



United Way
Halton & Hamilton

Campaign Playbook



United Way
Halton & Hamilton

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Introduction

Thank you for raising your hand to be a champion for your organization's United Way campaign. This will be a critical year in our community. We need your help so local programs and agencies can continue to provide essential services to their clients. What we've learned over the past few years is that nothing matters more than standing together, stronger. Thank you for choosing to stand with your neighbours as we make our way through the current economic crisis towards something better. It won't be easy, and it won't be overnight, but the only way we'll ever reach our collective goal of a thriving and more equitable community, is by working together, united.

This guide is meant to provide you with some ideas and suggestions to get you started planning a campaign that will be exciting and engaging for colleagues that are working virtually.

You will see tips on how to:

1. Raise awareness of the needs in the community and how your colleagues can help
2. Maximize participation in the campaign
3. Plan and run exciting special events
4. Consider some non-traditional ways to raise funds
5. Leverage partnerships between Organized Labour and Management

These suggestions are meant to help get you started—don't hesitate to add your creativity to your campaign plan! Your United Way staff partner is here to support you and help you plan a campaign that fits the needs of your organization and your colleagues.

Thank you again for your efforts and passion to plan an exciting campaign to help United Way's funded programs do the same. Together, we address the challenges of today and build a better, stronger tomorrow—for everyone who lives here.

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Building Awareness

One of the important steps of your campaign planning will be to determine how to generate excitement about the campaign, while also inspiring your colleagues of the campaign's impact in the community. Everyone digests information differently and this year, employees may be more broadly located, so plan to use multiple channels to ensure you capture the entire audience.

There are a number of ways we can do this: through Impact Communications, at the Kick-off, through your Union and Management champions, and virtual engagement.

Digital Communications

United Way has several digital content templates that can be used through a variety of your workplace internal communication channels, such as:

- Digital screen content (TV's, computer home screens)
- Stories for internal newsletters, intranet, letters attached to paystubs, etc.
- Sample kick-off and reminder emails
- Employee brochures, impact reports, 1-pagers on particular issues, etc.
- Suggested social media content
- Impact Calculator (Dollar figures that represent impact in our community)

Campaign Kick-off Presentations

A virtual, in-person or hybrid kick-off has many benefits:

- **Ready, Set, Go!** A kick-off presentation clearly marks the start of your United Way effort to create a sense of urgency and a timeline for colleagues. Campaigns with kick-off events have proven to raise more dollars in support of our community
- **Inspiration.** The kick-off provides employees with an opportunity to hear about the impact of their donations and be inspired, so they can make an informed decision about giving
- **Team Building.** This is a great chance to bring employees together in a common cause of caring and build morale
- **Stage Setting.** It demonstrates the passion your organization, your senior management and your colleagues have for the campaign and supporting our community.

Your United Way staff partner is here to support you and can help you plan and customize your kick-off event. We have created tools and resources to support you in hosting your campaign kick-off .

Key Considerations and Planning

1. Kick-Off Format

Will you be hosting your kick-off in-person, virtually, or a hybrid of both? Your United Way staff partner can help you build your kick-off agenda and activities based on the format that works best for your team.

2. UWHH Kick-off PowerPoint Template

Your United Way staff partner can work with you to customize the UWHH kick-off PowerPoint template to fit your organization.

3. Send out a kick off SAVE-THE-DATE

Give your team lots of notice to reserve the kick-off time in their calendars. This will also be helpful in choosing a time your senior leadership are also free to join the kick-off.

- If you are piggy-backing your kick-off onto another meeting (town hall, health & safety meeting, shift huddle, etc.), ask the meeting leader to include the kick-off on the agenda far in advance as these meetings are typically jam-packed with information and short on time.

4. Senior Management/Union President Support

Support from your executives and/or Union President is critical to showing your organization is behind the campaign. Book their time so they can participate in your campaign kick-off, or see if there may be existing meetings you can piggyback on.

- Ask your senior leader/Union President to endorse the campaign live at the kick-off or they can film a campaign endorsement video. If your workplace is unionized, a consistent message from the CEO and Union President supports a strong joint union-management campaign.

5. Consider your Audience

For best results, we recommend a kick-off event is scheduled for no longer than 30 minutes. If your employee base is large, you may consider hosting a series of kick-offs (e.g. by department) through the day, or across a few days. While there is no ideal, you want to strike a balance between being able to reach all your employees, and helping people be comfortable enough to ask questions and interact.

6. Determine the Agenda and Speakers

It is best if the Employee Campaign Chair acts as facilitator to ensure your kick-off sticks to the agenda. Your United Way staff partner would love the opportunity to join the presentation and can present as well. Invite your CEO or other executive(s) to take part and speak too, as their leadership can inspire others and demonstrate support of United Way from the top down.

7. Make it Interactive

Engage your colleagues during the kick-off. Consider interactive activities like quizzes, etc. to hold their attention. Your United Way staff partner can help you build this activity.

Key Considerations and Planning Continued

8. Share stories about the Impact

United Way can help to recommend a [short video](#), a speaker bureau volunteer, or interactive activity to share the impact of donations and inspire people to give.

9. Set Clear Action Steps

Let people know how they can donate and/or how they can get involved in the campaign. Sending your donation link immediately following your kick-off event, can ensure people take action while they're feeling inspired.

10.Share the Event Schedule

If you are planning on hosting events throughout the campaign, share your event schedule with everyone. You can also put event invitations right into colleague's digital calendars.

11.Record your Kick-off

It is important to encourage all employees to join the campaign kick-off, however, ensure that you record the kick-off presentation so it can be sent to individuals who could not attend or post it on your organization's intranet.

Example Kick-off Schedule	
Opening - 5 minutes Time: CEO/Campaign Chair/Union President/United Way Staff Partner	<ul style="list-style-type: none">• Welcome• Value of UW and company partnership• Importance of supporting United Way now• Encourage everyone to get involved with campaign activities (even if in a virtual environment)• Interactive poll or quiz to get people involved
United Way Awareness Activities - 7-12 minutes Facilitated by United Way	<ul style="list-style-type: none">• UW and company quiz• Group sharing "why I care about the community", "which #UNIGNORABLE issue resonated with me"• UW videos• Guest speaker from United Way
Closing Remarks - 5 minutes CEO/Campaign Chair/Sr. Leaders/ Union President	<ul style="list-style-type: none">• CEO or Campaign Chair to thank participants and reiterate the importance of supporting UW• Call to action/donate now• Share company fundraising/participation goals and any matching opportunities• How to donate• Instructions on next steps (link to donate, who to contact if you have questions, etc.

Engaging your colleagues through stories and experiences

Engagement activities are community-focused opportunities to gain a deeper understanding of how donations to United Way are being invested to achieve positive impact in communities across Halton & Hamilton. These activities are also an excellent opportunity to boost morale through team-building activities.

Here are a few examples of engagement opportunities:

- Making choices activity - an interactive simulation to build empathy for families living on the edge of crisis.
- Facilitated discussion with an impact speaker - hear stories of how your United Way is touching lives.
- United Way Kahoots are fun interactive trivia games that can be facilitated virtually or in-person.
- Virtual & In-Person Days of Caring - offers employee groups an opportunity to get involved with United Way's work. Activities could include: writing letters to isolated seniors, or creating hygiene kits for someone experiencing homelessness, or craft kits for kids at an after-school program, visiting our Community Donation Warehouse.

Building & Training Your Team

Every strong campaign starts with a strong team. Consider what roles may need to be added to your campaign committee; your campaign team will still need committee members, but since campaigns will be relying heavily on technology, you might also need:

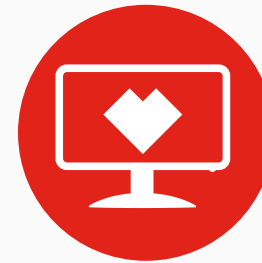
- IT support to run online meetings and online donation support
- Communications support for social media, e-mail communications, staff intranet updates
- Virtual kick-off or event leads

United Way has many online resources that can be used to train your team including online planning guides and templates and your United Way staff partner can also help facilitate an training session.



Employee Giving

Now more than ever, your employee giving program will be the central focus of your campaign. United Way can provide giving options that work best for your work environment. Consider the following options: E-Pledge, Fillable PDF Pledge Form, Paper Pledge Form, Perpetual/Continuous Giving, Gifts of Securities



E-Pledge

E-Pledge provides a personalized (and secure) online experience for each employee to make their donation online in less than 2 minutes. Results are tracked in real-time on a digital thermometer. There's no cost for setup. Reach out to your United Way staff partner to learn how to get started.



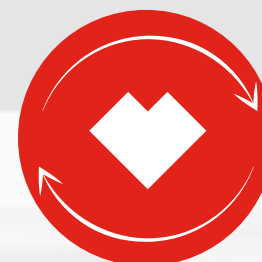
Fillable PDF Pledge Form

Our traditional paper pledge form is available in a [digital fillable format](#). The document can be completed on your computer, saved as a PDF and sent to the campaign chair.



Paper Pledge Form

Paper pledge forms will be available for workplaces who are unable to reach their employees virtually. To simplify return of forms, you may wish to send the pledge forms to each employee with a pre-addressed envelope for interoffice mailing back to the campaign chair.



Perpetual/Continuous Giving

- Consider moving to an automatic renewal of payroll donations upon sign up (deductions roll-over year after year). Donors can always ask to have their donation increased, decreased, or cancelled at any time.
- Already using an automatic renewal? Add special incentives to encourage donors to consider increasing their gift this year.



Gifts of Securities

Gifts of Securities are a tax-effective way to donate, because it removes the taxation of capital gains.

Consider sharing the [Securities Form](#) with your colleagues to promote this tax-smart giving option.

Ambassadors & Canvassing

Ambassadors are key to the success of every campaign. These volunteers approach their peers in the workplace to raise awareness about United Way’s vital role in the community and invite them to make an informed choice about investing in their community.

Ambassadors share 3 key messages with their colleagues:

- 1. **Inform** of the benefits United Way brings to our community and promote the campaign and activities going on at the workplace.
- 2. **Ask** peers to consider investing in the community through United Way.
- 3. **Thank** colleagues for their time and participation.

The most effective method of canvassing is done in person; either one-on-one or with a group. Encourage ambassadors to reach out to their peers over the phone or video chat platform so they can engage in a dialogue about the campaign.

It’s important to ensure campaigns are inclusive and every employee has an opportunity to participate. Campaign Ambassadors ensure that whether employees are working virtually or in person, each employee is personally invited to help your workplace reach its goal to help our community.

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. United Way Leaders are passionate about leaving their mark on Halton and Hamilton by creating lasting change.

Grow Your Leadership Giving Program

- Host a Leadership event and invite a United Way Leadership speaker. Have Ambassadors who are Leadership donors themselves 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.

Employee Pledge Participation Incentives

Offering incentives can dramatically increase participation. Incentives can also be used to motivate early bird donations, new and increased giving, Leadership giving, continuous payroll, etc.

Some examples of incentive prizes include:

- Vacation time
- Free admission or pass to company event/recreation facilities/cafeteria credit
- Electronics
- Lunch with CEO/Executives
- Golf with CEO/Executives at company tournament or UW tournament
- Gift cards
- Local brewery/winery packages
- Parking spots
- Early release on holiday weekends
- Pledge \$X or more and participate in all special events at no cost
- For each donation of \$X and we’ll send _____ to 10 families
- If the organization raises \$X or reaches X% participation in the employee giving program, CEO/executives will grow a beard, shave head, pie in the face, etc.
- If organization reached X% participation in employee giving, all employees will receive X or are put into a draw to win X
- Tiered raffle system based on date, giving level. Eg. If you give at a Leadership level, you’ll receive 5 ticket entries. If you give by Oct 5th, you’ll receive 3 tickets in the draw. If you meet all the criteria, you receive all 3 incentives.



Retiree Engagement

Today's retirees remain vibrant and may still feel a strong allegiance to their former workplace and to United Way.

Retiree campaigns help retirees feel like they continue to be a part of the organization. The most successful retiree campaigns simply involve letters sent and followed up on by someone from the campaign committee (even more powerful if followed by another retiree from the organization). Many retirees do not currently contribute simply because they haven't been asked.

Know of a group of employees that will be retiring soon? Ask your HR department if retirees can have the option of deducting their United Way donation from their pension remittance. Or, ask if a monthly giving pledge form can be included in their off-boarding package - an easy way to transition their gift from payroll deduction. United Way has sample letter templates that can be included in retiree information packages.

Special Events

"Where do I start?"

Creating excitement and bringing employees together is still an important part of a campaign. Even when employees are working virtually, this is a great time for fun interactions between colleagues. Now is the time to flex your creativity muscle! Here are a few virtual event ideas to get you started:

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- people are more likely to sponsor you to run a 5km vs. walk around the block. Talk to United Way about an online tool that can be used to collect donations from colleagues, family and friends.

You can choose to fundraise for challenges in different ways:

- 1 week food bank challenge
 - 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
- "A-thon" type of event
 - Play video games, board game, lawn games, etc. for 12 hours straight

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 the event at a distance
- 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

Contests

- Online Auction
- 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 UWHH and include #LocalLove and @UnitedWayHH

Non-Traditional Fundraising

Now is also an exciting time to think outside the campaign box! Are there opportunities for funds outside of the employee campaign at your workplace?

- Sponsorship - ask your UW Staff Partner for a Sponsorship Package to see which opportunities resonate with your company
- Are there cost savings from your workplace available that otherwise would have spent on such things as in person events, meetings and catering?
- Does your company provide a match for employee volunteering? If not, could this be an opportunity?
- Consider a digital point of sale campaign/portion of your company's sales to encourage online sales/interactions and show your customers that you're a caring company!
- Bottle Drive / Scrap Metal Collection / Hazardous Waste Collection: Donate the refund you receive from recycling to your United Way campaign!
- Use gifted items from vendors, suppliers, law firms etc for incentive prizes, online auctions to bolster funds. Or, request event sponsorship, financial donation, or in-kind donations from them toward your campaign.
- Request a donation to UW in place of payment for use of your property/services. (Ex. film company uses property and makes a donation to UW in exchange for use of land)
- Does your workplace have internal employee surveys? Encourage employees to complete the survey by incentivizing a gift given at \$X amount for participation.
- Is your workplace encouraging clients to do online business/online statements/mobile banking or billing? Offer to provide a corporate gift to UW for each online/mobile conversion.



Labour Engagement

United Way and Organized Labour have had a long history of working together to build strong and healthy communities. Union members and their families represent a broad spectrum of community members as donors, volunteers and users of the services and programs supported by United Way. Joint Union-Management campaigns are an inclusive way to engage all employees working in unionized workplaces.

Here are a few ideas to enhance collaboration with labour in your campaign:

- Secure endorsement from union leadership - Support from the Executive Leadership within the Local is just as important as endorsement from the Company's Senior Managers. This could include a letter, or verbal endorsement of the campaign within the workplace or at members meetings.
- Ask a member of your Local Union Executive to join the campaign committee, if they are unavailable have the Executive appoint a union representative. Let your employees know they are included.
- Ask both Union & Company to donate incentives- parking spots, lunch with the Union President(s) or CEO, and swag.
- Encourage partner unions to host a campaign event through the local (e.g. BBQ, breakfast, auction, etc.) for members within the workplace to visibly demonstrate the support of the campaign.

Physical boundaries create new challenges when designing your workplace campaign, but also exciting opportunities to engage your colleagues in the community in brand new ways. United Way sincerely thanks YOU for the important role you play in helping our community. Your innovation and commitment is helping to keep Halton & Hamilton strong and connected now, and for years to come.

Saying Thank-you

Remember to thank your donors and volunteers for their generous contributions. There are lots of virtual ideas to let your supporters know how much their investment is appreciated.

- Send a thank-you email, or mail a physical thank you card
- Personalized thank you phone call
- Shoot a quick video of yourself expressing thanks and/or have the CEO do the same
- Porch-drop/Mail package with treats
- Shout-outs on your company intranet or social media
- Share examples of impact of dollars raised. You can refer to the Impact Calculator, [found here](#)
- Share a thank you message via letter, internal newsletter, internal TV screens, etc. [\(Templates available in online toolkit\)](#)

