

**United Way**

# **Campaign Guide**



**Questions?  
Contact United Way!**

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**United Way**

**Lethbridge &  
South Western Alberta**

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## Welcome to the Team!

Welcome to the United Way of Lethbridge & South Western Alberta's Annual Campaign! We want to take a moment to thank you in advance for helping us complete a successful campaign.

Whether you are new to your volunteer role or have been with us for years, we want to make this campaign fun and enjoyable. Our goal is to help you feel confident in your role as Employee Campaign Champion and know that you are making a positive difference in your community.

Employee Campaign Champions are an integral part of the United Way Campaign. You are the go-to person, the one who assembles a team, creates a plan and acts as an "ambassador" for United Way. Part of your role as an ambassador includes:

- Learning about United Way and the programs and services we fund
- Knowing what we do
- Collaborating and creating partnerships
- Recruiting canvassers and volunteers to assist you with your campaign
- Communicating with United Way staff
- Creating awareness and motivating your team
- Collecting pledge forms and answering questions
- Conducting an evaluation at the end of your campaign and making recommendations for next year

We realize that organizing your team and planning your workplace campaign, at times, may be challenging. We hope that the information presented in this guide will provide you with the groundwork needed for a successful campaign!

**We are behind you!**

# *Did you know?*

**United Way of Lethbridge  
& South Western Alberta  
will celebrate 75 years in 2016!**



## Why United Way?

Since 1941, United Way of Lethbridge & South Western Alberta has been working to create a world of possibilities for every member of our community.

With your support:

- We meet immediate **short-term needs** by providing stable funding to agencies, strengthening their ability to help people when they need it most.
- We address the **root causes of social problems** by investing in long-term efforts that work to change whole communities.
- We bring community resources and partnerships together to **tackle complex issues** and then pull together to make change happen!

We believe the best opportunity to change lives and social conditions depends on three key areas:

**From Poverty To Possibility** – We are working with the community to create opportunities, so individuals with low or limited incomes can prosper.

**Strong Communities** – We are supporting individuals and families so they can feel a personal sense of well-being and connection to their community.

**All That Kids Can Be** - From the early years to adulthood, we are supporting paths of development to help children and youth achieve their full potential.



## We Are Here to Help!

We are always here to help and support your campaign. Things we can help with or arrange include:

- Seeing is Believing Tours - Visit one of our partner agencies
- Agency speakers/workplace presentations
- United Way representative(s) at your event
- Promoting your community events
- Communication tools
- Answering your questions
- Providing promotional material (balloons, posters etc.)
- Day of Caring™ activities - a team from your workplace volunteers a few hours at a local charity

You can also visit [www.lethbridgeunitedway.ca](http://www.lethbridgeunitedway.ca) to find additional promotional material and educational tools such as:

- Brochures
- Pledge Forms
- Posters
- Electronic copies of this guide
- FAQs
- Event Best Practices
- Videos
- Email templates

If you need any assistance or have questions or concerns please do not hesitate to contact your United Way representative!

*Did you know?*  
Giving a little at a time  
amounts to BIG changes!

## 1. Review Last Years' Campaign

Speak with the past Employee Campaign Champion. Review files and results.

**More:** Reviewing last years' campaign will help your committee identify campaign strengths, opportunities, structure and overall flow of the campaign. It will also help you set realistic goals.

Here are a few questions to consider:

- Were committee members and canvassers prepared?
- Were the special events effective in generating fun, awareness and revenue?
- How was the campaign promoted?
- Was there an employee presentation with a United Way Ambassador speaker?
- Was there a budget?
- Were volunteers and donors thanked?

## 2. Set Workplace Goals and Monitor Progress

Set realistic, achievable and challenging goals, and track your progress.

**More:** Set your goals using the challenges and successes of previous campaigns as a benchmark.

Examples may include:

- Increase last year's achievement by 5%
- Increase employee participation by 10%

It is okay to ask for an increase in donors and dollars. Adding a few dollars to pledges helps keep up with inflation and makes sure donations make the same impact.

## 3. Recruit Your Committee

Build a committee of volunteers who represent your entire organization and are committed to success. If you've never run a committee before, contact us for help and support!

**More:** Don't plan to do it alone. A committee can help you plan and implement your entire campaign. The single most important element for success is recruiting the right people. Start this process early.

Forming a committee with a blend of new and returning members will encourage new ideas while maintaining continuity. The size of your organization will determine the size of your committee and its functions.

## Canvass

To plan the canvassing component of your campaign, recruit canvassers that are representative of your entire workforce and facilitate peer-to-peer canvassing. People give generously when they are asked by a peer for support.

Some of the most important members of your team will be your canvassers. These people are on the front lines and are directly responsible for educating co-workers about United Way and asking for their financial support. One of your most important roles will be building enthusiasm and commitment within your team.

## 4. Involving Senior Management

Invite Senior Management members to be a visible part of your campaign.

**More:** While your CEO should not be asking employees directly to make a monetary contribution, they should champion the cause and rally the employees by sharing information and the impact United Way has. Be sure to provide information to your CEO so that they can spread the news. Some ways for them to take an active and visible role include:

- Sending a personalized message to each employee endorsing the United Way campaign
- Attending and/or speaking at your campaign events
- Approving the time necessary to plan and implement your workplace campaign
- Recognizing/thanking committee members

## 5. Plan and Promote Your Campaign

Set campaign dates. Plan special events and utilize tools to educate employees and boost engagement.

**More:** The main objective of your campaign is to generate resources by increasing employee awareness of community needs, the services available and how donations are being utilized in our community.

Awareness is achieved through ongoing communications and employee presentations. Inviting a United Way Ambassador speaker to present is an excellent resource for motivating colleagues to take part. A United Way presentation can bring your campaign to life through real stories from people who have overcome adversity. No time for a live presentation? We also have short videos online ( 1.5 – 5 minutes) you can share.

## Incentives

Incentives are proven to be effective if designed to achieve a specific objective. An incentive is a reward to an individual or group participating in the campaign in a specific, pre-determined manner.

Special events are a fantastic way to create awareness, infuse your workplace with energy and boost employee morale. They certainly can raise money, but the real value in special events is the excitement and momentum they create for your annual United Way workplace campaign.

With the amount of time and energy required to pull off a successful special event, your return on investment will not be nearly as high as a focus on payroll deductions, so plan carefully and do not rely solely on special events for your fundraising.

### Promotions

The purpose of promotions is to increase campaign awareness, to create a sense of community spirit and to offer information that encourages an informed decision. **Ask for the Canvassing, Promotions, Special Events and Incentives guide or find it online at [www.lethbridgeunitedway.ca/Toolkit!](http://www.lethbridgeunitedway.ca/Toolkit!)**

### 6. Highlight The Leadership Giving Program

Leadership giving is a program designed to recognize individuals for generous gifts through United Way.

**More:** The Leadership Giving Program recognizes personal annual contributions of \$1,200 or more a year. Benefits of the Leadership Giving Program include:

- Public recognition in the United Way of Lethbridge & South Western Alberta's Honour Roll
- Inspire and set a profound example for giving
- Tax benefits

Present the case for Leadership giving to everyone. Encourage everyone to contribute or increase their gift. Consider a special presentation/challenge to your senior management team.

**\*Please note that the leadership level of \$1,200 is consistent with United Way Leadership levels across Canada\***

### Leadership Matching Challenge

You can set a powerful example by making a financial commitment to the community through the United Way. Many companies have a strong 'giving' culture and will match employee contributions as much as dollar for dollar. Ask if your company has a "matching" donation policy.

### Donations Make A Difference:

More than 500 companies in Canada will match donations made by their employees to charitable organizations like the United Way. Matching gifts are a very important source of funds for charities and they are an easy way for you and your fellow employees to make a donation that will have a more significant financial impact.

To find out whether your company has a matching gift program, you should ask your human resources or personnel department.

If your company has a matching gift program, please let us know. And don't forget: in addition to employees, some companies match gifts from spouses and retirees too!

### Matching Gift Procedure:

1. You get a matching gift form from your employer, usually from the human resource department.
2. The company verifies the eligibility of the employee and sends a cheque to the United Way of Lethbridge & South Western Alberta.
3. You will be mailed an official tax receipt for your gift or if you take advantage of payroll deductions for your donations, it will be on your T4 slip at the end of the year. Once we receive your employer's matching gift, they will receive a receipt for their gift.

If you have questions about matching gift programs, please contact our office.

### 7. Thank Your Volunteers and Celebrate Success

Acknowledge committee members, volunteers and donors. Celebrate success with your entire organization.

**More:** One of the most important phrases in fundraising is 'THANK YOU'. Plan a celebration to announce your campaign and achievement and thank each and every employee for their support and participation. Also thanking those who didn't directly donate is a good way to encourage support for future campaigns.

Hold a special event – take pictures and share with everyone in the office. It is important to communicate the impact the donations have made.

**Don't forget, we're always here to help. Just call!**



**Did you know?**  
The top reason people don't give is because they haven't been asked?  
**Ask everyone!**

## 8. Evaluate Your Campaign

Wrap up your campaign by reviewing all activity and related results. Document any recommendations to improve next year's campaign.

**More:** It is important for the committee to analyze and evaluate all aspects of the campaign. The analysis acts as the foundation for an even more successful campaign next year. If requested, United Way can help you through this final process.

- Review campaign results and compare them to your objectives (the recommendations will be valuable in planning next year's campaign)
- Write a report identifying campaign activities and results
- File the report in your United Way campaign file and send a copy to United Way
- Celebrate everything you've learned and be proud!



**Thank you!  
Together...  
We Are Possibility!**

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