

## How to Organize an internal workplace Campaign

Laying out the groundwork

### **Obtain Support from Management**

Successful workplace campaigns need a strong endorsement from management and if there are unions, labour (where applicable). By agreeing to a campaign, your CEO/senior manager/union leader has already indicated an interest in supporting United Way and our community. Encourage them to take an active and visible role in your workplace campaign.

Some examples may include:

- Sending a personalized message to each employee encouraging participation
- Attending and/or speaking at your events such as your internal campaign kick off
- Approving the necessary work time needed to plan and implement your campaign

### **Recruit a campaign team and canvassers**

Start this process as early as possible. 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 how many members your committee will need and what their individual functions will be.

To increase donors, identify any specific areas with low participation rates and try to recruit a representative from that area as part of your committee.

### **Canvassers**

While your internal United Way campaign committee helps develop a plan and strategies, the canvassers are the actual front line volunteers. An ideal number of canvassers would be 1 canvasser per 10 co-workers. Canvassers should be familiar with the work of UWP and have access to materials and stats to answer questions to help ensure co-workers are making an informed decision about their charitable giving.

Effective canvassing begins with the selection of reliable, enthusiastic volunteers. Emphasize how much their involvement would mean to you, UWP, their workplace and our community. Tell them why you think they are the best person for the job. Canvassers should be:

- Representative of your workplace to facilitate peer to peer canvassing
- Able to ask for a financial donation without being self-conscious

Analyze, develop an Action Plan, and goal set!

### **Review past Campaign Results**

Begin your analysis by gathering information of previous campaigns. UWP can help with this. Identify the strengths and weaknesses while identifying possible opportunities.

- How many people participated
- What was the average gift
- How much money was raised
- Was canvassing effective – can it be improved
- Were special events effective?
- Major recommendations for the upcoming campaign

Once you have answered these questions, you are ready to develop your own action plan!

### **Goal Setting**

Establishing a clear goal is one of the most important best practices in any fundraising plan. Keep your goals realistic and attainable, but make sure they provide a challenge to your Campaign Team to keep them motivated. In addition to overall financial and participation goals, consider setting goals or challenges for specific departments or groups.

Goals don't always have to be purely total amount raised. Consider the following types of goals:

- Increasing participation rate
- Increasing average gift
- Increase number of leadership gifts (A leadership gift is \$1,200+)

**Once a goal is determined, publicly announce it in the workplace and ensure progress is communicated via email, thermometers and posters. Visualization of the goal will help co-workers take ownership of it.**

## Strategies for Retaining & Increasing Donors!

One of the primary objectives of almost every employee campaign is to retain and increase donors. Here is a list of suggestions to help you accomplish this in your workplace:

**\*\*\*\*Improve Your Canvasser Training:** Make sure you are sending out the most enthusiastic, well-prepared team possible. Insist all canvassers attend training and work with your United Way staff support person.\*\*\*\*

**Face-To-Face Canvassing:** People give to people, so make sure that employees are personally “asked” to support the campaign - either one-to-one by a canvasser or during the course of a group canvass meeting.

**Focus on Retaining Donors:** Let past donors know the impact of their donations. Make sure that people feel good about giving by thanking them for their gifts.

**Hold a Team Planning Session:** A Team Planning session facilitated by United Way will save you time and help you develop creative and effective strategies for retaining and increasing donors.

**Recruit a Representative Campaign Committee:** The people you recruit should reflect the general make-up of your organization, i.e., people from labour, management, support staff, each department/floor, various ethnic/cultural backgrounds, etc. If you already have a committee, identify areas with potential for increasing donors and actively recruit a committee member to ensure representation from all areas.

**Secure Visible Management Support:** Ensure that representatives from senior management/labour leadership are present at all key meetings and events.

**Ensure that Middle Management is on Side:** Present the campaign plan at management meetings. Have your CEO issue a memo outlining how she/he plans to participate in the campaign and listing the ways that other members of the management team can get involved.

**Set a Participation Goal and Declare it Publicly:** You may even want to build it into your campaign theme. Alternatively you can publicize the number of donors you are aiming for.

**Personalize all Pledge Cards:** It is much more difficult to ignore a form that has your name on it than one that is generic.

**Focus More on Pledge Card Canvassing:** (particularly on leadership and payroll deduction) and less on special events.

**Give Every Employee the Opportunity to Participate:** Ensure that all employees are being asked for their support (i.e., part-time, contract, unionized, management, support staff, shift workers, home-based workers, retirees, new hires, field employees, etc.).

**Regain Lapsed Donors:** If possible, Identify employees who did not donate last year, but did contribute in the past. Approach them and find out why they didn't contribute - it could be that they just weren't asked.

**Welcome New Donors:** Develop a special “welcome program” for new donors. This could involve a special “thank you draw for first-time donors”, a special thank you letter or a personal thank you from a long-time donor.

**Ask for 100% Return of Pledge Cards:** Request that all employees return their pledge cards whether or not they decide to donate. This will simplify tracking, help maintain confidentiality and likely result in some additional donations.

**Offer Early Bird Incentive Prizes:** This is a great incentive for donors to submit their pledge cards by a specified deadline. (One of the most popular incentives is a draw for time off work with pay or free parking for a specified length of time if employees generally pay for parking).

**Re-Canvass:** If you don't get the results you expected the first time around, then re-canvass employees using some of the techniques described in the Best Practices section of this guide.

**Implement a Participation Challenge** between departments, floors or locations within your organization, or challenge another organization within your industry/sector.

### Kick off and Canvas

#### Kick Off

It is very important that every workplace United Way campaign have a definite beginning and an end. Kick off can be an event, a publicity blitz, or simply something fun and out of the ordinary that signals the start of your campaign. Remember the kick off should be an awareness event, not a fundraiser. It can jeopardize the results of your campaign if it is used as a fundraiser.

Here are a few ideas that have been successful:

- Place a balloon at each employee's work station, along with his/her United Way pledge form, a United Way information brochure and some key facts about your campaign (i.e. goals, canvassing dates, special events, etc.).
- Position senior management at each entrance to greet people and hand out free coffee/balloons as people come into work.
- Hold a pancake breakfast or barbecue lunch where senior management/union executives act as celebrity chefs. Try to get all ingredients donated and provide food to employees for free.
- Hold group meetings to introduce the campaign and show the United Way video. Hand out free bags of popcorn as people enter the sessions.
- Invite a United Way Speaker from our Speakers Bureau program to present on the life changing impact of United Way and its' Partner Agencies in our community.
- Launch a publicity blitz. Mobilize a team to display posters, thermometers and any promotional material in prominent places throughout your organization.
- Send out an endorsement memo to all employees from your CEO, President, etc. outlining the highlights of your campaign and asking for full support.

Whatever you decide to do for your kick-off, be sure that it reaches every employee and it is an event that is well-publicized and appeals to a broad range of your employees.

## Canvassing

An effective canvass is the single most important element of your campaign. Whether you canvass each employee individually or hold a group canvassing session with one on one follow up, it is important that each employee be approached individually and followed up with!

Canvassing should have a definite time frame with a fairly short turnaround (1-2 weeks) and should take place before any special events. Having a strong reporting and monitoring system in place will help you track your progress and allow you time for planning a re-canvass if goals are not met.

### The Ask

#### Types of Asks

Make your own donation first – it is much easier to ask others to give when you have done so yourself! Begin by canvassing people you know; it is a great way to get comfortable with the ask and build your confidence.

Here are approaches for canvassing:

#### One to One

A canvasser personally connects with a fellow employee. When employees are asked to contribute by a peer, it is more meaningful. Peer canvassing is advisable at every level of the organization and is preferable where employees are spread over a large area and it is difficult to get everyone together.

#### Group

Pledge forms are distributed following a presentation, an effective and efficient method, ensuring everyone receives the same message. Your canvasser team still has a one-to-one role to play in these situations by encouraging employees to attend all presentations and following up with those who were not present.

#### Combination

Similar to a group canvass, a presentation is held but pledge forms are not distributed, allowing Canvassers to perform a one-to-one follow-up with each employee. Canvassing should be done immediately following the presentation.

#### Mail

Pledge forms are distributed by mail. While the personal approach is the most effective method of canvassing, certain work situations (i.e. field workers and retirees) necessitate the use of a mail approach to effectively reach all employees. Experience shows that the most effective mail solicitations are conducted as a separate communication and not included in pay envelopes. Many campaigns incorporate a personal phone call to follow-up on outstanding donations.

### Sample Ask

**The number one reason people do not give is that they were not asked! Make sure every employee was asked to participate, face to face when possible.**

Know your campaign details:

- When is your campaign beginning/ending
- Tell them about the exciting events the internal United Way committee has planned
- Share your campaign goal

Be prepared for questions and concerns

- Familiarize yourself with UWP and our work
- Arm yourself with our FAQ (included in this guidebook)
- If you don't know the answer or are not comfortable answering the question, offer to get back to them and send along the question to your UWP staff support. It's ok not to know!

Make the ask

- Find out their interests and connect them to United Way
- One on one and peer to peer is the best way to ask

**Tips for making the ask**

- Be positive  
A smile can go a long way
- Ask co-workers you know first  
Start by approaching the people you're most comfortable with first. You'll gain confidence and be ready to approach those you don't know well after
- Highlight the important of each gift  
Talk about the impact of each individual's gift and the difference it makes in the community
- Mention the ease of giving  
Encourage giving through payroll. Emphasize how their gift can be spread over specific pay periods. Tell them that their payroll gift is recorded on their T4 so it's easy at tax time.
- Contributing is voluntary

### SAMPLE ASK

"I just wanted to come by and drop off this United Way pledge form and some information about some key United Way-supported programs that are happening right here in Peterborough City & County!

Your gifts make a difference right here in our neighbourhood. To help the most people, we are striving for GOAL (amount or participation level).

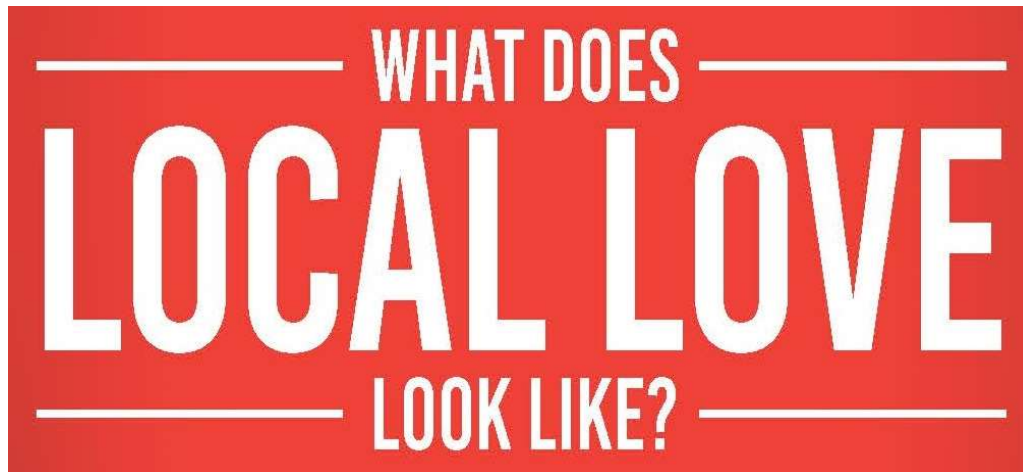
If you have any questions about United Way please let me know. Thank you for your thoughtful consideration to pledge this year!"

Share your enthusiasm and be a resource to help your co-worker make an informed decision about giving.

Tips for promoting pledge card giving:

- Create 'passport' to all events for those who return pledge form early
- Reserved parking spots
- Lunch in the boardroom with the CEO
- Company promotional items
- Extra break/ shortened work day/ Friday afternoon off
- Free oil change
- Free assistance with personal income tax preparation from your accounting department
- Birthday vacation day
- A travelling trophy that goes to the department with the highest participation
- Dress down days
- Provide certificates for free coffee for a week
- Provide certificates for a free meal if an in-house cafeteria is available
- Spring cleaning or housekeeping service coupon
- A "make your own ice cream sundae" party
- Trade your job with the senior manager of your choice for a day
- Hand out pledge cards at the kick-off and encourage return of the pledge card at the end of the event to be entered into a draw for a prize. A donation must not be required in order to be eligible for the draw
- Encourage all staff members to submit their pledge form even if they are not donating to ensure that the organization can get an accurate sense of their participation rate
- Create visual representation recognizing people who have donated. The visual recognition encouraged other employees to make a donation

\* Where the donor received an item, privilege, or other benefit in return for a donation, the value of the benefit may not exceed the lesser of \$75 or 10% of the donation amount. For more information, visit [cra-arc.gc.ca](http://cra-arc.gc.ca).



## Special Events

Special events create excitement and awareness for your campaign. They are a good complement to your campaign but should never be a replacement for pledge form canvassing.

Some things to consider when planning a special event:

- What would we like to accomplish with this event? Raise money? Raise awareness? Boost employee morale?
- Have we tried this event in the past? Was it successful? How many employees participated? How much money did it raise?
- What is our financial goal for this event?
- How much time will be required to organize the event? What other resources are required, i.e. money, equipment, volunteers, etc.
- Who will organize the event?
- Where will the event be held?
- How will the event be publicized?
- Is special approval or a license required?
- Is a back-up plan or rain date required?

Special events should take place after the initial employee canvass because small donations at a Special Event (a \$2 cookie at a bake sale) should not replace pledge form donations (\$2/pay).



## Special Events – putting the fun in *fundraising*

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.

<b>Agency Speaker</b>	Arrange for a member of United Way's Speakers' Bureau to attend a departmental meeting or coffee break. Most presentations take about 10 minutes and it's a great way to learn about our community.
<b>Agency Tours</b>	Arrange for your workplace committee, canvassers or small groups of employees to tour United Way agency partners see first-hand the work they do in our community. Tours take as little as 30 minutes.
<b>Auctions (Services)</b>	Auction your employees' special talents as prizes. Guitar lessons, cook dinner, valet parking, or buying & delivering coffee everyday for a week for example.
<b>Auctions (Silent/Live or Email)</b>	Employees and/or departments and/or union locals can donate baskets or prizes to the auction. Employees write their bid on a bidding sheet (Silent/email), or have a Guest Auctioneer and use paddles to bid (Live).
<b>Bake / Book / Garage Sale</b>	Always fun to shop! All proceeds donated to United Way.
<b>BBQ Lunch or Breakfast</b>	Executive Chefs serve breakfast or lunch to kick off your campaign. Arrange for someone from United Way to come and join in the fun.
<b>Bowling</b>	At the end of the hall or playing the real thing.
<b>Carnival / Mardi Gras /Vegas</b>	Employees pay to play a variety of games and/or they can win "starter" chips with every \$5, \$10, etc. pledge made.
<b>Car Race / Horserace</b>	Build a large display of a racetrack with cars or horses representing each department. Cars/horses will advance around the track as dollars and/or participation rates increase in each department.
<b>Car Wash</b>	Executives and volunteers wash cars in the company parking lot over the lunch hour to maximize employee participation. Charge a flat minimal fee.
<b>Casual / Jean Days</b>	Charge a donation fee to wear jeans on Friday or free when you return your pledge form.
<b>Celebration</b>	Hold a Celebration at the end of your campaign to thank all your volunteers and donors and celebrate your success!
<b>Chili Cook-off</b>	Co-workers compete for bragging rights for the best chili! Charge a small fee per bowl and include rolls for lunch.
<b>Coffee Cart</b>	Executives and/or Canvassers hand out free coffee and/or donuts as they distribute pledge forms and brochures. This event is great for workplaces that employ shift workers or those who can't leave their desk for traditional events.
<b>Cookbook</b>	Compile a cookbook of employee recipes and sell to raise money for United Way.
<b>Crossword Puzzle</b>	To create awareness, generate a crossword puzzle using clues and answers from United Way's website. Award small prizes to the person who answers all questions correctly.
<b>Dance Lessons</b>	Talented employees offer to teach dance, yoga or aerobic lessons for a small fee with all proceeds to United Way.
<b>Day of Caring</b>	Help out at a United Way agency during the week or on a weekend. Jobs may include painting, building a fence, planting gardens, BBQ's, etc. These can be arranged by United Way.
<b>Dress Up Days</b>	Wear RED for United Way or dress according to a specific theme to build energy and excitement.
<b>Dunk Tank</b>	Employees pay a small fee to dunk their favourite Executive! Yes, you can rent Dunk Tanks!
<b>Elevator Toll</b>	Charge a toll for anyone using the elevator on a particular day of the campaign. Hand out "tickets" with United Way facts to create awareness while raising money at the same time.

<b>Jail &amp; Bail</b>	Employees pay a small bail to free their favourite Executive from "jail"! Advertise all proceeds to United Way.
<b>Lunch</b>	Executive Chefs serve lunch to kick off your campaign.
<b>Lunch &amp; Learn</b>	Leading up to your campaign, offer free information sessions during the lunch hour. Arrange for an Agency Speaker to present. Encourage employees to bring their own lunch.
<b>Office Olympics or Mini-Golf</b>	Schedule noon hour events each day during your campaign to promote team spirit and encourage inter-departmental competition. Charge a flat fee per team and donate proceeds to United Way.
<b>Piggy Bank Challenge</b>	Groups decorate piggy banks. Have a best dressed pig competition or fattest pig with the most dollars. Piggy banks then used for employees to drop-off their change during campaign. Alternately, have collection jars beside cash registers or vending machines and collect donations all year long.
<b>Pie Throwing Competition</b>	Pay to throw a pie in your favourite Executive's face!
<b>Pizza Night</b>	Free pizza for that 2 am shift. Arrange an Agency Speaker to raise awareness (yes, even at 2am!).
<b>Potluck Lunch</b>	Promotes team spirit.
<b>Scavenger Hunt</b>	Schedule during the noon hour to promote team spirit and encourage inter-departmental competition. Charge a flat fee per team and donate proceeds to United Way.
<b>Shoe Shine</b>	Executives shine shoes in exchange for a small donation.
<b>Spelling Bee</b>	Employees vs. Management. Use United Way words (messaging, agency names, etc.), to create awareness and promote team spirit.
<b>Talent Show / Karaoke</b>	Encourage employees to compete for the title of "Workplace Idol". Executives or Local Celebrities can guest judge.
<b>Themed Events</b>	Coincide your campaign and/or event with the current season or holiday (Back to School, Thanksgiving, Halloween).
<b>Trivia</b>	Include questions about United Way and your own workplace campaign to create awareness. Award a prize to the person who answers all questions correctly.
<b>Ugly Sweater Day / Ugly Tie Day</b>	Employees can vote on their favourite (or "ugliest"), use as a fun event.
<b>Video Game Tournament</b>	Individuals or teams pay to play faves like Guitar Hero, Rockband and Wii Olympics. Teams can dress the part.

Offering free admission, charging a *minimal fee* for special events is a great way to ensure employees still have the capacity to support the annual campaign and help you reach your goal.

Better yet, why not use the donor's completed pledge form as an entry ticket to a special event!

### Nickel-and-dimed vs. pledge-based

**Nickel-and-dimed:** Betty pays \$5 to enter a Jays game draw, \$8 for raffle tickets, and \$2 for dress down Fridays. Since Betty has already made 3 donations she does not submit a pledge form.  
Total donation = \$15

**Pledge-based:** Betty fills out her pledge form to get an All Access Passport, which includes an entry into the draw, 5 raffle tickets, and access to dress down Fridays. Betty pledges \$1/day = \$365 gift and freely enjoys all the fun

**Extra impact for our community = \$350!**

## Wrap Up, Recognition and Evaluation

### **Wrap Up and Recognition**

Just as the beginning of your campaign was marked by a kick-off, the end should be signalled by a wrap-up.

Your wrap-up should:

- Announce the end of your campaign
- Communicate your campaign achievements (dollars, participation, etc.)
- Thank donors and recognize your campaign volunteers

You can mark the wrap-up of your campaign in a variety of ways.

Here are a few suggestions:

- Hold a wrap-up meeting for all employees to announce results and thank participants. Arrange to have a cheque presented to United Way. Take a photo for your employee newsletter.
- Hold a wrap-up reception in a central location (if your workplace has multiple locations). If you have an executive boardroom or dining room which is not widely accessible to employees, try to hold the reception there as a “perk”.
- Organize a wrap-up ceremony in your cafeteria/lunchroom during peak period. Invite all canvassers and senior management/union leadership. Distribute canvasser certificates at that time.
- Print a special Campaign Newsletter to announce your results and recognize volunteers, sponsors etc. This is a great opportunity to include any photos taken during the course of the campaign.

### **Debrief/Evaluation**

It is important to reflect on what worked and what didn't at the end of your campaign. We are happy to facilitate and take notes at a debrief session.

# Celebrate your campaign results!