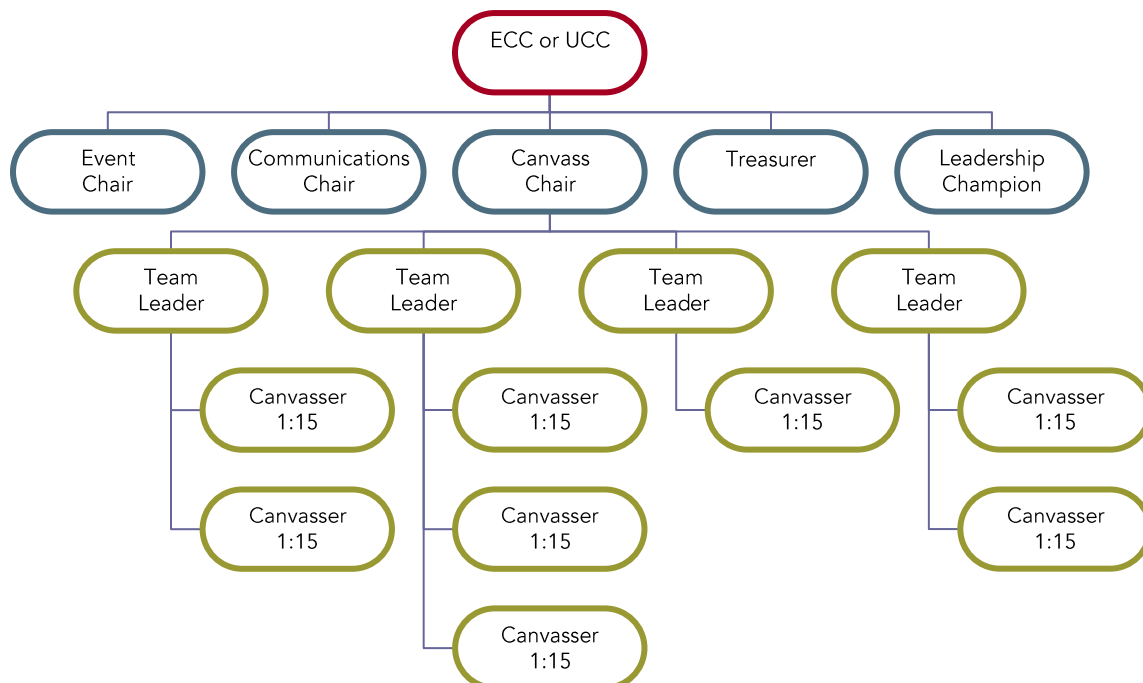




# Campaigns in Larger Workplaces

*The workplace committee is the key to fundraising in larger workplaces. The Employee Campaign Coordinator (ECC) and committee members work closely with United Way staff partners/loaned representatives to ensure that the campaign runs within established timelines and that it uses trusted strategies and best practices.*

## Sample Committee Structure



The size and structure of a United Way committee will vary depending on each individual workplace. The essential components are:

- One individual who is designated as the liaison between the United Way and the workplace – the ECC or UCC.
- Representation on the committee from different areas of the workplace including any different sites, different departments, job category and union representation if applicable.
- Optimum Canvasser/employee ratio is 10 or 15 employees for each Canvasser.
- Often Canvassers report directly to their Canvass Chair, but Team Leaders are recommended for all departments if the size of workplace warrants it. This is to ensure that the committee member responsible for the canvass can streamline communications and follow-up to larger numbers of canvassers more efficiently.

## Committee Roles, Responsibilities and Guidelines

POSITION	RESPONSIBILITIES	TIMELINES
Employee Campaign Coordinator (ECC) or Union Campaign Coordinator (UCC)	<p>The ECC/UCC is recruited by the CEO of the organization and is the primary liaison with United Way. This individual is responsible for ensuring that the workplace campaign is managed and resourced effectively, with established plans, timelines and updates.</p> <ul style="list-style-type: none"> <li>• Plan &amp; timelines confirmed</li> <li>• Committee recruited</li> <li>• Organizing training/orientation of committee</li> <li>• Setting realistic, but challenging, goals – financial as well as participation</li> <li>• Monitoring all aspects of campaign</li> </ul>	<ul style="list-style-type: none"> <li>• April/May</li> <li>• May</li> <li>• May/June</li> <li>• May/June</li> <li>• Ongoing</li> </ul>
<b>COMMITTEE</b>		
Events Chair	<p>The Events Chair is responsible for all events organized during the United Way campaign. Some of these events are fundraisers while others may be awareness events. The Events Chair will ensure that events do not impact on the workplace canvass.</p> <ul style="list-style-type: none"> <li>• Identify events for this year</li> <li>• Ensure events are timed to protect canvass</li> <li>• Logistics for events</li> <li>• Liaise with United Way re: license requirements, materials, etc.</li> <li>• Recruitment of volunteers for events</li> </ul>	<ul style="list-style-type: none"> <li>• May</li> <li>• May</li> <li>• May</li> <li>• June</li> <li>• June</li> </ul>

POSITION	RESPONSIBILITIES	TIMELINES
Communications Chair	<p>The Communications Chair is responsible for communications and information pertaining to the United Way workplace campaign.</p> <ul style="list-style-type: none"> <li>• Marketing Plan, developed in consultation with ECC and United Way staff</li> <li>• Coordination of materials, newsletters, displays, posters, banners, etc.</li> <li>• Coordinate agency speakers with United Way staff and Team Leaders</li> <li>• Kick-off of workplace campaign and wrap-up</li> <li>• Communicate final results to workplace employees</li> </ul>	<ul style="list-style-type: none"> <li>• May</li> <li>• July</li> <li>• Aug</li> <li>• Sept/Nov</li> <li>• Sept/Nov</li> </ul>
Canvass Chair	<p>The Canvass Chair is a key position on the committee and is responsible for canvassing, which makes up the majority of United Way fundraising. The Chair recruits Team Leaders who, in turn, recruit Canvassers.</p> <ul style="list-style-type: none"> <li>• Recruit Team Leaders</li> <li>• Train/orient Team Leaders</li> <li>• Ensure timelines are communicated</li> <li>• All materials (personalized pledge cards, brochures, banners) from United Way</li> <li>• Liaise with Treasurer</li> </ul>	<ul style="list-style-type: none"> <li>• May</li> <li>• June</li> <li>• June</li> <li>• Aug</li> <li>• Sept/Nov</li> </ul>
Treasurer	<p>The Treasurer is responsible for counting all cash and payroll deduction amounts, monitoring pledge cards and events proceeds and reporting these results to the ECC and/or United Way.</p> <ul style="list-style-type: none"> <li>• Develop process for collecting and verifying envelopes</li> <li>• Receive envelopes from team leaders (and/or canvassers)</li> <li>• Track and monitor results</li> <li>• Communicate results to ECC &amp; committee</li> <li>• Verify envelopes</li> <li>• Point person for United Way to verify envelopes</li> <li>• Ensure all cash donations are forwarded to United Way prior to end of campaign (to ensure receipting as per CRA rules)</li> </ul>	<ul style="list-style-type: none"> <li>• Aug</li> <li>• Sept/Nov</li> <li>• Sept/Nov</li> <li>• Sept/Nov</li> <li>• Sept/Nov</li> <li>• Sept/Nov</li> <li>• end of Nov</li> </ul>
Leadership Champion	<p>The Leadership Champion is responsible for implementing a leadership giving campaign. The Leadership Champion ensures that leadership level (\$1,000 or more per year) donors are appropriately asked and followed up with, and that presentations are made to encourage people to think about giving at Friends (\$500 per year) or leadership levels.</p> <ul style="list-style-type: none"> <li>• Follow up with leadership donors</li> <li>• Liaise with United Way regarding thank you letters, stewardship letters, etc.</li> <li>• Working closely with United Way and ECC, organize presentation(s) about leadership giving</li> </ul>	<ul style="list-style-type: none"> <li>• Sept/Nov</li> <li>• Oct/Nov</li> <li>• Sept/Nov</li> </ul>

POSITION	RESPONSIBILITIES	TIMELINES
<b>WORKPLACE CANVASS</b>		
Team Leaders	<ul style="list-style-type: none"> <li>Recruit Canvassers</li> <li>Identify and breakdown lists by dept. or unit for Canvassers</li> <li>Work with United Way (and Canvass Chair) to organize training/orientation</li> <li>Distribute materials to Canvassers</li> <li>Ensure canvass is occurring within timelines established by ECC &amp; committee</li> <li>Monitor results and liaise with Treasurer</li> </ul>	<ul style="list-style-type: none"> <li>July</li> <li>Aug</li> <li>Aug</li> <li>Aug</li> <li>Sept/Nov</li> <li>Sept/Nov</li> </ul>
Canvassers (one canvasser for every 10 to 15 employees)	<ul style="list-style-type: none"> <li>Attend training/update/orientation session</li> <li>Pick up pledge cards/brochures for those being canvassed (plus some extras)</li> <li>Make "the ask" within timelines and forward pledge cards to Team Leader or Treasure (as defined)</li> </ul>	<ul style="list-style-type: none"> <li>Aug</li> <li>Aug</li> <li>As per plan</li> </ul>

## Multiple Location Campaigns

When building your campaign team, remember to ensure all levels and locations of your organization are represented on your employee committee. Experience shows that it is essential that each location has its own campaign.

By including a representative from each location, you will:

- Ensure all locations have input into the campaign plan.
- Avoid delays in relaying campaign information back to the various locations.
- Ensure all employees have an opportunity to learn about and contribute to the United Way.

Strategies for Each Location

**1. Recruiting a Location Coordinator:** responsible for recruiting, training and recognizing Canvassers, ensuring all employees are canvassed and monitoring campaign progress.

**2. Recruiting a Location Campaign Team:** to assist with implementing the campaign.

**3. Recruiting and Training canvassers:** Canvassers will need to familiarize themselves with the United Way; they may want to organize an orientation session.

**4. Canvassing:** locations may have shift workers, part time employees or employees who rotate from one location to another to fill vacant positions. See the ECC Guide for canvassing strategies. (The guide is available online at [www.unitedwayguelph.com](http://www.unitedwayguelph.com) or from your United Way staff representative.)

**5. Communications and Publicity:** A challenge often faced by multiple location campaigns is how to make employees at all locations feel part of the campaign. To avoid isolation, ensure that information is relayed back to location employees regularly, including dates, timelines, campaign theme, results, events, etc. Sometimes a friendly competition between the locations helps, especially if the results are regularly communicated.

**6. Local Content:** If the location is in another community, coordinate with your local United Way to ensure the location's United Way provides information, brochures, speakers and support to the Location Coordinator.

**7. Reporting and Monitoring:** It is crucial that employees understand the procedures and contact names for returning pledge cards. A system needs to be developed and pledge cards can be returned to Location Coordinators, Canvassers and central payroll department. Location Coordinators may wish to meet at least once during the campaign to discuss any concerns and/or problems and to re-visit strategies to ensure that they are working.

**8. Recognition for a Location's Campaign Team:** This could be done in a variety of ways – CEO hosts a luncheon/reception for all head office and location volunteers, CEO attends location meeting with Location Coordinators to thank Canvassers, or Canvassers receive a personalized thank-you letter from the ECC, CEO or Location Coordinator.

Thanks to the United Way serving Kingston, Frontenac, Lennox and Addington for sharing this information.

## **United Way Guelph Wellington Dufferin**

85 Westmount Rd, Guelph ON N1H 5J2  
519-821-0571 – [info@unitedwayguelph.com](mailto:info@unitedwayguelph.com) – [www.unitedwayguelph.com](http://www.unitedwayguelph.com)