Workplace Campaign

Campaign Booklet for Workplace Ambassadors

UNITED WAY FOR HALIBURTON KAWARTHA LAKES

Workplace Campaign Kit

Thank you for being a United Way Ambassador and making a difference in your community through United Way for Haliburton Kawartha Lakes. Yes, that's right, we've changed our name! This new name better reflects the area that we serve. The role of Campaign Ambassador takes planning, purposeful communication, and time. Each workplace is unique and although we will provide best practices to follow, you will probably need to customize your Campaign to meet your workplace's needs. Find material to help with your campaign on our website: **https://hkl.unitedway.ca/workplace-campaign-toolkit/**

This guide makes planning and executing a workplace Campaign simple. Get ready to begin recruiting your team, planning your inspirational Campaign and ultimately celebrating your lasting impact in our community. Remember, your United Way staff contact is with you every step of the way. Reach out to us! We'd love to hear from you.

For more information, or to invite someone from United Way HKL to speak to your organization, please contact **Shantal Ingram, Co-Executive Director, at shantal@hkl.unitedway.ca**

Running a Successful Workplace Campaign: Role of the Ambassador

Ambassadors are key to the success of every campaign. You are the frontline volunteers who will approach your peers in the workplace to raise awareness about United Way's vital role in the community.

You will provide your colleagues with an opportunity to make an informed choice about charitable giving by doing these three simple things:

1) Engage

- Explain to your colleagues the benefits United Way brings to our community (i.e. “the impact” or “why”).
- Describe how a donation to United Way provides flexible, stable funding that supports a diverse network of social service agencies and programming across the community (i.e. “the strategies” or “how”).
- Promote how their contribution will make a difference.
- Promote your campaign and and any activities or special events you host.
- Invite your United Way Representative to share the needs of the community, their work and the impact of United Way.

2) Ask

- Ask your colleagues if they would like to support the work of United Way by making a donation.
- Collect completed pledge forms or direct employees to your online giving page.
- Follow up by answering questions and visit colleagues who were absent or undecided.

3) Thank and Celebrate!

- Thank your colleagues for their time and participation.
- Send out personalized thank you cards or emails.
- Celebrate your achievements with the team!

4 Steps to a Successful Workplace Campaign

1. **PREPARE**
2. **ENGAGE**
3. **ASK**
4. **THANK**

1. **Prepare:**

Connect: Connect with your United Way Staff Contact - your most valuable resource to help you with your Campaign. Together, review campaign results from previous years, strategize and brainstorm, and begin to develop a plan for the upcoming Campaign. Plan for a campaign that resonates with your team and what's important to them.

Recruit and Train Your Campaign Team: Now it's time to recruit your United Way Campaign team. Recruiting individuals from different departments, levels, and locations is key, take the time to learn about your community needs and how United Way helps support community strategies to end complex issues like homelessness and poverty.

Plan Your Campaign: Having a plan is vital for a successful Campaign. An impactful Campaign timeline, a communication strategy aimed at inspiring and mobilizing employees, and a detailed work plan all make running a successful campaign easier.

Kick off Your Campaign: Launch your campaign (consider a kick-off event) and inform your colleagues about activities, incentives, and goals. Invite workplace leaders (CEO, President, GM, Labour Leaders, etc.) to speak and endorse the campaign. Include informative presentations, impact speakers and awareness messaging to help colleagues understand the local need and the incredible impact they can have with their investment.

4 Steps to a Successful Workplace Campaign

2. Engage

Engage your colleagues in a variety of ways including:

United Way HKL Events and Activities: United Way HKL engages our community through various events and activities. Having your workplace take part in one or more of our activities can enhance your Campaign. Reach out to your United Way Staff Contact to learn more about upcoming events or activities, such as team building opportunities at Edwin Binney's Community Farm and Education Centre.

Workplace Special Events: From trivia to chili cook-offs, Workplace Special Events are a great way to create awareness, energize your workplace, provide team building opportunities and highlight community issues. They can be used to raise money, but more importantly, they create momentum for your annual United Way Campaign. See page 8 for more examples of fun events to run at your workplace.

Impact Speakers: There is no better way to understand the United Way programs at work in HKL and/or Haliburton than by having an Impact Speaker share their story. Your team will be immersed in the work that United Way's partner agencies do to create long lasting social change and gain a better understanding of United Way. Learning how we collaborate with volunteers, donors, organizations and others to make a difference for thousands of people in our community and truly understand the impact of their investment. Seeing is Believing Tours can also be arranged to visit United Way HKL's Edwin Binney's Community Farm and Education Centre or one of our partner agencies. Connect with your United Way Contact to learn more about available opportunities.

3. Ask

What's your why?: Before you make an ask, it is important to ensure you can explain why the United Way is important to you and your community. If you have a personal reason for volunteering to be a United Way Champion, sharing your 'why' will inspire others to reflect on their own reasons for giving. If you aren't comfortable sharing a personal 'why', you can use the stories of community members found in our campaign materials to help you prepare what you want to say.

Know your ASK: Be specific and be genuine! Work with your United Way Staff Contact and your committee to determine your ask. For different workplaces or different departments, the ask may need to come from a specific person or utilize specific language to have the most impact. Remember that when asking for donations to United Way HKL, you are helping those who need it most, connecting them to the resources and support they need to thrive.

4 Steps to a Successful Workplace Campaign

Try phrases like: “Join me in giving back to our community, to have meaningful impact where it’s needed most." “Did you know? $5 per pay for a year, is enough to provide a child with well over 100 nutritional snacks to help them engage and learn in school."

Leadership Giving: With a donation of $1,200 or more, our Leadership level donors are ready to drive change, willing to set a powerful example and become part of the solution to our community’s complex social issues. Leadership Giving is an essential part of United Way Workplace Campaigns and it is important to raise awareness about this incredible giving opportunity. United Way Leaders are passionate about leaving their mark on CKL and Haliburton by creating lasting change.

Grow Your Leadership Giving Program

• Host a Leadership event and invite a United Way Leadership speaker. Do you have any Leadership donors on staff? Ask them to follow-up with event attendees.

• Provide special incentives like giving a day off work for new donors giving at the Leadership level or increasing their Leadership gift by 10% over the previous year.

• Recruit a Leadership chair for your campaign committee to grow your Leadership donor program, by arranging your Leadership presentation, monitoring Leadership giving results, making personal outreach to ask for support and ensuring donors are thanked and recognized.

Payroll Giving: Many workplaces participate in the payroll deduction program, which allows employees to opt to deduct a regular amount from each paycheck to fulfill their annual pledge to United Way over the course of the year. Payroll deductions begin the following January and their donation will show up automatically on the employee's T4 at income tax time. Different workplaces use different tools to collect these pledges—both online and paper pledge forms. Employees can also make a one-time gift through payroll giving. It provides a convenient and manageable way for employees to give. If there is an opportunity to offer incentives, such as prizes, for employees to sign up for payroll giving, that may help motivate them to take action and donate!

Corporate Matches: A number of workplaces offer a Corporate Match for the gifts made by employees through the workplace Campaign. If your workplace offers a match, this can be an important part of your ask as it can increase and enhance the impact of each donor’s gift.

4 Steps to a Successful Workplace Campaign

Follow Up: Track your progress and follow up with your donors. Sending company-wide communications may be useful when providing updates on goals, but you may need to connect directly with your colleagues to support them in giving. They may be confused about how to give or have other questions they were too afraid to ask. Work with your United Way Staff Contact to determine who has given and who may be outstanding.

Addressing Questions: Making a decision on charitable giving can be a challenge for some individuals. They may have questions and as the one who made the ask, it will be up to you to answer them. Please refer to our FAQ document for support. If you still require clarification, don't hesitate to connect with your United Way Staff Contact.

You can also learn more about how donations are distributed and how they are used by visiting ckl.unitedway.ca.

4. Thank
Celebrate Success
Your Campaign is complete and it’s time to celebrate!

Show Impact: Now that you have reached the big finale, we recommend that you share the final total fundraised along with the impact that donations will have in our community with your workplace. Work with your United Way Staff Contact to help put faces and stories next to the dollars raised, to truly understand the difference you've made in your community!

You might consider including the following in your wrap-up event:
• Video/ Slide Show of your Campaign activities
• Cheque Presentation
• United Way Video

Show Appreciation: It is important to say thank you to all those who have donated or were involved in your campaign. Personalized letters, emails, or in- person/video thank yous are all great ways to let them know they are appreciated. Your United Way Staff Contact has resources available to help assist with this should you need guidance.

4 Steps to a Successful Workplace Campaign

Reflect: Before closing the book on this year's Campaign, gather your committee together for a debrief meeting. Engage in dialogue about your Campaign in order to prepare and inform next year's committee. Invite your United Way Staff Contact to this meeting so they can begin preparing to support your next Campaign.

What went well? What would you change? What's something new you want to try next year?

Thank you for being an amazing Ambassador!

TIPS:

• The number one reason people don't give is because they were never asked - be sure to ask and include the importance of how the community benefits from their support.

• Be yourself. Your enthusiasm and commitment will motivate others to give.

• Be fearless! You are not asking for yourself - you are asking for the community. Remember that lives are being changed because of you!

Special Event Ideas

Challenge-style Events:

Create some excitement in your workplace and draw up challenges or a competition with your peers. Challenges should have a level of difficulty associated with them - people are more likely to sponsor you to run a 5km vs. walk around the block.

You can choose to fundraise for challenges in different ways:

• Get a senior leader in your organization to commit to eating meals that consist only of food available at a foodbank.

• Out of the cold challenge

• Crowdfunding 24 hour fast

• Live Stream fundraising day across community/workplaces

• 1 week food bank challenge

• "A-thon" type of event

• Play video games, board game, lawn games, etc. for 12 hours straight

Special Event Ideas

Health & Wellness Themed Events:

Keeping healthy is an important priority for all of us. Team up with your health and wellness committee to run an event together. They might have some budget to use for prize incentives, or to make a gift directly to your fundraising event.

• Run/Walk/Roll

• Set a course and have staff compete against each other to see who can complete it the fastest, or the slowest!

• Creative fitness!

For example, for every $10 raised, you commit to…

• Push-ups, sit-ups, squats, jumping jacks

• Laps around a popular spot in the city

• Km on your indoor fitness equipment

• Zumba/dancing

• Hiking

• Laps of your pool

• Video game Sport Tournament

• Wii tennis

Other Event Ideas

• No-Gala Gala

• Enlist a band to volunteer, dress up (or wear your PJ's) and enjoy the evening!

• Add on an online auction or bidding activity for additional revenue

• Trivia

• Cooking Lessons

• Master Chef Event– cook meal and deliver to highest bidder/employee gift within the hour

• Virtual Escape Rooms

• Pay to play bingo (caller announces via email)

• Online card tournament (e.g. Euchre)

• Game show

• Drive-in movie night

• Online Auction

• Contests, Raffles, 50/50, Gift baskets, Day(s) Off, Key to a box with prizes

• Wine/Gift Card Survivor

• Community Webcast

Promoting your fundraising efforts to your network

An easy way to promote your peer-to-peer fundraising events is by using your social media!

Here are some tips and tricks to help you reach your fundraising goals leveraging your social media:

• Social Media/Digital Communications Platforms: Instagram, Facebook, Twitter, TikTok, LinkedIn, E-mail

• Always include your personal fundraising page link and add it to the bio on your profile

• Include personal pictures to catch people's attention in their social feeds

• Be mindful of your tone depending on the social media platform (casual on Instagram vs. professional on LinkedIn)

• Use the messenger function on the platforms to let your network know what you are participating in and that you are raising money

• Post on multiple fundraising platforms and don't be afraid to use your stories!

• Tag UWHKL and include #LocalLove

Incentives

Behaviors to Incentivize:

- Increase giving by a certain percentage or a set number of dollars per pay period.
- First-time United Way donors of a set number of dollars per pay period.
- Increased donations to United Way since the previous year.
- Returning a completed pledge form for any amount.
- Note: Setting a 100% participation goal is noble but not always practical or achievable. United Way suggests setting goals based on the previous year's results. For example, '5% increase in donors over the previous year'.

Sample Incentives to Offer (be sure to get permission/approval from managers):

- Golf game with senior management
- Oil changes
- An extra paid vacation day
- Cash prizes
- An extra 30 minutes for lunch
- Prime parking spot
- Celebratory lunch
- Mugs, pens or other swag
- TV or stereo equipment
- Computer software
- Casual dress days
- Tickets to movies or live theatre
- Gift cards for movies, coffee or restaurants
- Office gear your company doesn't need but is still in good working order

Thank you for volunteering your time to canvas your colleagues.

By asking for donations to United Way, you will help people who need it most, connecting them to the resources and supports they need to thrive.

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