



United Way
Alberta Northwest

**2023 Employee Campaign
Coordinator Guide (ECC)
Training Guide**



United Way
Alberta Northwest

WHY DO I GIVE TO UNITED WAY?

With United Way, it is not about supporting one cause. In fact, it is something far more profound. Each and every contribution becomes part of a major community-building effort that works to achieve an inspiring vision. United Way Alberta Northwest envisions a resilient and caring community where everyone thrives. A future where all neighbourhoods are safe and residents have a sense of well-being, both financial and mental freedom.

"I donate because 1 in 3 people use services funded by the United Way."

- Fletcher Bootle,
Past Board Member

"I have always believed in helping the community where we live. Together we are all responsible to improve our lives and the lives of others. United Way ensures our donations are used for the most impact to help those most in need."

Gordon Provencher

United Way mobilizes partners across the region to deliver strategic local programs that work together to address the root causes of poverty and create lasting change. It is why, with United Way, donations and support go farther and wider than any other charitable investment a community member can make. That's what a shared vision is about and what it takes to be the change we all want to see in our community.

To accomplish those goals, the United Way depends on volunteers like you to ensure we have a successful campaign. We know the best campaigns are run with open and honest dialogue and hope you will never hesitate to bring any concerns or questions forward for discussion. We want you to reflect on this time as a truly great experience.



Giving Opportunities

Employee Giving

Now more than ever, your employee giving program will be the central focus of your campaign. United Way will provide giving options that work best for your work environment. Consider the following options:

- E-Pledge
- Fillable PDF Pledge Form
- Paper Pledge Form
- Perpetual/Continuous Giving
- Gifts of Securities

Tax Benefits

- Annual donations totaling above \$200 will result in tax credits of up to 50%
- Donations are eligible to be carried forward up to 5 years if they can't be used in the current tax year

Planned Giving

- Donations can be included in your will and provide tax advantages within your estate plan
- Charities can be beneficiaries of life insurance policies; special life insurance products such as Canada Life's My Par Gift, can be used to multiply a donation's amount/impact over time

Corporate Match / Corporate Donation

Companies that participate in corporate matching help their staff feel more engaged with their employer. Corporate matching creates a visible philanthropic profile for your business in our community through the United Way.

Giving Opportunities

Payroll Deductions

Payroll deductions are the easiest way for employees to participate. Employees choose the amount and frequency. The donated amount is added to their T4, so there is no need to issue or track receipts.

Workplace Campaigns

Workplace events can be a one-time, annually, or ongoing through the year. Your UW can help you plan the perfect event; with low commitment, they are an easy way to work as a team while still contributing to our community!

Volunteer

Every day, volunteers across our region come together to make a lasting difference in our communities by contributing their time, expertise, and talents. Volunteers are crucial to our operations and we wouldn't be able to inspire change without you.



Thank you for volunteering with United Way Alberta Northwest!

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, ECC's ensure that 100% of employees are...

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

INFORMED

INSPIRED

APPROACHED

THANKED

Key Responsibilities

- Meet with your local United Way
- Recruit a campaign committee and ambassadors
- Communicate with management 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

We are here to help!

Leading a United Way workplace campaign can seem overwhelming - but we are here to help. Call Tracy Zuk at 780-532-1105 or director@unitedwayabnw.org



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**
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 780-532-1105.
- 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!



Set key goals that drive friendly competition and results!

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

Simply, a Leaders of the Way campaign focuses on gifts of \$1,200 or more. Leadership donors are a critical component of any campaign. Talk to your United Way about strategies to maintain your current leaders and encouraging potential leaders to join.

Kick Off your Campaign!

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

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 the 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, contact your United Way. It is okay not to know!



»» Call on Coworkers 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 deductions. Emphasize how their gift can be spread over 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.

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 will 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



**THANK
YOU!**

Hold a Mid-Campaign Update Meeting

Schedule a mid-campaign update meeting with your committee and your United Way. 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; creating action steps to ensure your team reaches 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.

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.

Running your Leaders of the Way Campaign (\$1200+)

With a donation of \$1,200 or more, our Leadership level donors are ready to drive change, willing to set a powerful example and become part of the solution to our community's complex social issues. United Way leaders are passionate about leaving their mark on Northwestern Alberta by creating lasting change.

» Recruit a Leadership Team

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

» 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)

» Drive Leadership Activity and Messaging

- Host a leadership event before your campaign kick-off to build momentum

» Ask your Leaders to Give

- Make your ask pre-campaign right after your leadership event or kick-off



Special Events

Special events can be great ways to 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
- Fun and free to attend
- Food Safe

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.



Gaming Licenses

United Way allows approved workplace campaign events to be licensed under United Way's charity status with Alberta Gaming, Liquor and Cannabis (AGLC). Your United Way would happily help you with any licenses required for your special event.

- 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

Put the FUN in Fundraising!

Fundraising doesn't have to be mundane or lackluster; in fact, infusing some fun into the process can lead to increased participation, higher engagement, and a greater impact on your end goal!

Theme it Up

Kick off your workplace fundraising campaign with a captivating theme that resonates with your team; a fantastic opportunity for creativity and give participants a chance to embrace their imagination. From "Superheroes for Change" to "Decades Dance Party," the possibilities are endless. Incorporate the theme into promotional materials, dress codes, and activities throughout the campaign to keep the momentum going.

Friendly Competitions

Encourage participants to compete for various titles, like "Top Fundraiser," "Most Creative Team," or "Biggest Impact." Celebrate the winners with fun rewards or recognition to motivate others to join in and strive for greatness.



Gamify Giving

Who says fundraising can't be a game? Turn the act of giving into an interactive experience by gamifying the process. Create donation challenges with different reward levels, such as unlocking exclusive company swag or special office privileges. Implement progress bars or charts to showcase how close the team is to reaching specific fundraising milestones.

Taste of Success

Food fundraisers are an age-old tradition that brings people together for a common cause while delighting their taste buds. From classic bake sales and chili cook-offs to potluck lunches and more, these events not only raise much-needed funds for the United Way but also foster a sense of camaraderie and community spirit.

First Committee Meeting Agenda Checklist

Looking back and planning forward

Here is a checklist of items you can use when planning your first committee meeting to help set you up for success in your upcoming campaign.

Previous Campaign Details

- Campaign dates
- Overall theme
- What kind of campaign did you have – in-person, virtual, hybrid?
- Pledge forms – ePledge, online, paper?
- Kick-off event
- Wrap-up event
- Special events
- Speakers – general, leadership
- Attendance at events
- Volunteering
- Communications plan
- Number of committee members; was it enough? Too many?
- Amounts raised the previous year:
- Pledges, special events, corporate gift or match
- Total funds raised?
- Funds that went to United Way?
- # of employees; participation rate (# of employees/# of donors)
- # of leadership donors (\$1200 and above)

The Team

- Positions needed; Leadership donors lead, events lead?
- Was management and union representation on the company leadership team?
- Did the ECC lead the pledge collections/processing?
- Do you have enough campaign representatives for follow up (recommend one for every 10-20 employees)

Events and Pledges

- What kind of kick-off would you like to have?
- What kind of special event or activities would you like to hold this year?
- Prizes for early bird, leadership giving, end of campaign draws
- How were donors thanked?

Setting your Campaign Goals

- Has your number of employees gone up or down?
- How many donors (leadership and otherwise) have moved on from your workplace?
- How is the company doing financially?
- What is the state of your industry?
- Setting participation rate; Multiply current # of staff x last year's participation rate = goal for # of doors.
- Setting fundraising goal: Multiply Last year's total funds raised x 10% and add together

Appendix A

Recommended Kick-Off Agenda

We welcome you to make use of the following template agenda as you plan your event.

<p>Opening - 5 min Time: XXX am/pm CEO/ECC/Sr. Management</p>	<ul style="list-style-type: none">• Welcome• Value of UW & Company partnership• Importance of United Way• Encourage all to get involved with campaign activities• Interactive poll or quiz to get people get engaged
<p>United Way Awareness Activity - 12 min Facilitated by United Way Alberta Northwest</p>	<p>Activity examples:</p> <ul style="list-style-type: none">• Makethemonthgp.ca - online poverty simulation• UW & Company quiz• Group whiteboard sharing (Why I care about community)• UW videos• Speaker from UW
<p>Closing remarks - 5 min CEO/ECC/Sr. Management</p>	<p>CEO/ECC to thank participants, and reiterate importance of United Way</p> <ul style="list-style-type: none">• Call to action/donate now• Share company fundraising/participation goals• How to give• Instructions on next steps - donation link sharing, who to contact with questions, etc.



Appendix B

Speaking Notes

The below can be customized/personalized to meet the needs of the speaker(s) at your kick-off event.

Opening remarks

- Welcome attendees and thank them for joining the call. My Name is..... Before we begin, I would like to welcome two very important guests who are with us this morning (introduce UW and UW Speaker).
- As many of you know, I am a strong believer of United Way's work, and I am proud to be a part of <COMPANY'S> United Way Alberta Northwest's Campaign.
- We have seen demand for community services skyrocket since the beginning of the pandemic. The need for access to food, mental health counselling, and employment support has increased by nearly 45%.
- What inspires me is how we have all pulled together and looked to how we can help during and post the pandemic. Everyone is stepping up and doing what they can to help to ensure no one falls through the cracks.
- But now we must look to the future, and what our role will be in our long-term community recovery. These issues we have seen in the last few months (food access, seniors' isolation, job security) are not new and will continue to need to be addressed long after we settle into our new normal.
- That is why we partner with United Way; they have been on the front line of addressing these issues. They provide a vital continuum of care for people and families who need support.
- I want to take a moment to recognize and thank each and every one of you in this room for stepping up to support United Way every year. Our collective commitment demonstrates <COMPANY'S> leadership in communities across Northwestern Alberta, raising over X\$ for United Way.
- IF THE SPEAKER HAS A PERSONAL STORY ABOUT UNITED WAY OR SOMETHING THEY HAVE EXPERIENCED, ADD HERE
- Thank you again for your personal leadership and generous support of United Way.
- Introduce the next section of the event (e.g., audience poll, speaker, UW activity) and turn over to the activity facilitator

Appendix B

Closing Remarks

- Thank you, **<GUEST SPEAKER>**, for joining us today and speaking. United Way plays such an important role in our community, investing in a critical social safety net throughout the Northwestern Alberta. This vision ensures we are lifting our region up and that regardless of background and circumstance – everyone can thrive.
- Our annual United Way campaign starts on **<DATE>**. We have an amazing team that has worked hard to make this year's campaign even better. Thank you, **<CAMPAIGN VOLUNTEERS>** for your leadership in the campaign.
- By now, a donation link should be in your inbox. I encourage you to make a gift now. Let's demonstrate our commitment to our staff before we officially launch the campaign on the **<DATE>**
Optional if there is a multiple kick off situation and you send out link early
- Our firm's donations to United Way Alberta Northwest are part of how we are building a stronger community and creating a legacy across our communities.
- Thanks everyone.

Appendix C

Sample Campaign Timelines

Plan your Campaign Calendar

United Way campaigns generally take place over 1-2 weeks but can be whatever length is best for your workplace. Always make sure you have a great campaign kick-off! Check out our sample timelines.

Sample Timeline: 1 week			
Pre-campaign	Analysis and planning ECC and Committee training Launch emails for staff	Day 5	Mid-campaign review Report results to your United Way Staff Partner
Day 1	Kick-off event & United Way presentation		Reminder email to staff
Days 2-3	Committee reaches out to staff	Day 6	Follow up with staff
Day 4	Early Bird Donor Draw Special event	Day 7	Wrap Up Event

Sample Timeline: 2 weeks			
Pre-campaign	Analysis and planning ECC and Committee training Launch emails for staff	Day 7	Mid-campaign review Report results to your United Way Staff Partner
Day 1	Kick-off event & United Way Presentation	Days 8-12	Special events Follow up with staff (in person or via email)
Days 2-5	Committee reaches out to staff	Day 13	Draw for new donors and those who increase by 15%
Day 6	Early Bird Donor Draw	Day 14	Wrap event

Sample Timeline: 3 weeks			
Pre-campaign	Analysis and planning ECC and Committee training Launch emails for staff	Days 12-17	Special events Follow up with staff (in person or via email)
Day 1	Kick-off event & United Way presentation	Day 18	Draw for new donors and those who increase by 15% (or a percentage of your choice)
Days 2-5 Days 6-10	Committee reaches out to staff Early Bird Donor Draw Special event	Day 21	Wrap event
Day 11	Mid-campaign review Report results to your United Way Staff Partner		

Making a Difference Together

We have strategies and resources to help you have a successful campaign. Please reach out to us for information and guidance on how you can help your employees make an impact in their community.

Learn more about the different ways you can make a positive impact on your business and your community. Contact Tracy to get started.

Tracy Zuk, Executive Director, United Way Alberta Northwest



United Way
Alberta Northwest

Tracy Zuk

Executive Director

Director@Unitedwayabnw.org

Phone: 780-532-1105

Cell: 780-831-8242

Unitedwayabnw.org



United Way
Alberta Northwest

unitedwayabnw.org