

WORKPLACE CAMPAIGN BEST PRACTICES GUIDE

A step-by-step guide to running an employee giving campaign



United Way
Guelph Wellington
Dufferin

SETTING YOU UP FOR SUCCESS

Thank you for stepping up and volunteering to run an employee giving campaign at your workplace to support your community.

We're happy to have you and we're here to support you.

When you run an employee giving campaign, you are bringing your co-workers together, inspiring them to make an impact, and joining other local organizations in creating ripples of positive impact. Along the way, you'll meet new people, build your network, learn new skills, and hopefully have a lot of fun!

This playbook has been created to help you implement your in-person, virtual or hybrid employee giving campaign. These resources can help address the risks associated with workforce or resource reduction, decrease of in-person engagement or fundraising opportunities, and changes to face-to-face campaign opportunities.

In this toolkit, you'll find everything you need to promote your campaign, get everyone excited and make this your best campaign ever.

- Your team at United Way

SUPPORTING UNITED WAY

Every donation contributes to creating lasting social change and improving local lives. It creates ripples of positive impact across our community that swell to waves of change.

When you donate to United Way, you are investing in your local community. You are giving your family, friends, and neighbours access to support when they need it most. Your donation is strategically invested right where you live, work, and raise your family. United Way holds itself accountable to its donors, and invests donated resources as wisely, efficiently, and effectively as possible, generating a high return on community investment. We rigorously monitor and report on the impact of our investments so donors can be confident their investment is making a positive difference.



CAMPAIGN VOLUNTEER ROLES



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RECRUIT YOUR VOLUNTEER TEAM

Volunteers are an essential part of every employee giving campaign.

Getting involved in a United Way employee giving campaign is a unique volunteer experience, offering professional development opportunities, a chance to meet other colleagues, and an opportunity to drive work that improves local lives.

There are some specific volunteer roles we recommend to run a best practice campaign. In addition to those noted on the following pages, here are a few others you may want to consider:

- Special event coordinator
- Leadership giving lead
- Engagement lead
- Retiree liaison
- IT representative

Contact us to book a virtual training session for you and your team.



VOLUNTEER ROLES

Your volunteer structure will need to reflect the size and scope of your organization and the campaign you're running. Here are a few key roles:

1. Employee Campaign Coordinator

Local campaign lead(s)—1 or 2 volunteers

- This essential volunteer role works closely with a United Way staff partner to plan and oversee a successful and fun campaign
- Demonstrates leadership in the recruitment and coordination of a committee and ambassadors
- Rallies support for your organization's campaign
- Shares information about United Way and answer questions
- Thanks donors

2. United Way Committee

Local campaign champions—3 to 20 volunteers

- Your committee will collaborate to generate event ideas and fundraising strategies for your campaign
- Plan and execute fundraising events for your campaign
- Help educate and share relevant information with co-workers about United Way

3. United Way Ambassadors/Canvassers

Local campaign promoters—1 to 3 / floor or business unit

- Ambassadors help spread the word and generate excitement for your campaign



TRAINING

Ensuring your team of volunteers know their roles and how to champion United Way will help your campaign be successful.

United Way has many online resources that can be used to train your team and make sure they have the tools to succeed, including:

- Best practice documents (just like this one!)
- Online donation and pledging demos and walk throughs
- Ambassador training
- Executive presentations and training
- Videos on United Way's work

Contact your United Way staff partner for links or to set up a training session for your team.



EXECUTIVE SPONSOR & SUPPORT

Having an executive sponsor and executive support for your campaign can be a key element in running a best practice employee giving campaign. Seeing support from your organization's executive is vital in rallying support and fueling passion for your campaign. In a virtual campaign, it's important to have executive open any virtual events and send messages about the campaign out to staff.

To succeed in your best practice campaign, have your executive sponsor or support share why they have chosen to run a United Way employee giving campaign. Sharing why they care about United Way's work will help people feel connected to your campaign and feel inspired to participate.

Your executive sponsor or support will:

- Rally Support for your workplace campaign by encouraging colleagues and/or employees to attend events, participate in activities, and support your campaign
- Share their story of why they support United Way and care about United Way's work
- Kicks off the campaign by making their donation first
- Encourage colleagues and/or employees to step up and support the community
- Shows leadership and continuously thanks everyone who supports the campaign
- Provides leadership and support when required to employee campaign coordinator and campaign volunteers



CAMPAIGN PREPARATION



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PLANNING A SUCCESSFUL CAMPAIGN

Before you get started, make sure your executive is on board and can participate. They will help to drive engagement with your campaign by showing their support. Here are a few best practices to spread excitement and drive participation:

- Ensure employees are educated about United Way, informed about your campaign activities, and encouraged by their supervisor to participate
- Offer rewards for achieving a certain level of participation
- Develop a communications plan that uses multiple mediums to educate staff about United Way and rally employees around workplace campaign activities
- Offer unique United Way engagement activities to educate and engage staff during the campaign and year-round
- Avoid asking employees to donate multiple times: implement an education, pledge, then play best practice campaign



STEPS TO RUN A SUCCESSFUL CAMPAIGN

1



CONNECT

With your staff partner to learn about United Way's work and access support

2



SET

Campaign dates, timeline, and goal(s)

3



RECRUIT

Ambassadors, executive sponsor, and build your volunteer committee

4



PLAN

Fun activities, incentives, and / or contests

5



PUBLICIZE & PROMOTE

Your campaign to employees so they know what's coming

6



KICKOFF

Your campaign and share why people should get involved

7



ASK STAFF TO DONATE

Providing an opportunity for employees to give back

8



ENGAGE EMPLOYEES

Through events and engagement activities

9



COLLECT

Donations from employees, events, retirees, and field workers

10



CELEBRATE

Campaign results and thank all volunteers and donors!



SETTING YOUR GOALS

Planning a successful campaign includes setting realistic, timely, and measurable goals. To set realistic goals, be sure to review results from the previous year and consider how your workplace environment has changed since then. Running a virtual campaign will likely shift engagement as well.

Goal type	Examples	Best practices to achieve goals
Educational	<ul style="list-style-type: none">• Spread knowledge of United Way among employees• Engagement in learning activities	<ul style="list-style-type: none">• Provide multiple opportunities for employees to learn about United Way's work• Share United Way materials
Participation	<ul style="list-style-type: none">• Donation participation (= # donors ÷ # employees)• Attendance at activities and/or events	<ul style="list-style-type: none">• Offer rewards for early donations• Keep events simple, few, and fun
Financial	<ul style="list-style-type: none">• Increase in total dollars raised year over year• Increase and/or new Leadership donors	<ul style="list-style-type: none">• Include a strong donation ask in your campaign - Direct employees to your online giving system in campaign email• Leverage a corporate match



INCENTIVIZING GIVING

Offering incentives can be a great way to increase participation in your employee giving campaign. There are a myriad of ways your organization can get behind the causes you and your employees care about to make meaningful change in your local communities.

- Promote a corporate match to increase participation and create larger social impact
 - Match new donors, new and increased Leadership donations, employee volunteer time (dollars for hours), etc.
- Offer rewards and/or prizes for giving
 - Early bird draws for donations made early in your campaign, prizes for hitting campaign goals, etc.

BENEFITS OF CORPORATE DONATION MATCHING THROUGH UNITED WAY



You control the direction of your organization's corporate giving



You invest in a network of services that make a lasting impact in your community



United Way evaluates and measures the impact of your investments









United Way processes receipts and distributes the match for all your locations



BUILD YOUR CAMPAIGN

SAMPLE TWO WEEK CAMPAIGN

Monday	Tuesday	Wednesday	Thursday	Friday
Offer an educational opportunity for employees through an engagement activity	Have ambassadors present at meetings about your campaign and why your organization is supporting United Way		Offer an educational opportunity for employees through an engagement activity	
 EDUCATION & AWARENESS WEEK				
Kickoff your United Way employee giving campaign with a virtual event and send a rallying email linked to your online giving tool		Host a mid-week energizer—make it a team-building event Draw for an early bird prize for those who donated early in your campaign	Host a fun, virtual special event tied to your campaign theme 	Celebrate and wrap up your campaign—announce your collective achievement and thank everyone
		 PLEDGE & PLAY WEEK		



VIRTUAL, HYBRID OR CASHLESS CAMPAIGN

- 1** Ask United Way about the digital tools that best fit with your organization and 2023 campaign goals
- 2** Let us help you set up the digital tools for employee giving, special events, and volunteering to support your fun, virtual, and cashless campaign
- 3** Fundraise and celebrate the success of your virtual and cashless campaign



KICK OFF YOUR CAMPAIGN



To build excitement and bring your team together, you should have a kickoff event to launch your campaign early on. This is a great way to bring people together, let everyone know what to expect over the course of your campaign, and share why your organization is running an employee giving campaign.

Hosting a virtual kickoff doesn't have to be daunting. Here are a few suggestions to help:

- Virtual events are challenging if they're longer than 30 minutes—so keep your event agenda focused and interactive so your colleagues can actively participate online
- Add an interactive element, like running a poll, using a virtual white board, or asking United Way trivia questions

To host your best kickoff event online or in person (or both), here are a few general best practices:

- Invitations from your executive sponsor/support will lead to higher participation
- Ask a member of your executive to speak about why your company is supporting United Way and why they personally care about supporting United Way's work
- Consider joining a pre-existing meeting that already has a captive audience, like a town hall or weekly department meeting
- Promote matching opportunities your company is offering during your employee giving campaign
- Include a United Way speaker
- Embed a donation call to action in the meeting invite, or send a link to your online giving tool immediately after your kickoff



LEADERSHIP GIVING

Leadership Donors lead change in Guelph, Wellington and Dufferin through investments of \$1,200 and above annually. They demonstrate a deep commitment to the well-being of local people and pave the way for social change.

Leadership Donors:

- Are invited to virtual events and opportunities throughout the year—offering deeper insight into local social issues and networking opportunities.
- Receive monthly email updates on the impact of your support
- Receive an email signature badge to demonstrate their commitment to our community
- Receive valuable tax credits, which can reduce federal and provincial income tax every year: after tax, a \$100/month donation only costs about \$54



LEADERSHIP GIVING IN YOUR CAMPAIGN

Integrating Leadership Giving into your campaign can be an engaging way to promote philanthropy during your employee giving campaign.

- Identify a volunteer lead to focus on Leadership Giving. Depending on the size of your organization, a volunteer lead and possibly a volunteer committee can support effectively reaching out to employees. Your team should lead by example, motivate employees, and provide support so others can make an informed giving decision. A peer-to-peer connection is the most effective way to generate Leadership Giving results.
- Review your Leadership Donor list and goals. Working with your United Way staff partner, review the previous year's results and include those that are near the Leadership Donor level in your analysis. Set a Leadership Giving goal to help motivate you, your team, and your workplace.
- Consider a targeted Leadership Giving message. Your staff partner can support you with templated messages, letter, or email to connect with past Leaders and near Leaders to thank them, share impact, and to remind them about the Leadership Giving Program.
- Get creative and leverage executive support! Ask the executive team to help thank past Leadership Donors or share why they give at the Leadership or Major Donor level. Have executive host a virtual coffee for Leadership Donors.
- Host a Leadership or Major Donor event. Hold an exclusive event with those at the Leadership and/or Major Donor level or for those who are interested in learning more

Remember we're here to help! United Way staff and volunteers are here to thank and connect with Leaders virtually year-round. With thank you calls, email updates, and virtual event and volunteer opportunities throughout the year, Leaders have a unique experience!



SPECIAL EVENTS

Exciting events can amplify your campaign! Special events can be a great way to engage your employees.

Here are some tips to create engaging events:

- Set a clear purpose for each event: is it a fundraiser, team builder, or engagement opportunity?
- Mix it up with virtual and non-virtual activities
- Keep online events relatively short
- Encourage people to involve their families in some of the events
- For online trivia and other virtual events, keep the groups small and consider hosting multiple events so everyone can participate



ENGAGING RETIREES & FIELD WORKERS

It's important to include all staff members in your employee giving campaign—including field workers and those who have retired. Ensure they receive links to your online giving portal or send pledge forms out via email or mail. Be sure to share information about United Way's work and why they should participate in your employee giving campaign.

- Make giving easy through donation links or pledge forms
- Offer volunteer opportunities that align with these audiences—such as coaching, mentorship, or remote event planning
- Invite retirees and field workers to your virtual campaign events



ENGAGE YOUNG PROFESSIONALS

GenNext engages the next generation of leaders around philanthropy and community. It offers a unique way to engage young professionals in your organization through its unique events and experiences, or by integrating it into your young professionals' group.

You can connect GenNext with young professionals in your organization to:

- Learn more about how to get involved
- Leverage upcoming virtual events, volunteer opportunities and more
- Learn about a social issue this group specifically cares about
- Understand how you can apply some of our best practices around engaging young people in philanthropy to your campaign

Contact holly@unitedwayguelph.com to learn how we can help engage your employees virtually through GenNext.



WRAP UP

Your campaign wrap up is an opportunity to celebrate your employee giving campaign, announce campaign results, and thank all volunteers and donors!



Here are a few suggestions to help with a virtual wrap up:

- Keep your virtual event to 30 minutes so your colleagues can actively participate online
- Add an interactive element, like running a poll, using a virtual white board, or asking trivia questions about your campaign

Whether online or in person, here are a few general best practices:

- Invitations from your executive sponsor/support will lead to higher participation
- Ask a member of your executive to thank volunteers and employees for participating, donating, and increasing their understanding of local social issues
- Consider joining a pre-existing meeting that already has a captive audience, like a town hall or weekly department meeting
- Offer an incentive for people to attend:
 - Announce the winners of draws or campaign activities
 - Announce your campaign achievement (dollars raised and/or participation reached)

Whether you're hosting a wrap up event or not, be sure to let all staff know about your campaign achievement through whichever channels you use: social media channels, Intranet site, your website, a newsletter, or an email from an executive.



SUBMITTING DONATIONS

As you wrap up your campaign, consider how the funds are submitted to United Way, and any follow up items for your organization. This will ensure you have up-to-date reporting and that those who chose to donate receive their tax receipts.

- Donations made through any of United Way's employee giving or special event tools will be automatically processed by United Way
 - United Way will provide a payroll report for your organization, detailing which donors have made a pledge to have their donation deducted from their pay
- Special event and corporate donations can be sent electronically.
- While we encourage contactless donation methods, we accept cash and cheques. These can be dropped off or mailed to United Way or we can pick them up. Please connect with your staff partner to determine the best way to hand off any paper materials.
- If someone misses your campaign, donations can always be made through our website

Please connect with your United Way staff partner if you have any questions.



TAX RECEIPTS

A tax receipt can be a great incentive to give as they can offer a reduction in overall taxes every year. All one- time gifts made to United Way by December 31 at 11:59 p.m. will receive a tax receipt for the current year.

Here is some additional information on tax receipts to help answer questions that may come up:

- One-time donations (cash, cheque, or one-time credit card*) will receive a tax receipt by no later than February 28 of the following year
- Monthly credit card donations will receive a tax receipt by February 28 of the following year
- Payroll deductions will appear as a charitable donation in Box 46 of your T4 the following year (unless otherwise specified by your organization)
- Gifts of \$20 or more qualify for a charitable tax receipt
- Many special events donations do not qualify for charitable tax receipts. See the [Canada Revenue Agency's website](#) or ask your United Way staff partner for more details.

*If using e-Pledge, credit card donation receipts are issued by the platform immediately via email.



THANK YOU!

We're here to support you every step of the way!
Don't hesitate to call upon your United Way staff partner for information, answers, or inspiration.

Materials, videos, and more can be found on the campaign toolkit at www.unitedwaygwd.com



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