



**United Way**  
London & Middlesex  
Change starts here.

# Employee Campaign Coordinator Guide

[uwlondon.on.ca](http://uwlondon.on.ca)

Give. Volunteer. Act.



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# Introduction

## Who we are

### **United Way creates real, lasting change**

Locally driven and governed, United Way is a non-denominational, registered charity dedicated to improving the quality of life of all people in our communities and helping individuals, families, neighbourhoods and communities reach their full potential.

United Way is a leader in understanding the root causes of social issues and bringing together the people and resources to find lasting solutions. United Way is creating real change in people's lives - meaningful, positive, lasting change. Not just for today, but for the long term. And that means a better community for us all. Inspiring people to come together, we have the power to make a real difference, in people's lives and in our communities.

## How we help

### **United Way improves lives and builds potential**

United Way improves lives and builds potential by bringing together community leaders to identify needs, find solutions and take action. We strengthen non-profits with training for volunteers and staff. We coach youth to be active in shaping their community.

Working together we build an organized safety net of core community services for people in immediate need. We get to the root causes of community issues in order to build solutions for the long-term. And we build the momentum towards fundamental change for our society through education and advocacy.

## How you can help

### **Invest in real change**

Each contribution to United Way is an investment in making real change: in real people's lives and in our community. When you give to United Way, you are achieving greater impact by combining your support with others. This approach enables us to make major investments in programs and services that provide proven results for our community.

When you give to United Way, your donation:

- Stays in London and Middlesex County
- Achieves impact
- Guarantees cost-efficiency
- Consolidates your charitable contributions
- For companies, demonstrates corporate citizenship
- Involves many in shaping our community

## **WELCOME TO THE TEAM!**

Thank you for your generous assistance in chairing the United Way campaign in your workplace. You are helping to ensure opportunities for a better life for everyone through a community where everyone matters.

The majority of funds raised each year come from the support of people just like you, running workplace campaigns and inspiring the generous support of employees to participate.

### **Employee Campaign Coordinators**

Employee Campaign Coordinators are selected to lead the United Way Campaign in their organizations. They recruit help, create a campaign, arrange special events and report to their CEO/senior manager/labour leader on the success of the campaign. Their efforts are supported by United Way staff and Sponsored Employees.

#### **Role of the Employee Campaign Coordinator (ECC)**

- Engage as many employees as possible in United Way and the community and maximize employee giving in the organization
- Bring together the necessary people and resources to plan and implement a successful campaign
- Have fun!

#### **Responsibilities**

- Learn about United Way and recruit a campaign team (1-8 people)
- Secure support and maintain direct contact with senior management/labour leaders and United Way
- Analyze and develop a campaign plan
- Educate volunteers and coordinate campaign
- Kick-off and canvass
- Report campaign progress and final results to United Way
- Problem-solve during employee campaign
- Run special events and wrap-up
- Thank donors, canvassers/volunteers and team members
- Participate in a final evaluation of the campaign

#### **United Way Resource Development Managers**

Your United Way Resource Development Manager can be reached by calling 519-438-1721. You can also contact them by email through the United Way website: [www.uwlondon.on.ca](http://www.uwlondon.on.ca).

### **Planning your United Way campaign**

As you begin to plan for the United Way Campaign, we want to ensure that you have the very best tools and information to help you. Here are some steps that are part of every successful workplace campaign.

## **Organize**

Organize your campaign with three phases: plan, execute and wrap up.

## **Objective**

To inform, ask and thank your colleagues.

### 1. Plan

- 1.1 Build your team
- 1.2 Learn about United Way
- 1.3 Analyze past campaigns
- 1.4 Develop a campaign plan
- 1.5 Plan a Leadership campaign
- 1.6 Take action

### 2. Execute

- 2.1 Inform
  - Build awareness
  - Kick-off
- 2.2 Ask
  - Canvass
  - Participate in community events
  - Run special events
- 2.3 Remit campaign envelopes

### 3. Wrap up

- 3.1 Thank donors and volunteers
- 3.2 Evaluate results against goals and strategies

# 1. Plan

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## 1.1 Build your team

### Objectives

- Share the work
- Build a campaign team that is reflective of your campaign

### Actions

- Start recruitment early
- Seek out past volunteers
- Leverage senior management and union leader support to rally new volunteers and resources for campaign activities like kick-off events and wrap-ups
- Use the committee descriptions to fill specific positions and help volunteers understand their roles
- Recruit canvassers or encourage your canvassing coordinator to do so

## 1.2 Learn about United Way

### Objectives

- Gain an understanding of United Way of London & Middlesex to build your own involvement and commitment
- Be able to motivate others to participate as volunteers and donors

### Actions

- Attend the Employee Campaign Workshop offered by United Way of London & Middlesex
- Invite someone from United Way to speak at your first committee meeting
- Organize an agency tour for your committee and canvassers
- Visit the United Way of London & Middlesex website – [www.uwlondon.on.ca](http://www.uwlondon.on.ca)
- Read the donor information brochure
- Read the guide you receive in training

## 1.3 Analyze past campaigns

### Objective

- Set realistic goals

### Actions

- Ask your Resource Development Manager for assistance (call 519-438-1721 or find their email at [www.uwlondon.on.ca](http://www.uwlondon.on.ca))
- Use your campaign debrief information from last year for one of your first committee meetings

#### 1.4 Develop a campaign plan

##### Objective

- Communicate a common objective to coordinate your team

##### Actions

- Decide how you will inform, ask and thank your colleagues
- Set financial and participation goals
- Identify tangible steps to achieve goals
- Consider other key dates (business activities, United Way of London & Middlesex events and competing charitable activities)
- Establish a timeline or critical path
- Share your plan with senior management and union leaders to obtain early buy-in

#### 1.5 Plan a Leadership campaign

##### Objective

- Grow this important group of donors through effective identification, cultivation, solicitation and recognition strategies

##### Actions

- Identify a Workplace Leadership Chair
- Determine how your campaign plan will work in conjunction with the Leadership campaign plan
- Attend Workplace Leadership Chair training offered by United Way of London & Middlesex

#### 1.6 Take action

##### Objective

- You and your team lay the ground work for a smooth-running campaign

##### Actions

- Schedule CEO and union leaders for kick-off
- Book rooms
- Secure incentives for volunteers and donors
- Order campaign supplies
- Schedule United Way representatives to give presentations
- Promote your upcoming campaign
- Build awareness of United Way of London & Middlesex, the issues in the community and the impact donations make
- Recruit and train canvassers

## 2. Execute

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### 2.1 Inform

#### Objective

- Inform your colleagues about the issues facing our community, the work of United Way and the impact that their donations make

#### Actions

- Kick off your campaign
- Provide awareness raising opportunities such as:
  - Presentations by United Way representatives
  - Agency tours - Community Impact Experiences
  - Information sessions
- Provide everyone with a donor information brochure
- Promote your campaign with United Way throughout your workplace using posters, intranet, email, etc.
- Run free special events that build awareness and morale

### 2.2 Ask

#### Objective

- Ask your colleagues to support the work of United Way of London & Middlesex to help make our community a better place for everyone to live and work

#### Actions

- Canvass - 1:1, peer to peer canvassing or group canvass
- Ensure that everyone receives a pledge card
- Ensure everyone is asked to support United Way
- Participate in United Way community events - 3M Harvest Lunch, StairClimb
- After the canvassing is complete, run fundraising special events

### 2.3 Remit campaign envelopes

#### Objectives

- Monitor your progress
- Securely handle funds
- Process payments quickly for donor convenience (credit cards, cheques and cash to receive tax receipts)

#### Actions

- As soon as pledge cards are returned, remit them to United Way
- As soon as special event funds come in, remit them to United Way

### **3. Wrap Up**

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#### 3.1 Thank donors and volunteers

##### Objective

- Recognize contributions and build loyalty – to maintain positive, life-long relationships with United Way of London & Middlesex

##### Actions

- Thank committee members, canvassers and other campaign volunteers
- Thank senior management and union leaders
- Thank donors
- Thank suppliers of incentive prizes
- Use vehicles that are effective for your workplace (parties, gifts, letters, email, presentations, newsletter articles) to communicate your thanks
- Attend United Way's Celebration in February

#### 3.2 Evaluate results against goals and strategies

##### Objectives

- Lay a foundation for an even more successful campaign next year

##### Actions

- Compare your results with the goals you set
- Identify what worked and what didn't work for yourself or your successor

#### **NOTES:**

## Two-week model campaign

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Off Campaign season (January to August) activities

- Run a newsletter item about United Way's work in the community
- Participate in Day of Caring (June). This is a great way to recruit campaign volunteers. You can share the stories and photos in your newsletter or website
- Attend the United Way Campaign Launch & 3M Harvest Lunch in September to find out the campaign goal
- Talk to your Resource Development Manager about other ideas that suit your workplace
- Attend an Employee Campaign Workshop prior to your campaign launch date

## Plan

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- 1.1 Build your team
- 1.2 Learn about United Way
- 1.3 Analyze past campaigns
- 1.4 Develop a campaign plan
- 1.5 Plan a Leadership campaign
- 1.6 Take action

**8 to 6 weeks before** your campaign starts

- Attend an Employee Campaign Workshop if you haven't already

**6 weeks before** your campaign starts

- Confirm CEO and Labour leaders availability for kick-off and wrap-up events

**3 weeks before** your campaign starts

- Start advertising campaign – let your workplace know the campaign is coming
  - Promote using: posters, email, intranet, notice boards, memos, etc.
  - Introduce your campaign committee members and canvassers
  - Let your workplace know about the incentives you will have available
  - Start building awareness of United Way of London & Middlesex – Impact areas of focus: Poverty, Mental Health, Beginnings and Transitions
  - Share stories from colleagues who have benefited from United Way funded programs and services
  - promote upcoming events at your workplace

**1 week before** your campaign starts

- train your canvassers – this may require more than one session depending on size of group
- provide awareness raising opportunities
  - Days of Caring, agency tours, guest speakers
- Continue campaign promotion
- Leadership campaign event (breakfast, lunch, wine and cheese, agency tour, etc.)

## **Execute**

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### 2.1 Inform

- Build awareness
- Kick off

### 2.2 Ask

- Canvass
- Participate in community events
- Run special events

### 2.3 Remit campaign envelopes

## **NOTES:**

## Week 1 – Your campaign

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### Week 1 – Inform

Start the week with a kick-off

- Timing – whatever works for your organization (breakfast, mid-morning break, lunch or afternoon break)
- 20 to 60 minutes depending on activities and time of day
- Offer food – it will get your guests in the door
- Build awareness – include a United Way representative or staff partner to motivate your guests to give. Their 5 to 10 minutes are highly effective!
- Share your campaign schedule

### Week 1 – Ask

- Start canvassing immediately after your kick-off
- Deliver a pledge form to each employee personally for best results
- Provide each employee with a donor information brochure to help them be informed about United Way of London & Middlesex
- Include an envelope with each pledge form so that employees/donors are able to submit their pledge form confidentially
- ASK – ask your colleagues to support the work of United Way of London & Middlesex to help make our community a better place for everyone to live and work, discuss the goals of your campaign, answer any questions and thank them for their time
- Give donors instructions on where to drop off pledge cards or how they will be collected. Encourage everyone to send back the pledge card whether they give or not
- Continue canvassing all week
- Update campaign thermometers (if applicable)
- Report on team/floor/department participation challenges
- Promote incentives. Have multiple early bird draws and/or draws for new donors, 10% increases, etc.
  - Incentives are used to encourage employees to hand in their pledge form right away
  - IT REALLY WORKS and saves you having to keep asking for pledge forms to be returned
  - Ideally, be able to offer multiple incentives (one for each day of the week); ask around the office and see if anyone can donate anything (day off, parking spaces; call suppliers/clients for donations, etc.)
  - Be sure to announce your winners

NOTE: Hold off on fundraising special events until the majority of your pledge card donations are complete.

## Week 2 – Your campaign

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### Week 2 – Ask

- Continue canvassing. Re-canvass anyone who has not returned a pledge card/completed their link
  - Keep following up in creative ways to make sure all of your pledge cards are handed in whether they are filled in or not
  - Send email reminders, hang posters, voicemail reminders, remind people at events or whatever works in your office
  - Thank everyone who has given and returned a pledge card
- Remit campaign envelopes
- Continue to update campaign thermometers (if applicable)
- Continue to report on team/floor/department/participation challenges
- Run some fun fundraising special events
  - They can be big or small but should not take place until after the first week of canvassing is complete!
  - You can have them every day or just a few. The goal is to get your employees involved, raise more money and have some fun while you are doing it

Here are some ideas that can be used in any size office:

- 50/50 draws
- Auction (live or silent) and raffles
  - Employee skills (bake a cake, clean someone's car or desk, buy breakfast, golf lessons, etc.)
  - Items (raffle VIP parking spots, trips, electronics, etc.)
- Contest
  - Minute to Win It
  - Wii tournament
  - Worst/best tie
- Balloon pop – sell balloons with prizes inside; pop the balloon to see what the paper inside indicates you've won
- Food-oriented events (candy-grams, chili lunch cook off, ice cream social, build your own sundae)
- CD & book flea market – have everyone bring in books and CDs they no longer use and sell them cheaply. Everyone wins!

### Week 2 – Thank

- Campaign wrap-up party with volunteer and donor recognition announce results, announce prize winners for early bird draws and other incentives
  - keep it simple
  - offer food (order a cake, cookies, etc.)
- Thank everyone for participating
- Announce dollars raised to date
- Announce winners – team participation challenge, early bird draws, etc.
- Have the final prize donated – such as: two Leafs tickets from the President, two airline tickets anywhere in North America by using the company's corporate Airmiles from business travel over the year, ask your clients to donate a prize, etc.

Remit campaign envelope

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## Wrap Up

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3.1 Thank donors and volunteers

3.2 Evaluate results against goals and strategies

### Sponsored Employees

One of the most valuable resources to an ECC is a Sponsored Employee. Sponsored Employees are individuals who are “sponsored” by their organizations to work with United Way on a full-time basis during the four months of the Campaign. They are your primary link to United Way and act as an extension of United Way staff to provide guidance, support and customer service. To find out who your United Way Sponsored Employee or Resource Development Manager is, call 519-438-1721.

## Campaign or organizational leadership support

Every ECC should have resources and help available to coordinate a successful campaign. In order to do so, your campaign needs support from senior management and union leadership.

You should endeavor to secure the following from senior management and union leadership:

- Endorsement for the campaign – this includes approval of release time for volunteers, appointment of a Leadership Chair, approval of the employee campaign plan and goals, and possibly written endorsement to all staff introducing the campaign and asking for support
- Visible presence at campaign events – this includes group information sessions and special events
- Financial support – both on an individual basis as donors to the campaign and to provide a reasonable campaign budget

Tip: Approach key individuals early in the planning process to secure their commitment. Be clear and concise in your requests and outline exactly what role you would like them to play.

## Running a Leadership campaign

In most organizations, a member of the senior management team is recruited to act as the Leadership Chair. This individual coordinates a special approach to his or her colleagues that involves a presentation and request for donations at the Leadership level (gifts of \$1,000 or more). The Leadership giving campaign should ideally take place approximately a week or two prior to the employee canvass, thereby setting the pace for the campaign.

### How to organize a Leadership giving campaign:

- Appoint a Leadership Chair
- The Leadership Chair may wish to recruit canvassers to help approach the Leadership donors and prospects
- Conduct Canvasser training for the Leadership Canvassers – or include them in canvasser training for the employee campaign
- Develop a list of employees who will be approached for Leadership gifts. This list should include past Leadership donors, current donors who give between \$500 and \$999 (Friend donors) and those who have not given in the past, but may have the potential. Speak to your Resource Development Manager for guidelines as to titles and or salary ranges
- Obtain Leadership material from United Way (pledge cards, brochures, etc.)
- Organize a Leadership Presentation and request a Leadership speaker from United Way. Leadership presentations can take place during a regularly scheduled management/staff meeting or at a separate event
- Canvass Leadership donors and prospects
- Track Leadership giving separately within your campaign
- Send personalized thank you notes to all Leadership donors
- Hold a Leadership reception so all Leaders and prospects can learn about the impact of their contributions

For more information about Leadership giving, please contact your Resource Development Manager at United Way.

Tip: Leadership giving will not only increase the average gift within your organization, but it will boost participation because it ensures that all senior employees are properly canvassed.

## Campaign committee and canvassers

No two campaign teams at workplaces across London and Middlesex County are alike. Your Committee may involve thirteen people or only three. We recommend that your team have:

- Representation from each area/department/location of the organization
- Specific roles for each committee member
- The appropriate skills and commitment to complete their assignments effectively and on time

A sample campaign committee is likely to have the following positions:

- Campaign Chair(s)
- Finance Coordinator
- Canvasser Coordinator
- Leadership Chair
- Labour Representative (for unionized workplaces)
- Communications Coordinator
- Recognition Coordinator
- Special Events Coordinator
- Campaign Secretary
- Retiree Chair

When your team is in place, be sure to hold a committee orientation session to ensure that everyone is educated and motivated.

## Canvassers

The Canvassers are your “front line” volunteers – acting as ambassadors for the campaign and helping employees make informed decisions about charitable giving.

A Canvasser should be able to:

- Explain what United Way does and why it is important
- Outline campaign timetable, prizes and events
- Request donations from co-workers
- Provide United Way agency information
- Answer questions and thank donors

For a step-by-step guide to canvassing, please contact your United Way Sponsored Employee or Resource Development Manager.

## Giving guidelines

How much should I give? Many donors and potential donors ask this question. Every decision is a personal one and the best response is to suggest guidelines from a few perspectives.

- Donate one hour's pay per month (to calculate this conveniently, multiply your annual salary by 0.00065)
- Donate the equivalent of a coffee break (15 minutes) per pay period or the cost of a cup of coffee per day
- Match the average donation in your organization
- Increase your donation from last year by one or two dollars per pay period
- Donate 1% of your annual salary

## United Way tax tip

TAX TIP	United Way issues charitable tax receipts that will reduce your federal and provincial income tax. For example:			
	INCOME RANGE			
		\$40,970 to \$81,941		above \$81,941
Your gift of	Total tax savings	Actual cost to you	Total tax savings	Actual cost to you
\$100	\$20.05	\$79.95	\$22.88	\$77.12
\$200	\$40.10	\$159.90	\$45.76	\$154.24
\$500	\$160.58	\$339.42	\$184.98	\$315.02
\$1,000	\$361.38	\$638.62	\$417.03	\$582.97
\$5,000	\$1,967.78	\$3,032.22	\$2,273.42	\$2,726.58

As of 03/11



## United Way Impact Areas

United Way continually assesses community needs to ensure that our funding meets the most urgent needs. United Way of London & Middlesex has defined three **beginnings & transitions**. These impact areas are based on extensive community research and approved by the Board of Directors, guide United Way's work in resource development and mobilization.

### Poverty

Supporting urgent needs and promoting independence and long-term financial stability

#### Why focus on poverty?

- 17% of families in London live below the Low Income Cut Off. 46% of single parents and 51% of immigrants live below the Low Income Cut Off
- One in five children in London lives in poverty
- Average number of homeless people in London – 1,500; available shelter beds – 360

#### Impact of your gift

- Your \$85 provides an individual living in poverty with a full year of weekly meals in a safe setting with access to mental health counselling, support workers and a public health nurse
- Your \$100 enables a senior living below the poverty line to receive subsidized meals for one month
- Your \$500 meets the urgent needs for 50 at risk or homeless youth

### Mental health

Promoting healing, resilience and recovery for individuals living with mental health issues

#### Why focus on mental health?

- One in five of us will experience a personal mental health issue during our lifetime
- 40% of homeless shelter users in London present with mental health and addiction issues
- It is estimated that addictions cost our community more than \$240 million per year in health care, law enforcement, social assistance and lost productivity

### **Impact of your gift (mental health)**

- Your \$67 ensures a family will be able to receive one hour of counselling that helps prevent emergency medical intervention, involvement in the psychiatric and criminal justice systems and supports success for children and youth
- Your \$200 provides one woman who has experienced abuse with one-on-one crisis counselling, a safety plan and access to essential community resources
- Your \$500 provides 95 people with information, resources and education about mental health, mental illness and how to access the help they or their loved ones might need

### **Beginnings & transitions**

Helping children reach their full potential and enabling immigrants to engage, contribute and thrive

#### **Why focus on beginnings & transitions?**

- One in four of children entering the school system is not ready to learn
- One quarter of children in low income, two-parent families have some kind of psychiatric, educational or social problems. This rises to 43% for children of low income, single-parent families
- One in five Londoners is an immigrant
- London has the highest per capita population of refugees in Canada

#### **Impact of your gift**

- Your \$180 provides one year of tutoring for a child, providing them an essential base of literacy skills for lifelong learning
- Your \$300 provides a child from a low-income family a one-week, residential camp experience where they have the opportunity to develop positive social, emotional and physical growth

- Your \$30 provides one hour of translation services for an immigrant family to assist with communicating with legal or health care professionals, teachers and potential employers
- Your \$150 provides one year of weekly practice learning English while receiving community support and making new friends

## Investing in real change



When you invest in United Way, you help create lasting change and provide proven results for our community:

Across Languages\*

Big Brothers Big Sisters of London & Area\*

Boys' & Girls' Club of London

Canadian Hearing Society\*

Canadian Mental Health Association\*

CNIB\*

Changing Ways\*

Children's Aid Society\*

Community Living London

Crouch Neighbourhood Resource Centre

Daya Counselling Centre\*

Epilepsy Support Centre\*

Family Service Thames Valley\*

Glen Cairn Community Resource Centre

Horton Street Seniors' Centre

Hospice of London\*

John Howard Society of London & District\*

Learning Disabilities Association of Ontario

- London Region\*

London & District Distress Centre\*  
London Coffee House Program- CMHA  
London Employment Help Centre\*  
London InterCommunity Health Centre  
LUSO Community Services  
Meals on Wheels London  
N'Amerind Friendship Centre  
Ontario March of Dimes\*  
SARI Therapeutic Riding\*  
Scouts Canada\*

Sexual Assault Centre London\*  
South London Neighbourhood Resource  
Centre  
Stevenson Children's Camp\*  
Unity Project  
Vanier Children's Services  
WIL Employment Connections  
Women's Rural Resource Centre\*  
YMCA of Western Ontario  
Youth Opportunities Unlimited\*

\*provides United Way funded services in Middlesex County

**For more information about United Way visit [uwlondon.on.ca](http://uwlondon.on.ca)**