

# Give. Volunteer. Act.

## **Workplace Campaign Toolkit** **Employee Campaign Coordinator Manual**

### **Tips, Tools, Techniques**



**United Way**  
Prince Edward Island

# United Way of Prince Edward Island

## Why United Way of PEI?

The United Way of PEI is committed to the advancement of the Island community. Our mandate is to bring resources together to support local non-profits, help them fund local projects, work with them to build sector strength and to collaborate with local leaders and stakeholders to address the pressing needs of Islanders.

Since 1962 the United Way has been improving lives and building stronger communities across PEI working with stakeholders, partners, volunteers and donors. We are a registered charitable public foundation governed by a volunteer Board of Directors, with a small staff and many volunteers.

The strength of our operation and the success of our strategy rely on the generosity and commitment of our donors and volunteers who partner with us to help advance people from poverty to possibility, enable kids to be all they can be and to foster healthy, strong communities in our province.

## Why give to the United Way?

**It's efficient** - It's a great way to streamline all of your donations through one process. In addition to helping donors support countless local charities, the UWPEI is currently supporting 17 programs through 13 agencies across Prince Edward Island.

**It's effective:** The United Way is committed to investing in programs and organizations that deliver outcomes and address pressing community priorities.

**It's painless:** The corporation deducts the pledge from payroll and issues a cheque to the United Way of PEI.

**It's simple:** No need to keep track of multiple receipts, charitable giving is recorded on the employee's T4.



# United Way of Prince Edward Island

All the money raised by the United Way of PEI stays on PEI. We work closely with the experts in the non-profit sector, government departments, volunteers and donors to make sure we are connected to the issues and investing your donation where it will have the greatest impact.

## From poverty to possibility

- Moving people out of poverty
- Meeting basic human needs (Ex: food, shelter, and jobs)

Donors and volunteers are the foundation of our organization and by working together we are able to help Islanders move from poverty to possibility, help kids be all they can be and build stronger, healthier communities across the province.

## All that kids can be

- Improving access to early childhood learning and development programs
- Helping kids do well at school and complete high school
- Making the healthy transition into adulthood and post-secondary education



## Healthy people, strong communities

- Improving access to social and health-related support services
- Supporting resident and community engagement
- Supporting community integration and settlement



# Workplace Campaigns

Every year, hundreds of employees get involved in workplace giving campaigns to support the United Way of PEI. The United Way workplace campaign unites employees in all offices or branches of a company, and gives them an opportunity to donate, volunteer and advocate.

Workplace campaigns are integral to the success of the United Way of PEI with over 60% of its annual revenue coming from employers and employees. But the workplace campaign is about more than raising money for worthy causes; it also strengthens connections between employees, employers and their community.

And... United Way makes it easy—with staff support, customizable materials, online pledging options, and exciting ideas for employee participation. As a business leader, you can rest assured knowing that gifts to the United Way Campaign are invested carefully by a network of experienced volunteers, in programs that find solutions to our community's most pressing problems enable kids to be all they can be, move people from poverty and build healthy, strong communities.



# Your role as Employee Campaign Chair

Workplace charitable campaigns need a champion!

The Employee Campaign Chair (ECC) is typically appointed by the organization to lead an effective workplace campaign through the solicitation of employee support for the United Way.

There are many benefits that come with the role of ECC.

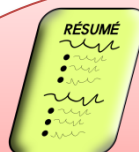
You will...

- ✓ receive recognition as a leader in your organization,
- ✓ develop project management skills,
- ✓ cultivate team building skills,
- ✓ represent your organization at United Way functions,
- ✓ know that you are making a personal investment in your community.

# 12%

2015/16  
FUNDRAISING

We keep our costs to a minimum... well below Canada Revenue Agency's threshold for non-profit's ratio of costs to revenue. Based on our audited financial statements, our cost of fundraising is 12%.



**Don't forget to include your United Way volunteer work on your résumé.**

# Workplace Campaign Success

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

## Best practices for a successful campaign

1	<b>Meet with your United Way Representative</b>	Hold a meeting with your United Way Representative well in advance of your campaign to begin discussing the approach to your campaign.
2	<b>Senior management support</b>	Invite senior leadership to be a visible part of your campaign.
3	<b>Discover the United Way of PEI</b>	Learn about the United Way in your community.
4	<b>Recruit your committee</b>	Build a committee of volunteers who represent your organization and who are committed to success.
5	<b>Set goals and develop strategies</b>	Set realistic, achievable and challenging goals.
6	<b>Plan your approach</b>	Set campaign dates, recruit and train ambassadors to canvass. Plan pledge package distribution and schedule employee presentations.
7	<b>Educate employees and promote campaign</b>	Plan special events and use tools such as website, posters, and thermometers to educate employees and boost engagement.
8	<b>Establish monitoring and reports</b>	Communicate results regularly with your committed, employees, leadership and UWPEI.
9	<b>Thank volunteers and celebrate success</b>	Acknowledge committee members volunteers and donors. Celebrate success with your entire organization.
10	<b>Evaluate your campaign</b>	Wrap-up your campaign by reviewing all activities and related results. Document your recommendation to improve next year's campaign.

# Your role as Employee Campaign Chair

Call 902-894-8202 or email [inquiries@peiunitedway.com](mailto:inquiries@peiunitedway.com) to speak to a United Way representative

## 1. Meet with your United Way representative

United Way staff is available to support you throughout the year as you lead your workplace campaign. They can provide the following support:

- ✓ Planning
  - Assist in the development of your campaign plan
  - Include results and history from previous campaigns in your workplace
  - Connect you with campaign volunteers in similar organizations for best practice sharing
  - Serve as a committee member
  - Lead a training session for your committee and canvassers
- ✓ Execution
  - Arrange for speakers and/or presentations in your workplace during kick-off or staff meetings
  - Attend campaign events
  - Help address any questions that arise
  - Assist in the collection of funds and appropriate follow-up strategies
- ✓ Debrief
  - Facilitate a session to evaluate campaign successes and brainstorm ideas for future campaigns
  - Follow-up with outstanding donors (retirees, maternity/paternity leaves, etc.)
  - Collect any remaining pledges that come in after campaign close

## 2. Senior management support

The support of senior management in your organization is critical to the success of your campaign.

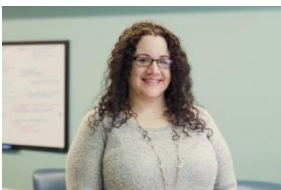
- ✓ Ask appropriate senior leader(s) to assist and support the campaign by:
  - Encouraging employee giving and leading by example.
  - Communicating and supporting campaign goals, strategies and plans.
  - Approving the employee time necessary to plan and implement the campaign (i.e. time to attend meetings, training and other campaign activities)
  - Authorizing a budget to operate your campaign if required
  - Attending and/or speaking at campaign events
  - Encouraging the Leadership Giving Program

# Your role as Employee Campaign Chair

## 3. Discover the United Way of PEI

The United Way of PEI works with Islanders *for* Islanders. Through partnerships with local community charitable organizations, our goal is to create a province in which everyone can enjoy a dignified and healthy lifestyle. When you give to the United Way of PEI you are helping fund programs in Island communities that are focused on changing lives and creating a lasting impact. Our organization relies on donors and volunteers who help us build financial and organizational resources to provide support, build sector strength and mobilize community action.

To discover more about our work, visit [www.peiunitedway.com](http://www.peiunitedway.com) and follow us on Facebook, Twitter, Instagram and LinkedIn.



Ask your United Way representative about Speakers' Bureau, a program that provides United Way workplace campaigns with inspiring and informative speakers who can help share the United Way message.



# Your role as Employee Campaign Chair

## 4. Recruit your committee

Planning a United Way campaign should be a positive, rewarding experience.

- ✓ Review last year's operation, including the structure and gather feedback from members.
  - The goal is to have all members involved and contributing, without feeling overworked or underused.
- ✓ Form a committee with a blend of new and returning members to encourage new ideas, while maintaining continuity.
- ✓ Approach individuals with the specific skills and expertise. Your committee will need to ensure the effectiveness of your team.
- ✓ Consider the size and structure of your organization when building your committee.
  - In workplaces with a large employee base, the committee can be comprised of several members, each with specialized roles.
  - For smaller workplaces fewer members may be needed, each assuming multiple roles.
  - Involvement from staff across your organization will ensure that employees from every department feel part of your campaign and help to promote it.
  - Your committee members should be enthusiastic, hardworking and committed to the success of your campaign.

Make sure committee members know what is expected of them and have ownership over their responsibilities. Here are some examples of roles you may wish to include in your committee:

### Leadership Giving Coordinator

- Coordinates leadership giving in the campaign
- Recruits leadership canvassers
- Canvasses leadership donors
- Arranges leadership presentations
- Thanks leadership donors

### Special Event Coordinator

- Plans kick-off & wrap-up
- Coordinates volunteers to organize events that educate employees and build employee engagement

### Canvasser Coordinator

- Determines # of canvassers required and recruits one to canvass in each department/location
- Arranges training for canvassers
- Monitors and reports progress

### Communications / Marketing

- Develops campaign promotion and publicity
- Plans and coordinates year-round United Way communications
- Publicizes results regularly

Remember to have fun with your committee!

Other positions to consider are coordinators for:

- New employees
- Young professionals
- Retirees



# Your role as Employee Campaign Chair

## 5. Set goals and develop strategies

Review the results of past campaigns with particular attention to the previous year's campaign to identify campaign strengths and opportunities. Consider these questions:

- ✓ Was the CEO/senior management involved?
- ✓ Did committee members represent every part of the organization?
- ✓ Was there a sufficient number of canvassers to canvass?
- ✓ Were committee members and canvassers trained by a United Way representative?
- ✓ Was the United Way invited to participate as part of your campaign team?
- ✓ What was your goal (participation & dollars)? Did you achieve it?
- ✓ How were the pledge forms distributed? Were they personalized?
- ✓ Was payroll deduction available?
- ✓ Were special events effective in generating fun, awareness and revenue?
- ✓ How was the campaign promoted? Did you have an employee presentation?
- ✓ Was the Leadership Giving Program promoted?
- ✓ What role did the union play (if applicable)?
- ✓ Were volunteers and donors thanked?



## Set your goal!

A goal motivates and provides a mechanism for measuring the success of your campaign. Once your analysis is complete, develop your goal.

Committee participation in goal setting will increase commitment to campaign success. Your goal should be realistic, achievable and challenging.

Once determined, it should be communicated to all employees.

***Consider setting a percent participation goal as well.***

### Suggested campaign goal formula:

$$\begin{array}{rcl} & \# \text{ Employees} & \\ X & \% \text{ Participation} & \\ X & \underline{\$ \text{ Average Gift}} & \\ = & \text{GOAL} & \end{array}$$

# Your role as Employee Campaign Chair

Develop the strategies to be employed in your campaign to help reach your goal.

## Participation

- ↑ Increase employee participation by offering more opportunities to learn about the United Way.
- ↑ Increase employee participation by encouraging “Everyday Hero” (\$365/y)
- ↑ Increase employee participation by training all canvassers.
- ↑ Increase employee participation by focusing on new hires or young professionals.
- ↑ Increase employee participation by canvassing and following up with every employees (including Retirees)

## Contribution

- ↑ Increase the average contribution by promoting Leadership Giving.
- ↑ Increase the average contribution utilizing personalized pledge forms.
- ↑ Increase the average contribution by promoting payroll deduction.

Post regular campaign updates on-line , via social media & also place progress tracking info in various office locations to encourage all employees to take ownership of the campaign goal.



# Your role as Employee Campaign Chair

## 6. Plan your approach

Planning is critical to making your campaign focused and effective. Set campaign dates, recruit and train ambassadors to canvass. Plan pledge package distribution and schedule employee presentations. The main areas to consider in your plan are:

### Timing

Develop a timeline that is appropriate for your workplace. The most successful campaigns are short, fast-paced and organized. Some of the largest campaigns are completed in one week. The longer a campaign runs the less excited and enthusiastic the staff will be about the campaign.

ONE WEEK CAMPAIGN	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY
Execute	Kick-off event United Way speaker Distribute pledge forms Leadership canvass	Canvass Early Bird Draw	Canvass Special Event	Re-canvass	Office wrap-up & submit forms.
Communicate	Promote your campaign	Update group participation challenge Update thermometer			Announce results Recognize donors & volunteers

## 7. Educate employees & promote campaign

Awareness is achieved through ongoing communications and employee presentations. Inviting United Way to present is an excellent resource for motivating employees to take part in your workplace campaign. A United Way presentation can bring your campaign to life through real stories from real people who have overcome adversity or through videos designed to inform and inspire.

For the educational component of your campaign determine:

- ✓ # of presentations needed to accommodate the total staff
- ✓ How employees will be notified of presentation dates and times
- ✓ Where presentations will be held
- ✓ Which speakers are most effective for your audience? We suggest:
  - United Way representative
  - United Way speaker or video
  - A leader in your organization (e.g. CEO, Union President, Department Head)

# Your role as Employee Campaign Chair

## 7. Educate employees & promote campaign cont'd.

For the educational component of your campaign determine:

- ✓ How to incorporate additional United Way resources (campaign video, posters, display materials and the website [www.peiunitedway.com](http://www.peiunitedway.com))
- ✓ Unique educational components such as a Day of Caring, Community Tour, and Leadership giving program
- ✓ If all communications are timely, informative and interesting



### Leadership Giving Program

The Leadership Giving Program provides recognition to individuals who give \$1000 or more to the United Way. Your workplace can run a successful Leadership Giving Program in conjunction with your campaign by:

- ✓ Promoting Leadership giving in all presentations and campaign communications
- ✓ Holding a special leadership presentation to promote leadership giving
- ✓ Recruiting a volunteer to canvass previous and potential Leaders
- ✓ Promoting gifts of Stock and Securities as an option to become a Leader
- ✓ Explaining tax credits and implications of being a Leader.

# Your role as Employee Campaign Chair

Leadership Giving Benefits	Bronze (\$1000 - \$2499)	Silver (\$2500 - \$4999)	Gold (\$5000 - \$9999)	Platinum (\$10000+)
Personal Thank You	✓	✓	✓	✓
Immediate Tax Receipt (if applicable)	✓	✓	✓	✓
Recognition on Website & Annual Report	✓	✓	✓	✓
Invitation to Annual Donor Recognition event		✓	✓	✓
Recognition at Annual Donor event			✓	✓
Personal meeting with CEO & Board President				✓



Promoting Leadership Giving in your workplace can dramatically increase your overall campaign achievement. Just a few new leaders can make a big difference!!

# Your role as Employee Campaign Chair

## The Leadership Giving program cont'd

United Way Leaders have the power to be instruments of change. By lending support to the Leadership Giving Program, donors are demonstrating their passion and commitment to make PEI great for everyone.

### Benefits of a Leadership Campaign

#### **Employee Campaign Volunteer:**

Increase your campaign achievement - a few new Leaders can have a huge impact on your overall campaign results. In many campaigns, revenue from leadership giving makes up a substantial portion of overall employee revenue.

#### **Community:**

Access to new resources – new dollars from workplace campaigns enhance United Way's ability to respond to community needs.

#### **Donors:**

Enhanced sense of community – Leadership giving provides donors with the personal satisfaction of making a significant contribution to the quality of life for people in our Island community.

## **Gifts of Stock and Securities**

*Changes to federal tax regulations make the donations of stocks and securities a very tax effective way to give. Gifts of publicly traded stocks do not incur any capital gains and a charitable tax receipt will be issued for the full value of the gift. Forms and instructions are available at [www.peiunitedway.com](http://www.peiunitedway.com).*



Contact your United Way representative for further information about giving options @ 902-894-8202.



**United Way**  
Prince Edward Island

### SHARE TRANSFER FORM GIFTS OF PUBLICLY TRADED SECURITIES TO THE UNITED WAY OF PEI

\*Please notify Deanna Carroll, Manager of Resource Development, with United Way of PEI at (902) 894-4259 or [dcarroll@peiunitedway.com](mailto:dcarroll@peiunitedway.com) PRIOR to the actual transfer of shares to ensure your transaction is handled smoothly and efficiently.

To complete the trade:

1. Contact Deanna Carroll at the United Way of PEI at [dcarroll@peiunitedway.com](mailto:dcarroll@peiunitedway.com) or 902-894-4259
2. Fax this form to the United Way of PEI at 902-894-8643.
3. Instruct your broker to initiate trade and transfer shares to United Way's account at RBC Direct Investing Account: 88758498 cheque digit 19. Contact: Ciaran Mulcahy 902-629-7489

To be completed by Donor:

Name of Donor	
Donor's Address	
Donor's Daytime Tel #	
Workplace (if applicable)	
Donor's Broker	
Broker Telephone #	
Brokerage Firm	
Name of Security	
# of Shares Transferred	
Approx. value per share \$	
Approx. total amt. donated	
Date of transfer to UWPEI	
Signature:	

United Way of Prince Edward Island  
185 Kent St., 2<sup>nd</sup> Floor, PO Box 247  
Charlottetown, PEI  
C1A 3E4

Thank you for your donation!

# Your role as Employee Campaign Chair

Suggested ratio for canvassers when canvassing is 1:15

## Pledge form

The pledge form is an important tool in your campaign. United Way will support you with pledge packages including pledge forms, donor guides and other resource materials.

## Canvassing Employees

Effective canvassing is the most important element of your campaign. Canvassers are the frontline volunteers representing United Way. They provide co-workers with an opportunity to make an informed decision about their gift and help to distribute and collect pledge forms. To plan the canvassing component of your campaign:

### RECRUIT

...a Canvasser Coordinator to build a canvassing team representative of your total workforce, and to facilitate peer- to-peer canvassing.

### TRAIN

...Canvassers by booking an orientation session with your United Way representative.

### APPROACH

...employees by choosing a method best suited to your workplace. Ensure all employees, incl. contractors, retirees, part-time & off-site workers are included and canvassed.

#### Group

A canvasser personally connects with a fellow employee. When employees are asked to contribute by a peer, it is more meaningful.

Peer canvassing is advisable at every level of the organization and is preferable where employees are spread over a large area and it is difficult to get everyone together.

#### One-One Canvass

Pledge forms are distributed following a presentation - an effective and efficient method - ensuring everyone receives the same message.

Your canvasser team still has a one-to-one role to play in these situations by encouraging employees to attend all presentations and following up with those who were not present.

#### Combination

Similar to a group canvass, a presentation is held but pledge forms are not distributed, allowing Canvassers to perform a one-to-one follow-up with each employee.

Canvassing should be done immediately following the presentation.



# Your role as Employee Campaign Chair

Investments made by individuals in the workplace make up over 60% of the dollars raised for our community through United Way each year. Canvassers have a direct impact on the success of our community campaign. To help Canvassers represent United Way, convey our appreciation and conduct an effective canvass please leverage the following guide.

Prepare	Meet	Follow-up
<p><b>BUILD:</b> Your understanding of United Way and the needs of your community</p> <p><b>LEARN:</b> The strategies / goals for your workplace campaign</p> <p><b>SCHEDULE:</b> Time to meet personally with each colleague</p>	<p><b>INSPIRE:</b> Your colleagues by telling them about your workplace campaign, the goals, opportunities to participate and why you're involved</p> <p><b>EDUCATE:</b> Your colleagues by sharing a compelling fact / story / message that helps explain the value of United Way and the impact on the community</p> <p><b>REVIEW:</b> The pledge package and review the pledge card with your colleague (if offered in your workplace, promote the convenience of payroll deduction)</p> <p><b>RESPOND:</b> To questions and offer responses (or promise to follow up with a response)</p> <p><b>ASK:</b> Ask for their involvement</p> <p><b>PROCESS:</b> Completed pledge cards or inform your colleagues of the pledge card submission process (i.e. drop box, person collecting, you will return to pick up)</p> <p><b>THANK:</b> Your colleagues for their time and/or their investment</p>	<p><b>COLLECT:</b> All outstanding pledge forms, even when employees have chosen not to invest</p> <p><b>RETURN:</b> All pledge forms, cash, and cheques to your point person within a set time frame</p> <p><b>FOLLOW-UP:</b> Follow-up on any questions you were unable to answer after speaking with your United Way Representative</p> <p><b>THANK:</b> Thank your colleagues when they have made their decision.</p>

Make your own investment – it's easier to ask others to give when you've already done so

Approach people you know first – this will help to build your confidence.

By collecting all the pledge forms, you will ensure that every employee has made an informed decision.

- Will you help me make our community a better place for everyone?
- Will you help United Way change lives?

# Your role as Employee Campaign Chair

*Be sure your results are reported to United Way regularly – all dollars should be submitted by **December 15th** of the current year.*

## Promoting your Campaign

Publicity and promotion instill spirit and help kick-off the fun for your United Way campaign. Brochures and newsletter items are available to help you deliver your message to employees. These items can generate awareness and encourage participation.

Employee Campaign Committees have successfully promoted their campaigns by:

- ✓ Using staff newsletters or intranet sites to present campaign highlights, success stories and other results United Way is achieving in our community
- ✓ Sending emails to provide campaign progress updates
- ✓ Displaying United Way posters and thermometers in highly visible areas
- ✓ Showing United Way campaign videos
- ✓ Coordinating department challenges
- ✓ Using special events to promote the campaign, add excitement and create fun

## Special Event Ideas

- Create your own golf course
- Pancake breakfast
- United Way trivia contest
- Coin war
- Piggy-bank contest
- Auctions – silent or live
- Raffle or 50/50 draw
- Bake sale / craft sale
- Sumo wrestling
- Tournaments
- Office pools
- Casual days

## 8. Establish monitoring/reporting

Update your campaign thermometer and report campaign results to all employees regularly. This ensures employees have the latest information, generating more campaign excitement and enthusiasm.

Follow-up shortly after the canvassing begins.

- ✓ Offer assistance if required
- ✓ Report your results to your United Way representative and to your CEO or Senior Management
- ✓ Conduct a mid-campaign analysis to ensure campaign plans are on track
- ✓ Revise your strategies, if necessary, to achieve your goals

# Your role as Employee Campaign Chair

## 9. Thank volunteers and celebrate success

United Way relies on your committee to ensure everyone involved in your campaign is appropriately recognized for their generosity and participation.

Remember to:

- ✓ Thank employees for their support of the campaign, including those who have chosen not to donate
- ✓ Thank all of your committee members and volunteers
- ✓ Thank all United Way donors

There are many ways to recognize the hard work and efforts of your volunteers. Send them letters and post a thank you notice on your staff bulletin board. Involving your CEO provides special recognition. Some campaign committees organize a recognition event to celebrate their achievements, which is a nice way to finish off your campaign.

## 10. Evaluate your campaign

It is important for the campaign committee to analyze and evaluate all aspects of your campaign. The analysis is an important planning tool for future campaigns. United Way offers experience and facilitation to assist your team in conducting your final analysis.

- ✓ Review campaign results and compare them to your objectives. These recommendations will be valuable in planning next year's campaign.
- ✓ Write a report identifying campaign activities and results; it will be appreciated by next year's ECC.
- ✓ File the report in your organization's United Way Campaign file.
- ✓ Send a copy to United Way and your CEO or Senior Management.

Visit the campaign toolkit at [peiunitedway.com](http://peiunitedway.com)

Remember that UWPEI will assist your team in conducting your mid-campaign and post campaign analysis.

Contact your United Way representative for further information.

# APPENDIX

## Campaign materials

Promotional materials supplied for your workplace campaign.	United Way branded materials available to borrow.
Pledge forms	Banner
Brochures	Booth
Video	Aprons

### Incentives\* to promote pledge card giving:

Offer an appealing incentive for making a payroll donation or one time gift. Here are some examples of incentives that you may want to consider:

- ✓ Reserved parking spots
- ✓ Lunch in the boardroom with CEO
- ✓ Company promotional items
- ✓ Extra break/shortened work day/ Friday afternoon off
- ✓ Free oil change
- ✓ Free assistance with personal income tax preparation from your accounting department
- ✓ Birthday vacation day
- ✓ A travelling trophy that goes to the department with the highest participation
- ✓ Dress down day(s)
- ✓ Provide certificates for free coffee for a week
- ✓ Provide certificates for free meal(s) if an in-house cafeteria is available
- ✓ Spring cleaning or housekeeping service coupon
- ✓ A “make your own ice cream sundae” party
- ✓ Trade your job with the senior manager of your choice for a day

*\* Hand out pledge cards at the kick-off and encourage return of the pledge card at the end of the event to be entered in to a drawing for a prize. A donation must not be required in order to be eligible for the draw. Encourage all staff members to submit their pledge form even if they are not donating to ensure that the organization can get an accurate sense of their participation rate.*