

# WHY RUN A WORKPLACE CAMPAIGN?

Workplace Campaign Guide



**United Way**  
Brandon & District

# What is a Workplace Campaign?

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The workplace campaign is the most successful fundraising option.

- ✓ Revenue generated from this type of campaign represents over 50% of overall revenue raised annually allowing us to invest in changing community conditions.
- ✓ Workplace giving is an easy and effective way to help employees make a difference and show them that their workplace is actively supporting the local community's most important issues.



# Why Give to United Way?

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- ✓ **It Makes a Difference**  
Employees are making an investment that benefits the entire community, not just one program, issue, or population, and this leads to a stronger, more sustainable place to live and work.
- ✓ **100% of the Donations Stay Local**  
There are NO administration fees deducted from donations. Thanks to the support of a provincial grant, our operating expenses and wages are fully covered.



# Benefits to Employees

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- ✓ **Education:** expands employees' knowledge about their community.
- ✓ **Enhanced Employee Relations:** participation in a campaign committee or events can help develop teambuilding skills and boost morale as employees learn to set goals, work together and achieve positive results.
- ✓ **Satisfaction:** having the ability to donate to an organization that address issues that are important to them, provides greater employee satisfaction.



# Benefits to Community

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- ✓ **Education & Awareness:** Running a campaign provides an easy way to bring the community together, convey educational messages and exposes employees to resources they may have never known about.
- ✓ **Expanded Outreach:** making it easier for more employees to give and take an active part in vital community volunteer activities.
- ✓ **Increased Partnership:** encourage cooperation and collaboration among charitable organizations, as well as between companies and non-profits. These partnerships help reduce duplication and build more meaningful community coalitions.
- ✓ **Delivering Impact/ Getting Results:** Funds raised during workplace campaigns go directly back to the local community to improve lives.



# Before the Campaign Strategy

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- ✓ Plan social and engagement events in the workplace.
- ✓ Set fundraising goals.
- ✓ Incorporate fun activities that will add momentum to the campaign.
- ✓ Create a campaign timeline. It's important to know when the campaign begins and ends.
- ✓ Create a marketing plan to engage your coworkers and communicate the work of the United Way.

No matter the amount a donor gives, whether at work or individually, they will want to know that their donation has made a difference.



# Recruit and Train a Campaign Team

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The Campaign Team will require an Employee Campaign Coordinator and should have a small committee with representatives from each department. This team can help in all stages of the campaign: planning, promoting awareness and distributing and collecting materials.

The coordinator will recruit other company employees who are energetic, organized and well-liked by their peers to form a campaign committee. The Coordinator will also train all campaign resource development staff on how to talk about United Way.



# The Employee Campaign Coordinator

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The chosen employee must have certain qualifications and perform specific tasks in order to coordinate a successful campaign.

## QUALIFICATIONS

- ✓ Be a leader.
- ✓ Be knowledgeable about United Way to speak on their behalf at the company campaign meetings and events and answer questions from colleagues.
- ✓ Bring fresh ideas to invigorate the campaign.
- ✓ Bring energy and enthusiasm to the employee campaign.

## TASKS

- ✓ Arrange pick up of campaign proceeds and participate in end-of-campaign evaluations.
- ✓ Maintain accurate campaign progress and results.
- ✓ Announce campaign results to the company and United Way.
- ✓ Thank all employees who contributed and members of the campaign team.
- ✓ Work closely with employees and United Way to solve donors concerns, if any.





# Set Goals and Timelines

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- ✓ Discuss which form of donation process is best for the company, either digital (ePledge), or paper.
- ✓ Set a fundraising goal, review last year's average gift and set a realistic total.
- ✓ Set a Goal of 100% Education and 100% Ask.



# Campaign Strategies

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- ✓ Ensure the campaign coordinator contacts a United Way representative to start planning for the campaign.
- ✓ Review the company's campaign history, including the total amount raised, participation rate, average gift and strategies used in previous years.
- ✓ Set beginning and end dates for the campaign.
- ✓ The Employee Campaign Committee should meet early in the campaign timeline and often to discuss goals, communication strategies, incentives and special events.
- ✓ Set campaign goals and publicize them throughout the company.
- ✓ Develop incentives to make influential changes such as early return of pledge cards, first-time donors, using payroll deduction and increased giving.



# Enlist the Support of Management

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- ✓ By personally endorsing the campaign, members of the senior management team demonstrate their commitment both to the organization's campaign and to improving lives in the community.
- ✓ Enlist leaders to speak at the campaign kickoff meetings and send emails or letters to the employees of the company.



# Steps to Take before Workplace Campaign

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## 6 WEEK BEFORE

- ✓ Meet with your Employee Campaign Coordinator to develop campaign goals and strategies.

## 4 WEEKS BEFORE

- The Campaign Committee should:
- ✓ Plan the campaign theme, special events and volunteer opportunities.
  - ✓ Set dates for employee meetings.
  - ✓ Identify speakers for employee meetings.
  - ✓ Request materials from the United Way. Everyone should receive pledge forms or ePledges\* and brochures.
  - ✓ Personalize pledge or ePledges forms with individuals contact information.

## 2 WEEKS BEFORE

- The Campaign Committee should:
- ✓ Promote the campaign's special events and meetings
  - ✓ Conduct a leadership giving campaign, one of the best ways to increase the success of the overall campaign
  - ✓ Send communication from CEO endorsing/announcing the campaign



# Inform Employees about Campaign Benefits

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Educate employees about United Way's work and the programs and initiatives that are in place to address the needs in the community. Some people relate to personal stories, while others want to hear about facts, figures and the return on investment.

## STRATEGIES

- ✓ Educate everyone about the positive changes their gift makes in the community. Include in every communication and event to remind people about the purpose of the campaign.
- ✓ Ask an employee to share a story about their experience with United Way.
- ✓ Provide volunteer opportunities at an agency in the local community. The United Way offers a seeing is believing tour of their partner agencies.



# Publicize the Campaign

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Communicate campaign information and events to all employees through United Way marketing materials, emails, calendar of events, posters, and more!

## HOW THIS HELPS

Clear communication improves participation and creates a positive response to United Way.

## STRATEGIES

- ✓ Provide United Way campaign supplies like posters, Impact brochure, videos.
- ✓ Communicate the campaign's calendar of events through the company's communication tools: email, intranet, newsletters, etc.
- ✓ Provide easy cut and paste messages to company employees by email.



# Kickoff the Campaign

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A campaign kickoff should be informative, exciting, relevant and FUN! Kickoffs can be as elaborate as events or as easy as snacks in a break room.

## HOW THIS HELPS

By gathering employees in one place, each person feels they are part of the overall goal.

## STRATEGIES

- ✓ Attend staff meetings to ensure every employee understands United Way's impact in the community. Include a campaign video or a speaker from a United Way initiative or program.
- ✓ Invite senior management and employee leaders to join you in asking the employees to contribute to United Way.



# Announce Results and Show Appreciation

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- ✓ Plan ways to finalize the campaign, celebrate accomplishments and thank employees for their participation and contributions.
- ✓ Saying “thank you” not only shows appreciation, but also sets the tone for year-round communication and next year’s campaign. People will have a more positive feeling about their donation, and receiving appreciation increases the likeliness that they’ll participate next year.





# Recognize Campaign Contributions

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- ✓ Recognize everyone's contributions to the campaign, not just their donations.
- ✓ Send a CEO communication by an email, intranet announcement or keepsake letter. The CEO's messages make a difference.



# After Campaign Strategies

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- ✓ Announce campaign results via email and/or during employee meetings. Make sure the results are reported to United Way.
- ✓ Show how one “small” gift combined with the entire company’s gift will create a big impact. Be specific about what the funds will do to improve lives in the community.
- ✓ Place “thank you” messages on bulletin boards and lunch rooms and other common areas in the workspace.
- ✓ Plan a campaign celebration. Invite United Way representatives to attend and say thank you.
- ✓ Support efforts for year round volunteer opportunities.
- ✓ Be active through social media, post pictures of employee participation and short videos about the community impact.



# Final Report and Processed Pledge Forms

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- ✓ Record all pledges on the tracking sheet provided in the campaign envelope, to ensure all cash/cheque donations receive a tax receipt for their donations.
- ✓ Return all forms to the United Way representative for processing after a copy has been sent to your payroll department.



# Thank you for your participation

You make a major difference in the lives of thousands of people in your local community.

