results of your Mid-Campaign Meeting, and conclusions from your final evaluations.
- Ask senior management to play an active role in the campaign by supporting volunteers in their individual areas and asking them for regular campaign updates, offering assistance and providing appropriate recognition.

A Visible Senior Management Representative Can:

- Announce your role as ECC to the workplace.
- Attend the first committee meeting to give a personal endorsement.
- Attend the Campaign Representative orientation session.
- Send a letter to all employees asking for their support and inviting them to campaign activities.
- Attend group presentation and give a personal endorsement.
- Arrange for and attend a wind-up event for the committee, e.g. wine and cheese reception.

Recruit a Union Representative

United Way has a strong partnership with Labour. If your workplace is unionized, please ensure unions are represented on your committee and as Campaign Representatives.

Include a Leadership Giving Campaign

Leadership Giving is a United Way program for individual donors who make annual gifts of \$500+.

A Leadership Giving Campaign allows employees to have a greater impact on communities throughout Northern BC and sets your organization apart as a leader. See page 10 for more details. A Leadership Giving Campaign promotes and recognizes annual personal contributions using the levels outlined below:

Recognition Name Giving Level

Leader \$500 - \$999

Community Builder \$1,000+

Set a Participation Goal

By focusing on participation, you substantially increase your campaign dollars. By setting a participation goal, employees can rally together to encourage more people to give. Remember, every gift counts. **Ensure every employee is personally asked to give.**

People do not give if they are not asked!

Inform and Inspire Employees

When employees hear about the impact United Way makes in their community, and see the evidence first-hand, they are eager to play a part. Give employees ample opportunity to learn about United Way by offering a variety of educational events such as community partner tours. Speak to your United Way staff partner or Loaned or Sponsored Representative for assistance and scheduling.

Community Speakers and Community Partner Tours give employees a glimpse into the impact of their donations by hosting a community speaker or organizing a community partner visit.

Distribute Pledge Forms

Use pledge forms to ensure everyone has the opportunity to give. Get help from your Human Resources or Payroll Departments.

Ask for all Pledge Forms to be Returned

Request all employees return their pledge forms whether or not they are donating. This simplifies tracking, helps maintain confidentiality (if returned in an envelope) and results in some additional donations. It ensures all employees make a decision and lets Campaign Representatives know they no longer need to follow up.

Year-Round Communications

Take advantage of non-campaign months to educate employees about United Way. Many organizations use intranet, email and community speakers to educate employees and to grow future campaign participation rates. Stay in touch with your United Way staff partner and visit www.unitedwaynbc.ca periodically to keep informed.

Institute a New Employees Program

When new employees start with your company, make sure to give them a pledge form and discuss your organization's commitment to supporting the community through United Way. Most new employees are happy to start their giving right away and will continue to give when you run your campaign.

Establish a Retiree Campaign

Retirees represent a pool of potential donors who may not be captured in your current campaign. With more people retiring every day, a Retiree Campaign is also an excellent way to ensure existing donors stay connected.

Your organization may already be communicating with this group. Your Retiree Campaign may be as simple as including a brochure and pledge form with an existing mailing, sending a separate mailing to this group, or arranging for a presentation at a retiree gathering. Better still, involve an active retiree in the effort, the message is more meaningful from a peer.

Seven Steps to a Successful Leadership Giving Campaign

Step 1: Request management support

- Meet with your CEO to request their personal involvement in the Leadership Giving Campaign.

Step 2: Recruit and train a team

- Recruit a small team of individuals to support Leadership Giving Campaign efforts. Ensure you have enough canvassers on your team to canvass potential leadership donors one-on-one. We recommend peer-to-peer canvassing and that each canvasser approaches a maximum of 10 donors.
- Attend one of United Way's Leadership Chair Training sessions and invite your team to attend a Leadership Giving Best Practices Workshop. Or, schedule a convenient time for your team to meet and United Way staff partner will deliver an abbreviated training session at your workplace.

Step 3: Develop a plan

- Invite your United Way staff partner to meet with you and your team to review your organization's leadership giving history, its potential, best practices and to help develop your leadership campaign plan.
- Review the Leadership list provided by United Way to establish current employees.
- Identify prospective donors by salary range, title, organizational level, etc. Provide prospect information to your ECC early in the planning phase so United Way can produce personalized pledge forms and Leadership packages.
- Set goals for the Leadership Giving Campaign on dollar amount and number of Leadership givers.

Step 4: Schedule the Leadership Campaign

- Schedule your organization's Leadership Giving Campaign one to two weeks prior to the kick-off of your general campaign. By announcing the results early, Leadership donors can set the tone for the rest of your employees, encouraging and inspiring others to give.
- Determine the best way to make the ask in your organization:
- Host a Leadership Giving event in a special location such as a hotel or a unique location at your organization.
- Conduct a briefing at an existing meeting.
- Visit with Leadership donors one-on-one.

Step 5: Make the ask

- The ask is the most important part of the Leadership Giving campaign. Whether the presentation is a special event or during an existing meeting, consider including the following:
- Ask the CEO to endorse the campaign.
- Invite a United Way Leadership Presenter to speak about the impact of a Leadership gift. United Way has a group of prominent business and community leaders who volunteer their time to talk to your employees about United Way.
- Canvass each Leadership donor and prospective donor in person, one-on-one. Ask for 100% return of pledge forms, whether or not people make a gift. This will help you later with your re-canvass strategy.

Step 6: Follow up with Leadership donors

- Develop a tracking system to monitor returned pledge forms.
- Follow up on any outstanding donors until the gift is secured or the donor clearly indicates he or she is not contributing. (Your Loaned or Sponsored Representative will support you in this process by providing a script for follow-up phone calls and emails.)

Step 7: Say thank you

- Donors need to feel their generosity is making a difference in our community and that their gift is appreciated.
- Thank and recognize all donors and volunteers:
 - Make personal thank you calls to all Leadership donors.
 - Write personal notes to all Leadership donors.
 - Hold a thank you reception.
 - Arrange a community partner tour for the new year.
- United Way telephones and/or emails each Leadership donor and sends a personal thank you letter or card. We also provide public recognition to donors of \$500+, unless a donor has indicated they wish to remain anonymous.

United Way Awards

United Way's Awards recognize the exceptional commitment, leadership and creativity shown by hundreds of organizations and thousands of volunteers, like you, through your participation and support in the Annual Campaign. The Awards are presented annually at our Annual Campaign Wrap-up Event.

You and your organization may qualify for one or more of these awards. The Mission Possible Awards recognize the following achievements:

- Special Promotions Host
- Highest Employee Participation – large and small organizations
- Maximum Possible Impact Awards
- Mission Possible Awards
- Employee Campaign Team of the Year
- Top In-kind Supporters
- We Believe Awards
- Corporate Leadership – Bronze, Silver, Gold, Partner and Community Builder levels
- Top 25 Workplace Campaigns
- Collaboration for Community Impact Award
- Media Partners
- Polar Cup (Canfor sawmills and worksites)

United Way encourages you to publicly display any awards that you may achieve during your United Way campaigns. It shows the community that you and your colleagues support the important work being conducted by the United Way and its partner agencies.

Campaign Tools

To convey a consistent, accurate message we encourage you to utilize United Way's campaign marketing tools. Your United Way Loaned or Sponsored Representative can assist you to select items to best serve your needs.

Employee Brochure and Pledge Form

Make sure every employee receives a United Way Employee Brochure and personalized pledge form.

Posters

Posters create awareness and reinforce United Way's message. Hang them throughout your building and incorporate them at special events and meetings. Posters contain space to add campaign dates, goals, etc.

Campaign Representative Training Guide

This informative guide enhances your Campaign Representative training. It describes the Campaign Representative's role in the Employee Campaign and offers specific advice on how to approach co-workers and encourage their support.

Displays

United Way has free-standing banners available for use during your campaigns. These displays are a great way to add dramatic impact at large group campaign events.

Thank You Cards

Don't forget to show your appreciation to donors. United Way provides thank-you cards for you to personally thank every donor.

Mid-campaign Reminder Card

Use this card to remind employees of campaign events and that the campaign is nearing its end. It is also used to encourage the return of pledge forms.

Video

Show United Way's video at employee meetings to inform and inspire everyone to support the campaign. Our campaign video is available in VHS or DVD format and on the website. It is also available in closed caption by special request through your Loaned or Sponsored Representative.

Impact Stories

Donors need to know the impact of their generosity. United Way Impact Stories provide real-life accounts of people throughout Northern BC who have benefited from a United Way-funded program or service. Download Impact Stories from www.unitedwaynbc.ca and distribute them via newsletter, intranet, email, as desk drops or in paycheques.

Other Communication Tools

Check out the Campaign Toolkit on www.unitedwaynbc.ca under Campaign/ Campaign Toolkit for other communication resources, such as sample letters, information sheets, etc.

United Way resources available to support you:

- Resource Development Coordinators (RDC) - United Way staff who work with Loaned or Sponsored Representatives and Workplace Campaign Teams to facilitate all employee and corporate campaigns within an industry or division.
- Loaned or Sponsored Representatives - These people act as extensions of United Way staff during the campaign, assisting ECCs. A Loaned or Sponsored Representative is assigned to assist you with your campaign.
- Leadership Presenters - Leaders in the community who give presentations in your workplace about giving at the Leadership level (\$1,000+). Leadership Presenters can be booked through your Loaned or Sponsored Representative.
- United Way representatives who make workplace presentations to share the impact of United Way's investment in our community.

Creating Awareness

Looking for ways to bring your campaign to life? Try incorporating a variety of promotional strategies to generate excitement and get employees involved. Increased awareness can have a tremendous effect on your campaign's success.

Themes

Many organizations create a new theme for each year's United Way Employee Campaign to make it more participatory and fun. Themes are a great way to tie your campaign activities together. Be sure your theme reinforces rather than competes with the look, feel and message of United Way.

Ideas from previous campaigns:

- Super hero theme – Real Heroes Work Here!
- Be a Lifesaver – give to United Way (hand out Lifesavers with pledge forms)
- The Dream Team – Making Dreams Come True
- If I could Change the World
- A Little Help from My Friends
- Mission Possible – Use the Mission Impossible theme song
- Reality TV shows like American Idol and Survivor also offer some great ideas

Incentives

Offer Early Bird incentive prizes for pledge forms returned by a specified deadline. Consider approaching customers or suppliers for prizes.

Following are ideas for raffle and contest prizes:

- Vacation day(s)
- Gourmet lunches delivered to work
- Professional spa services
- Extended lunch breaks
- Coveted parking spots
- Lunch with the CEO
- Restaurant or mall gift certificates
- Tickets to movies, sporting or cultural events
- Company merchandise
- Donations from your organization's vendors
- Complimentary cafeteria lunches

Special Events

It's all about timing!

An ideal campaign has one or two events to create enthusiasm and build momentum. These may include a kick-off, early bird draw, and a final draw. They should not take away from the employee pledges and are best scheduled after the pledge forms have been distributed. To help with your special events, United Way has supplies available through your Loaned or Sponsored Representative, e.g. banners and aprons.

Special Events should be:

- Limited in number - Special events can be time consuming for you and your committee members. And, they often result in low returns on participation. Having fewer, more exciting events is always a better choice.
- Fun and free - Employees do not wish to be asked to donate repeatedly throughout the campaign. Events that cost money, e.g. silent auctions should always be held at the end of your campaign.
- Awareness builders - The best special events help raise awareness about United Way and your employee campaign.

Campaign Kick-Off

This is your opportunity to inform and inspire your employees with a presentation from United Way. It's also a great chance to announce your goal and unveil your goal thermometer.

Your kick-off should include:

- CEO and management team
 - Labour Representative
 - ECC & Committee
 - Leadership Chair
 - United Way Representative
 - All staff
-
- Presentations should include:
 - United Way video
 - Speaker
 - Leadership message

Special Event Ideas

Casual Day with "I'm dressed this way for United Way" stickers

These stickers are available through United Way. You can also make it a costume day. Only employees who have purchased a sticker or returned their pledge form can participate. We ask that you not refer to this day as "Jeans Day", which is a specific fundraising event for BC's Children's Hospital.

Competition/Challenge

A competition based on increases in participation, or dollars or even the first group to turn in all pledge forms can be conducted between departments, floors or locations within your organization. You could also challenge another organization within your industry/sector/office building.

CEO Challenge

Your CEO/senior management commits to doing something unconventional (sing karaoke or dress in costume), if a stretch participation or dollar goal is achieved.

Junkyard Wars

With Tonka Toys as the “junk,” teams create a working vehicle. This game builds awareness of United Way, as teams must answer tough United Way questions to get parts for the grand finale construction event. The Internet is a great source of ideas for this type of challenge.

Collecting Points

Teams compete by collecting points for completing desired behavior weighted by importance. These behaviours or tasks could include the following: turning in a pledge form, attending kick-off, campaign events, or answering knowledge testing United Way questions.

Relay

Childhood games in a timed, relay format are fun and can be a great team builder, e.g. bobbing for apples, potato sack races, suitcase/dressup relay. Involve all levels of the organization.

Hidden Talents Show

Employees perform silly, hidden talents, e.g. drinking water while standing on head, reciting the alphabet backwards and impersonation.

Bake Sale

Employees contribute baked goods to be sold at work.

Live or Silent Auctions

Auctions can be great fun. Dollars raised through auctions are not tax receiptable. Some examples of items:

- homemade cookies or cheesecake
- restaurant gift certificates
- services gift certificates (e.g. car wash by co-worker)

Chili Cook-off

Employees donate money in order to sample and cast votes for their favourite.

Others Ideas

- Email Bingo or Quiz - A great way to increase awareness about United Way and your Employee Campaign. Contact your United Way Loaned or Sponsored Representative for details.
- Pancake Breakfast or Barbeque - Make this part of your kick-off. Invite senior executives to help serve pancakes that day.
- Mini Golf - Turn your workplace into a putting green. Ticket to play is a pledge form.
- Scavenger Hunt - Create a scavenger hunt around the programs funded by United Way to help your employees become familiar with the services they are supporting.

Visit Campaign Toolkit at www.unitedwaynbc.ca for more great ideas!

Analysis and Planning Tools

Review Previous Campaign Questions

Answers to these questions can be obtained from your previous ECC, files or your Loaned or Sponsored Representative. Anytime you answer "no" to a question is an opportunity to grow your campaign.

Corporate

Was there a corporate match? Yes No

If yes, what was the formula? _____

Leadership

(Obtain list of previous donors from Loaned or Sponsored Representative)

How many Heroes \$365 to \$999 have left the organization? _____

How many Leadership donors \$1,000+ have left the organization? _____

Was there a Leadership presentation targeted to these individuals? Yes No

How many attended the Leadership presentation? _____

Campaign Team Committee

How many committee members were there? _____

Were there enough committee members? Yes No

What positions were missing? _____

Did ECC/committee members attend United Way orientation? Yes No

Was there a Leadership Chair or Champion? Yes No

Was there a Leadership Giving Team? Yes No

Were there enough Leadership committee members? Yes No

Did he/she attend a Leadership Giving orientation? Yes No

Who processed pledge forms/donations? _____

Was there a joint union/management campaign committee? Yes No

Campaign Representatives

How many Campaign Representatives were recruited? _____

(Obtain list of individuals from previous ECC.)

Campaign Representatives (continued...)

What was the ratio of Campaign Representatives to employees? _____

Was this enough? Yes No

Were pledge forms distributed personally by Campaign Representatives in all departments? Yes No

Was there an orientation for Campaign Representatives? Yes No

Campaign Details

How long was your campaign? _____

(Include dates) _____

How did you kick-off your campaign? _____

How did pledge forms get distributed? _____

Did you have an Early Bird Draw? Yes No

(If yes, include date) _____

What was the theme? _____

Was there a United Way representative/community speaker at your kick-off? Yes No

How many employees attended kick-off? _____

Was there a retirees program? Yes No

Was there a new hires program? Yes No

How was the campaign publicized? _____

Was there a mid-campaign update held with the committee and United Way? Yes No

(if yes, include date) _____

Was there a final pledge draw? Yes No

(If yes, include date) _____

Was there a campaign thank you/wrap-up event? Yes No

(If yes, include date) _____

Were donors and volunteers thanked? Yes No

Was there adequate accountability on the impact of your gifts? Yes No

Complete SWOT Analysis

Strengths, Weaknesses, Opportunities, Threats

<p>Strengths</p> <ul style="list-style-type: none"> • Kick-off speaker video got staff excited about the impact of their gifts last year. • • 	<p>Opportunities</p> <ul style="list-style-type: none"> • New group of employees from recent acquisition could be approached by a department representative. • •
<p>Weaknesses</p> <ul style="list-style-type: none"> • Not enough Campaign Representatives to follow up personally with all staff. • • 	<p>Threats</p> <ul style="list-style-type: none"> • Restructuring may impact campaign results. • •

Develop Your Strategy

Strategy	Tactic	When?	By Whom?
Labour	Solicit a union representative for the committee.	One month pre-campaign	ECC/Union Executive
Leadership	Build a Leadership Team to make personal asks and follow up.	Two weeks pre-campaign	Leadership Chair
Participation	Recruit Campaign Representatives from all levels of your organization and schedule an orientation.	Two weeks pre-campaign	Campaign Representative Coordinator
United Way \$	Invite United Way to deliver a presentation at an all staff meeting.	Day One of Campaign	ECC

Refer to your SWOT Analysis when identifying objectives, strategies and tactics for your campaign. Remember, no plan is complete without assigning ownership and setting a timeline. This page will get you started on your campaign calendar.

Establish Your Timetable

The best results come from a short, goal-oriented campaign. A one, two or three week time frame is ideal. The timetable identifies tasks, start and finish dates and people responsible.

United Way kicks off campaign in September and wraps up in November. This is the best time for your campaign since Loaned or Sponsored Representatives are available to assist you.

Start with the **end date** in mind and use this reverse schedule to fill your calendars. Plug these dates into your calendar on the next page.

	Task/Objective	Date	Responsibility
	Campaign Evaluation		
	Wrap-Up Event		
	Final Pledge Form Draw		
	Mid-Campaign Meeting		
	Early Bird Draw		
	Campaign Kick-off		
	Leadership Presentation		
	Pledge Form Production		
	First Committee Meeting		
	Leadership Chair Orientation		
	Campaign Representative Orientation		
	Committee Orientation		
	First Meeting with Loaned or Sponsored Representative		
	Campaign Orientation Session (ECC)		

Sample One-Week Campaign Calendar

Sun	Mon	Tue	Wed	Thu	Fri	Sat
			ECC & Leadership Chair attend Campaign Training Workshop			
PRE-CAMPAIGN	12:00 noon Campaign Rep Orientation In-house training facilitated by United Way					
			Leadership Presentation Held one week prior to Kick-off to “set the pace” and build momentum.		“Pay Day”	
CAMPAIGN		9:00 am Kick-off Day Shift 6:00 pm Kick-off Night shift	Early Bird Draw	Mid-Campaign Update Meeting	Casual Day Free for all donors. Reminders Distributed and Follow Up by Campaign Reps	
Free Awareness Event Must return pledge card to be eligible						
Campaign Representatives personally deliver pledge packages and speak with each employee.						
		Final Draw @ 4:00 pm	Wrap-Up Event With announcements and thank you.	POST-CAMPAIGN	IMPORTANT Submit pledge cards and cash to United Way. Don't forget required copies to your payroll department.	
	Campaign Evaluation Debrief with campaign committee and Loaned Rep.					

Kick-offs are best scheduled for Tuesday, Wednesday or Thursday to attract as many employees as possible and so as not interfere with flex days.

Set Your Goals

Use the three-year financial summary provided by United Way to complete this worksheet.

Example Formula for increasing the number of donors:

$$\frac{\text{Current \# of Employees}}{\text{Participation Goal}} \times \frac{\text{Participation Goal}}{\text{Donor Goal}} \% = \text{Donor Goal}$$

Use the following table to help you record your goals:

		Previous Results	Goals
GOALS	Participation	%	%
	Overall \$s	\$	\$
	United Way \$s	\$	\$
LEADERSHIP	Total Leadership Donors	#	#
	Total Leadership \$s	\$	\$
	Recovered Leadership Donors	#	#
SES	Special Events	\$	\$

Example of other Formulae to suit your goal setting needs:

- Average Gift = total \$ raised / # of donors
- % Participation = # donors / # employees x 100
- % United Way \$ = United Way \$ total / total \$ raised x 100

The 20-Minute Kick-off Meeting

Group Kick-off presentations are the most effective and efficient way to reach all employees and to help them understand the work of United Way and how their contributions impact the community. It takes as little as 20 minutes to convey key messages to your group, present a Leadership Presenter or Community Speaker or show a United Way video. Be sure to ask employees to give when they receive their pledge forms.

Please call your United Way staff partner or Loaned or Sponsored Representative to arrange for a Community Partner speaker or Leadership Presenter to attend your meeting. Remember, people give to people, so don't overlook this critical step. Consider asking a fellow employee to speak about his/her own experiences as a recipient of United Way-funded services.

Sample Agenda	Responsibility	Time Allotted
1. Opening Remarks - ECC <ul style="list-style-type: none">• Thank participants for coming and launch campaign.		
2. CEO and union endorsement <ul style="list-style-type: none">• Corporate commitment to United Way• Management and union support for the campaign• Request each employee to support the campaign and to consider giving at the Leadership level• Introduction of Community Speaker or Leadership Presenter		
3. Leadership Presenter or Community Speaker		
4. United Way Overview - United Way staff partner/Loaned or Sponsored Representative		
5. Campaign Video		
6. Closing Comments <ul style="list-style-type: none">• Thank speakers• Thank participants for attending• Remind employees of special dates (early bird draws, barbecues, etc.)		

Mid-Campaign Update

To be completed by ECC, Campaign Committee and Loaned or Sponsored Representative.

Date: _____

Company Name: _____

Campaign Dates: _____

ECC Name: _____

Early Bird Draw: _____

Loaned or Sponsored Representative Name: _____

		Previous Results	Goal	Progress to Date	% Progress (= Progress/Goal x 100)
LEADERSHIP	Participation	%	%	# Donors ____ / # Employees ____ x 100 = _____ %	
	Overall \$'s	\$	\$	\$	\$
	United Way \$'s	\$	\$	\$	\$
GOALS	Total Leadership Donors	#	#	#	#
	Total Leadership \$'s	\$	\$	\$	\$
	Recovered Leadership Donors	#	#	#	#
SES	Special Events	\$	\$	\$	\$

Review these questions and identify opportunities to follow up.

Participation

- Has your Campaign Representative team followed up personally with each employee? Yes No
- Have you approached people working from home, away on vacation, at another site or working another shift? Yes No
- What have you done to create awareness about the campaign and United Way's role in the community?
(Invite a speaker. Send email/voice mail with United Way facts, etc.)

Leadership

- Have all past and potential Leadership Donors been approached? Yes No
- Have you received a pledge form from every past and potential Leadership Donor? Yes No

Dollars Raised

- What outstanding questions or lingering concerns need to be addressed?

- Have you communicated the value of a per pay gift? Yes No

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