



**United Way
Niagara**



EMPLOYEE CAMPAIGN COORDINATOR WORKBOOK

This workbook will help you to begin your campaign planning. Ask your United Way staff partner or Sponsored Employee to assist you.

REVIEW YOUR CAMPAIGN

Answers to these questions can be obtained from your previous ECC, files, or your UW Staff Partner. Anytime you answer “no” to a question is an opportunity to grow your campaign.

Campaign Details

Campaign dates: _____

How was the campaign kicked off?

Campaign Committee Team

How many committee members were there? _____

Were there enough members? Yes No

What positions should be included this year?

Was there a Leadership Chair? Yes No

Who processed pledge forms / donations? _____

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

Campaign Ambassadors

How many Campaign Ambassadors were recruited? (Obtain list from previous ECC) _____

What was the ratio of Campaign Ambassadors to employees? _____

Was this enough? Yes No

Were pledge forms distributed personally by Campaign Ambassadors in all areas? Yes No

Was there an orientation / training for Campaign Ambassadors? Yes No

Campaign Logistics

Was a one-on-one ask incorporated? Yes No

Was there an early bird draw? Yes No

Was there a final pledge draw? Yes No

What was the theme of the campaign? _____

Was there a United Way speaker at the kick-off? _____

How many employees attended kick-off? _____

How was the campaign publicized? _____

How were donors and volunteers thanked? _____

Was there an agency tour? _____

Leadership (Work with your United Way Staff Partner on these questions)

How many Emerging Leadership donors (less than \$1,200) have left the workplace? _____

How many Leadership donors (\$1,200+) have left the workplace? _____

Did your organization hold a Leadership presentation? Yes No

How many attended? _____

Were Emerging/Pre-Leadership donors invited? Yes No

Corporate

Was there a corporate match? Yes No

If yes, what was the formula? _____

SWOT Analysis

Strengths	Weaknesses
Opportunities	Threats

DEVELOP YOUR STRATEGY

STRATEGY	TACTIC	WHEN?	BY WHOM?
Grow Leadership	Build a Leadership Team to make personal asks and follow up.	Two weeks pre- campaign	Leadership Chair
Increase Participation & Average Gift	Recruit Campaign Ambassadors from all levels and locations (if applicable of your organization) and schedule an orientation session.	Two weeks pre- campaign	Campaign Ambassador Coordinator
Focus on United Way Community Fund	Invite United Way to deliver a presentation at an all staff meeting.	Day One of Campaign	ECC
Engage Labour	Ask the Union Executive to nominate an influential union representative for the committee.	One month pre-campaign	ECC / Union Executive
Win a Spirit Award	Develop a campaign plan that achieves all the outlined criteria for the award.	One month pre-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 timelines. Refer to this page when developing your campaign calendar.

SET YOUR GOALS

Example formula for increasing the number of donors:

$$\underline{\hspace{2cm}} \times \underline{\hspace{2cm}} \% = \underline{\hspace{2cm}}$$

Current # of Employees

Participation Goal

Donor Goal

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

Use the following table to help you record your goals:

		Previous Results	Goals
GOALS	Participation	%	%
	Overall \$	\$	\$
	Average Gift	\$	\$
	United Way \$	\$	\$
LEADERSHIP (\$1,200+)	Total Leadership Donors	#	#
	Total Leadership \$	\$	\$
	Retention rate - % Leadership donors that renewed their gift	%	%
	Total of New Leadership Donors	#	#
Special Events	Special Events	\$	\$

RECRUIT YOUR TEAM

Fill in the boxes with your team members. Use and add relevant boxes for your campaign. **TIP:** if your organization is unionized, have an influential union member co-chair your campaign.



Figure 1: Example of a Campaign Team Structure

SAMPLE CAMPAIGN CALENDAR

	Monday	Tuesday	Wednesday	Thursday	Friday
Pre-Campaign			ECC & Leadership Chair attend Campaign Training		
	12:00 pm— Campaign Rep Orientation in-house training facilitated by United Way		Leadership Presentation to “set the pace” and build momentum	Reminder email about Kick-off event sent out to staff	
Campaign Week		8:30 am— Kick-off with agency speaker for day shift 5:30 pm— Kick-off with agency speaker for night shift		Early bird prize draw for returned pledge forms at 2:00 pm Mid-Campaign update sent out to staff	Casual Friday – free for all who returned their pledge forms Reminders distributed and follow-up
	ECC/ Canvassers personally deliver pledge packages and speak with each employee.				
	Minute to Win it Talent Show @ lunch – free for those who have returned pledge forms	Final prize draw @ 4:00 and CEO dress up.	Wrap-up BBQ Reveal total awards and prizes. Thank donors and volunteers.	Implement Thank-You Plan.	IMPORTANT : Submit pledge cards and cash to United Way. Include required copies to your payroll department.
Post-Campaign Follow up	Campaign Evaluation. Debrief with campaign committee. What could be done differently next year?				

YOUR CAMPAIGN CALENDAR

	Monday	Tuesday	Wednesday	Thursday	Friday
Pre-Campaign					
Campaign Week					
Post-Campaign Follow up					

ESTABLISH YOUR TIMELINE

The best results come from a short, goal-oriented campaign. A one to three week time frame is ideal. The timetable identifies tasks, start and finish dates and people responsible. United Way kicks off the annual campaign in September and wraps up in the New Year.

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

✓	TASK / OBJECTIVE	DATE	RESPONSIBILITY
	Campaign evaluation (previous year)		
	First meeting with UW Staff Member		
	First committee meeting		
	Campaign orientation session (ECC)		
	Leadership Chair orientation		
	Committee orientation		
	Campaign Ambassador orientation		
	Pledge form production		
	Special Event planning		
	Thank You Planning		
	Leadership presentation		
	Campaign Kick-Off		
	Early Bird Draw		
	Mid-campaign meeting		
	Final pledge form draw		
	Wrap Up event		
	Thank Donors & Volunteers		

SAMPLE EMAIL MESSAGES

ANNOUNCE THE CAMPAIGN

To: All Staff
Subject: United Way campaign

How would you like to make a difference in your community?

On *(Date)*, we will be kicking off *(Company's Name)* *(Year)* United Way Campaign. By giving to United Way, you can create change right here at home.

Last year, our community raised *(Last Year's United Way Campaign Goal)* to help address some of our community's most pressing issues. This year, we are going to follow that with even more success!

This is a great opportunity to get involved and change a life by building the strongest community possible. I will be contacting you soon with more details.

Thanks in advance for your participation.

ANNOUNCE THE KICK-OFF

To: All Staff
Subject: *(Company Name & Year)* United Way Kick-Off

You are invited to a *(Event Name)* as we Kick-Off *(Company's Name & Year)* United Way campaign.

Date:
Time:
Location:

Don't miss this opportunity to hear how our contributions make it possible for United Way to help more people in more ways. You'll get to hear stories of how our donations make a difference in our community. *(Name of United Way presenter)* will be joining us to share some success stories and explain more about how United Way works.

You can make a difference!

SAMPLE EMAIL MESSAGES

THANK YOUR DONORS

To:
Subject: Thank you!

Dear (INSERT DONORS NAME),

Thank you for making a donation to United Way and helping to make a real difference in your community. Your generosity will provide opportunities for thousands of local people to change their lives.

On behalf of United Way and [organization name]'s Campaign Committee, please accept my sincere thanks for your generous contribution to this year's campaign. You can be assured that your gift will have a significant impact on the lives of many.

[Organization name] is proud to support United Way in its efforts to develop long-term solutions to community problems. This year we raised \$XX,XXX thanks to the generosity of people like you. That's an increase of XX.X% over last year's achievement.

The impact of your gift will reach far and wide, creating opportunities for youth, empowering individuals with disabilities and those in crisis, and helping people to move out of poverty. Ultimately, your gift represents an investment in the future of our community.

Thank you for your support.

Sincerely,

(Name)
Employee Campaign Chair

SAMPLE EMAIL MESSAGES

SUPPORT FROM SENIOR MANAGEMENT

Senior Management's support of your United Way campaign is one of the keys to its success. Senior Managers may demonstrate support by sending an email or adding a letter to payroll endorsing the United Way campaign. **A sample email and/or letter to employees from the CEO may look something like this:**

To: All Staff
Subject: United Way

Dear (INSERT EMPLOYEE NAME),

Did you know that United Way is more than a fundraiser? United Way brings together community members, businesses and local agencies to become part of a community-building effort that delivers over 115 programs and special initiatives in your community. By working with community partners and volunteers, they are able to serve youth in stressed neighbourhoods through After School Programs and coordinate the assembly and distribution of more than 2,400 backpacks filled with school supplies. Additionally, they distribute Welcome Home Kits to help people transitioning from a shelter to a permanent home. Only through United Way can one gift support so many essential local services.

Last year, employees at (INSERT COMPANY NAME) rose \$ (INSERT AMOUNT) to strengthen and support our community through United Way. The gifts made here at (INSERT COMPANY NAME) helped children and adults with developmental disabilities, provided breakfast programs for young children who would otherwise go hungry, supported women escaping abuse, and much, much more. Through our gifts, we made a real difference in our community.

United Way is the most effective and efficient way for you to help people who truly are in need in your community. This is why I support United Way and (INSERT COMPANY NAME) offers you the ease of payroll deduction to donate.

Please take time this year to learn more about how United Way is making our community a better place to live, and consider joining me and many other employees who pledge a gift.

Sincerely,

(Name)
CEO

SAMPLE EMAIL MESSAGES

RETIREE LETTER

There may be a very important employee group that you haven't included in your campaign. Many workplaces now include retirees in their campaign activities and fundraising programs. United Way offers a monthly payment plan for donors.

Dear (INSERT RETIREE'S NAME),

All employees, both current and retired, should be proud of our organization's tradition of supporting our community through United Way. It has always been a great source of pride to me.

When you give to United Way, you invest in a network of programs and special initiatives that help people in your own community. Every day with your help, United Way funded programs across our cities assist people by providing after-school programs to youth in stressed neighbourhoods, breakfast programs for young children who would otherwise go hungry, life skills programs for individuals living with a disability, shelter to women escaping abuse, employment training to women and much, much more.

Many of you volunteer your time to the community because it's important to you. I volunteered to head up this year's campaign for retired employees because I truly believe that supporting United Way is one way we can truly make a difference in other people's lives and create change in our communities.

Help make your community a better place for everyone. Please complete the enclosed pledge form and return it in the envelope provided. If you have any questions, please call me at [phone number] or e-mail me at [e-mail address]. I would be delighted to answer any questions you may have. I hope you will give this request careful consideration. On behalf of the [organization's name] United Way Campaign Committee, I thank you.

Sincerely

(Name)
Retiree Chair

**EVERY DAY, PEOPLE IN OUR COMMUNITY
NEED HELP.
Offer a helping hand.**



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