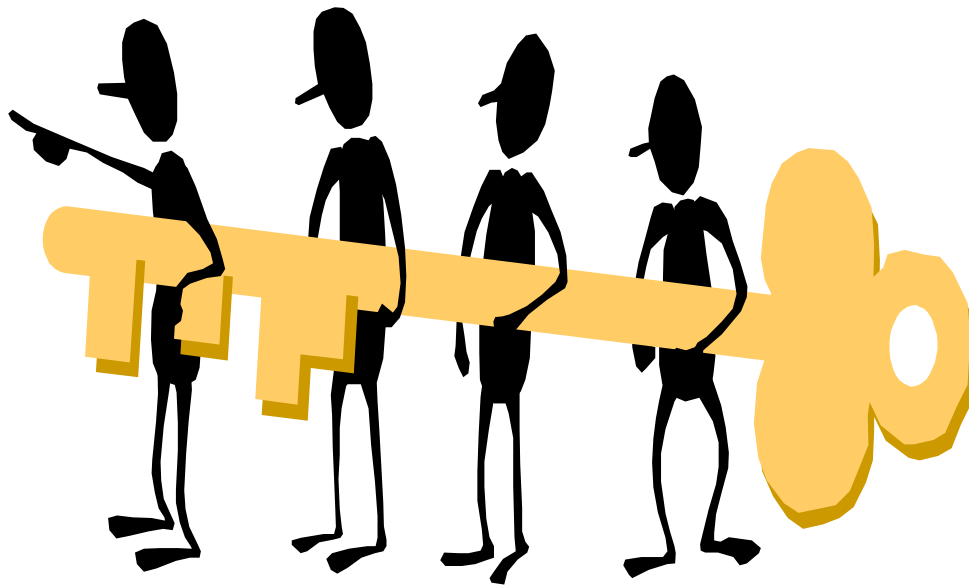


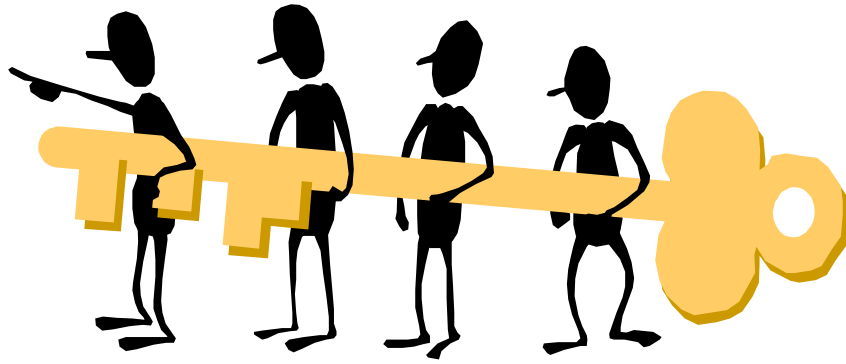
KEYS TO A SUCCESSFUL EMPLOYEE CAMPAIGN



**EMPLOYEE CAMPAIGN
RESOURCE GUIDE**

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KEYS TO A SUCCESSFUL EMPLOYEE CAMPAIGN

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LEARN ABOUT UNITED WAY

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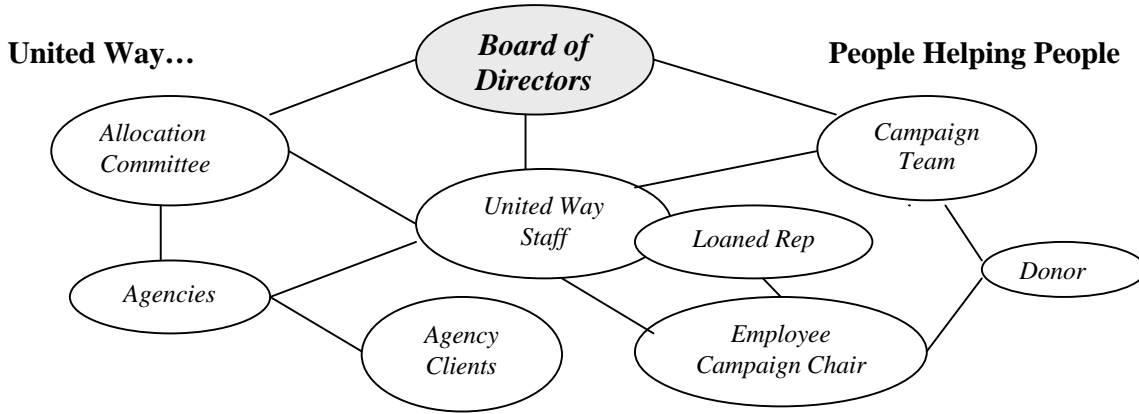
EVALUATION

1



LEARN ABOUT UNITED WAY

United Way is a nonprofit organization created more than 40 years ago to bring together financial and human resources in a common cause of caring. Our focus is to meet urgent human needs by supporting health and social service programs essential to this community.



Loaned Representative are individuals "on loan" from businesses in the community during the fall campaign period. They are a vital extension of the United Way staff



Key Facts:

- ❑ All funds raised stay in Thunder Bay to support vital services for many in our community.
- ❑ The United Way fundraising effort is driven by close to 1000 committed volunteers.
- ❑ 84 cents of every dollar you donate goes directly to help people in need.
- ❑ Needs assessment studies determine where there is the most need in our community.
- ❑ Your donation is invested wisely. Experienced volunteers decide where the funds will have the greatest impact.
- ❑ Funded Agencies offer a wide range of services addressing health and social problems. Through Donor Option, many organizations receive funding through United Way.
- ❑ One in three families are assisted each year by a United Way funded agency. United Way helps your family, your neighbours, and your co-workers. Chances are, United Way has helped someone you know.

DONOR OPTION allows for donors to contribute to ANY REGISTERED CHARITY. By consolidating your giving through United Way, you only have to keep and record one receipt for all of your charitable gifts. This special service makes giving easier, saves time, and there is no administrative fee.

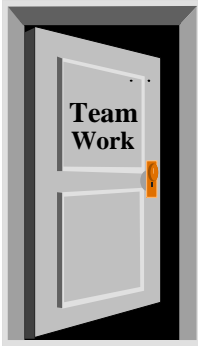
Note: Donations to United Way fully qualify for charitable tax credits provided by the federal and provincial governments.

2

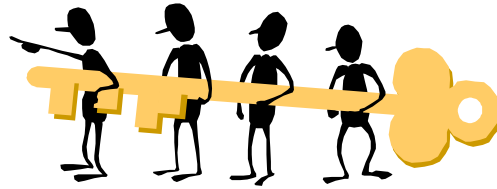


BUILD YOUR TEAM

Secure support from Senior Management and Labour Leadership and ask that they:



- Authorize ECC / canvassers time to do
- canvass and attend meetings.
- Establish a budget for kick off and other events.
- Send Letter of endorsement to all staff
- Attend kickoff & other events



Recruit a Committee / Canvassers

- Numbers depend on the size and structure of your organization.
- Representation from each department or location of the workplace.
- Representation from Labour if workplace is unionized.
- Choose the right people – energetic, enthusiastic, committed, respected.

*Make sure that you have.... **THE VOLUNTEER VS THE VOLUNTEERED***

PROFILE OF A CANVASSER

Canvassers are the people who approach co-workers, one-on-one, seeking donations to United Way. Whether you call them canvassers, reps, team members or campaigners, they are the ones who make United Way campaigns continue to succeed year after year. They are the front-line of your campaign, the people who beat the United Way Drum and encourage participation in the campaign.

A “canvasser” can be many things....

- A “Cheerleader” who generates some fun and excitement around the campaign and communicates good news as it develops.
- A “Trendsetter” who leads by example.
- An “Expert” source of information on United Way and its funded agencies.
- An “Enthusiastic Representative” of your campaign committee.
- A person who says “Thank You” to donors for their generous support.

3



ANALYZE PREVIOUS CAMPAIGNS

Analyze past campaign results in order to build on strengths and identify areas of opportunity. Last year's Employee Campaign Chair and/or United Way staff or Loaned Rep can help with statistical data.



	2000	1999
Total \$\$ raised?	_____	_____
What was your goal?	_____	_____
Number of Employees	_____	_____
Number of donors	_____	_____
Overall participation rate?	_____	_____
Average Per Donor Gift?	_____	_____
Was there a kick-off event?	_____	_____
Was there a wrap-up event or announcement?	_____	_____
Were pledge cards personalized?	_____	_____
Were there fewer donors? If so, why? (down-sizing, ineffective canvass?)	_____	_____
Number of new donors?	_____	_____
How were they attained? (new employees, effective canvassing?)	_____	_____
Was management/Labour involved?	_____	_____
Was payroll encouraged for ease of giving?	_____	_____
One on one canvass done?	_____	_____
Special Event \$\$\$	_____	_____
Award received	_____	_____

4



DEVELOP A PLAN

- **ESTABLISH TIMEFRAME FOR THE CAMPAIGN** - Two weeks is great!
- **SET GOALS:** It is important for the ECC (& committee) to set goals in order to establish a clear direction and concrete objectives for the campaign.

Participation Goals

- Are you working with the same number of employees as the previous year?
- Can you increase the percentage of employees giving?
- Can the possibility of an award or incentive prize be used as a motivator?

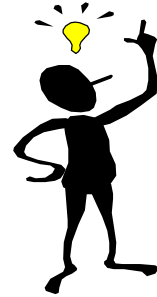
Financial Goals

- Can you increase the average donor gift?

Suggested Gift = 1 hr. wages per month Or a Coffee Break a week!

□ DEVELOP KEY STRATEGIES

- Enlist the support of an appropriate number of canvassers. (15 or 20 contacts per canvasser)
- Canvassers should be familiar with the United Way.
- One on One approach / Peer to Peer approach.
- Offer a presentation in your workplace by a United Way speaker.
- Offer incentive draws and prizes for donors.
- Encourage payroll deduction – it's easy and painless!
- Personalize your pledge forms.



□ SPECIAL EVENTS

Special Events cangenerate fun and enthusiasm
create awareness
raise extra dollars

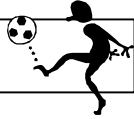
- Plan a kick-off event.
 - Set a theme
 - Other special events are best done after peak canvassing time.
-
- **COMMUNICATIONS PLAN** - Keep everyone posted!
 - Use email messages.
 - Posters in the lunchroom or by water machine.
 - Use office newsletter / employee brochures.
 - Have letter of endorsement from CEO & union leader.

5



PUT PLAN INTO ACTION

KICK OFF



It is important that every United Way campaign have a definite beginning and end. A “Kick-Off” is a means of marking the start of your organization’s campaign. It can be an event, a publicity blitz, or simply something fun and out of the ordinary that signals the start of the campaign. Be sure that your Kick-Off appeals to a broad range of your employees.

Some ideas that have proven successful:

- ❑ A balloon, along with pledge card, brochure and key United Way facts at each employee’s workstation.
- ❑ Senior management at each entrance to greet people and hand out free coffee / balloons as people come to work.
- ❑ Pancake breakfast or barbeque lunch – senior management doing the cooking!
- ❑ Group meeting with United Way agency speaker and or video.
- ❑ Publicity blitz in your workplace – posters, thermometers and other promotional material.
- ❑ Endorsement memo to all employees from CEO, outlining highlights of campaign and asking for full support.

CANVASS



There are different ways to canvass. The most effective approach is face to face because “People give to People”. Personal canvassing can be done one-on-one or in a group setting.

- ❑ One-on-One: This highly effective method involves recruiting and training canvassers who approach co-workers individually and ask them to contribute to United Way.
- ❑ Group Canvassing: This is a very effective method because the message is consistent, it requires fewer canvassers than one-on-one canvassing, and can be done in 15-30 minute sessions. This type of canvassing works particularly well in workplaces with numerous employees.
- ❑ Combination Approach: The combination approach includes a group presentation followed up by a One-on-One approach by canvassers soon after the group presentation.

MONITOR

- ❑ Take stock in overall campaign progress
- ❑ Update campaign thermometer.
- ❑ Communicate progress to fellow employees to generate enthusiasm.
- ❑ Ensure all pledge cards are returned / Re-canvass if necessary.



TIP: Aim for 100% return of pledge cards. This will make it easier for you to determine who still requires follow up and may inspire some employees to make a small donation rather than return a blank card. **REMEMBER! Every dollar counts!**

6



WRAP UP & REPORT RESULTS

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

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



Some ideas for Wrap-up:

- Wrap up meeting with presentation of cheque to United Way representative.
- Wrap up reception in lunchroom or boardroom as a celebration.
- Thank you ceremony in staff room – Management participation. Special campaign newsletter to announce results and recognize donors, volunteers, etc. Include photos taken during campaign.

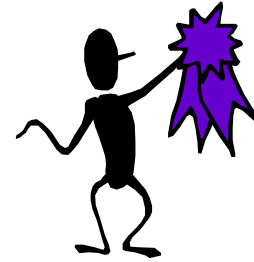
The welfare of each is bound up in the welfare of all.
Helen Keller

7



RECOGNITION & THANKS

THANK YOU! We all like to hear these two simple words of appreciation. Recognizing volunteers and donors is an important part of your campaign.



Some suggestions for recognizing employee participation:

- ❑ Thank You Letters (or certificates) from the ECC / CEO & Labour Chair (if applicable)
- ❑ “Payroll Stuffer” : Use inter-office or internal mail system
- ❑ Distribute a token thank you “gift” (donated goods, promo items, mint)
- ❑ Employee and/or Union Newsletter: Feature a “Thank You” & announce results.
- ❑ Thank You Posters: displayed on employee bulletin boards, in lunchroom etc.
- ❑ Thank You Event: Cheque presentation to United Way or United Way rep there to say thank you. Offer complimentary coffee and donuts.

8



EVALUATION

It is important to pause and reflect at the end of your campaign. Invite your team to assist you in this process and schedule the meeting while the campaign is fresh in your mind.

Your evaluation should include:

- A review of campaign achievements (dollars, number of donors, average gift)
- Comparison of achievement to original goals.
- Identification of strengths and weaknesses.
- Recommendations for next year.



A written report identifying campaign activities, results and recommendations will definitely be appreciated by next year’s ECC.

SPECIAL EVENTS

SPECIAL EVENTS act as an excellent compliment to your United Way Campaign. They create excitement and awareness, and can set the stage for your employee canvass. Be sure that any major fundraising activities are positioned after the employee canvass so that individuals do not feel that the money they are spending on various events replaces their payroll, cheque or cash donations.



SOME EVENT IDEAS

FOOD, FOOD, FOOD Barbeque, potluck, pancake breakfast, pizza lunch.

EARLY BIRD DRAW Solicit prizes and place names of employees who return their contribution forms early into a raffle draw.

“MYSTERY CLUE” CONTEST Have a clue a day for your campaign, trivial pursuit/crossword style/United Way information/All about Thunder Bay – replies by E-Mail – award points for each right answer – easy to involve everyone.

SILENT AUCTION Get everybody involved by having them contribute anything they can-baked goods, crafts, services such as a golf/ tennis /music lessons or dinner “Chez Boss”.

TEAM CHALLENGES Pull together a team and challenge other departments/workplaces to baseball, tug-of war, trivial pursuit, basketball, obstacle courses.

E-MAIL BINGO Sell bingo cards and call out numbers over your E-Mail. First person to get Bingo sends an E-Mail message, “Bingo”.

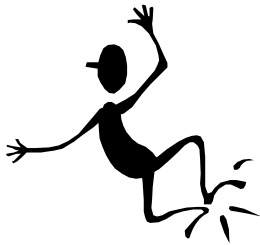
POP LUCK Everyone’s a winner! Pop a balloon and win a prize – have employees/suppliers/clients donate what they can. Display the prizes in a central location. Charge employees to pop balloons with prize tickets in them.

GO FOR GOLD Mini Olympics, inter-departmental pentathlon – schedule an event every lunch hour, ie. Airplane throwing contest, waste-paper basketball, phone book tossing, office furniture obstacle course...put together a team and challenge other departments.

MINI-GOLF TOURNAMENT Set up a mini-golf course throughout your offices. Be creative. Each department can create its own “hole” using common items around the office. Charge “green fees”.

MAKE SPECIAL EVENTS “SPECIAL”

Promote your event using flyers, newsletters, e-mail, voice-mail etc. Make sure that everyone in your organization knows all the details of the event. Try to involve senior management (and Union Executives). Everyone loves to see the CEO or Union President flipping pancakes, barbecuing hot-dogs, batting baseballs or shining shoes! It’s also fun to get together on an informal basis.



PAYROLL DEDUCTION IS EASY!

It's The Way you can help the most!

AS EASY AS 1, 2, 3....

Payroll deduction is the “easy” payment plan” – the automatic instalment paying of one’s United Way pledge over a twelve-month period. Some firms may feel that payroll deduction for United Way contributions will present problems for the Payroll Department. This just isn’t so. Deductions for the United Way are handled in the same way as the standard Income Tax, E.I. and CPP deductions.

1. Collect the pledge cards from your employees indicating how much they wish to contribute on a “per pay” basis.
2. Begin deductions on the first pay of the calendar year.
3. Remit deductions to the United Way office, monthly or quarterly.
4. Include “charitable donations” on employee T-4 slips. No other receipt is required. Be sure to quote our Registered Charitable Registration number 12982 0387 RR0001.

ADVANTAGES

1. Employees can spread their charitable donation payments over a year, which gives a cash flow advantage.
2. T-4 receipting is expedient and ensures employees will not lose a receipt or forget a charitable deduction.
3. Payroll deduction encourages generous charitable giving, creating a greater corporate profile and a stronger community.
4. It demonstrates employer commitment to the community.

PLEASE NOTE:

- If you are unable to include charitable donations on your T-4 slip, or if your payroll department has any questions, please do not hesitate to call the United Way office.
- Minimal effort on your part can result in maximum benefit for your employees and your community.

EMPLOYEE GROUP AWARDS

In appreciation of the generous assistance shown by employee groups in Thunder Bay, the United Way recognizes this support with the following awards.



MERIT AWARD

20% or more increase over
last year's contribution



PLATINUM AWARD

90% of the employees contributing &
\$104.00 per donor (\$2.00 per week)



GOLD AWARD

75% of the employees contributing &
\$65.00 per donor (\$1.25 per week)



SILVER AWARD

60% of the employees contributing &
\$52.00 per donor (\$1.00 per week)



BRONZE AWARD

40% of the employees contributing &
\$26.00 per donor (\$.50 per week)

Please note: To qualify for an award, your organization must have a minimum of 5 employees.

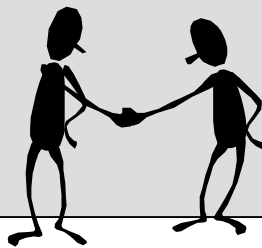
DETERMINING WHERE THE \$\$\$ ARE NEEDED THE MOST

NEEDS ASSESSMENT STUDY

In order to ensure that funding decisions are made based on valid and relevant data, there is ongoing assessment of Human Service Needs. This provides the necessary information to ensure that the dollars are being allocated where they are most needed.

THE UNITED WAY & FUNDED AGENCIES

The United Way accepts applications for the funding of programs and services. It is the responsibility of the agency applying, to illustrate the need for proposed programs and services as well as demonstrate the effectiveness of existing ones. They must provide the **Allocations Committee** and its citizen review panels with information relevant to the allocations criteria.



It is the responsibility of the Allocations Committee, through the citizen review process, to evaluate each request in relation to these criteria based on the information provided by the agency.

THE DONOR CAN CHOOSE....

DONOR OPTION

The United Way works for the donor and for the community as a whole. In order to make it more convenient for the donor and to fulfil its role as a “community builder”, the United Way offers “**DONOR OPTION**”.

In addition to contributing to the United Way and allowing the allocations committee to distribute the funds where needed, the donor may direct contributions to any other registered charities. (minimum designation \$20)

With one contribution, a person can do all of his/her charitable giving and then deal with only one receipt.

Through Donor Option, over 100 organizations are funded by the United Way.

Some services provided in the last year....

For individuals and families in crisis:

- People received counselling on how to manage their debts
Family Services Thunder Bay
- Women involved in abusive relationships assisted with shelter, counselling and crisis support.
Catholic Family Development Centre, Family Services Thunder Bay
- Men received counselling on how to stop being an abusive partner.
Catholic Family Development Centre, Family Services Thunder Bay
- People were educated with stress and depression management skills.
Family Services Thunder Bay
- Support and counselling offered for victims of crime, offenders and their families
John Howard Society

Services provided for the sight and hearing impaired:

- Sign language interpreting services enabled the Deaf to access essential services within the community (i.e. medical, legal)
Canadian Hearing Society
- Rehabilitation services provided for people with vision loss, to enable independence.
CNIB

For the Community:

- Volunteers with first aid training provided emergency medical treatment in the community.
St. John Ambulance
- Students received first aid and safety, and/or babysitting training.
St. John Ambulance, Red Cross
- Terminally ill persons and their families received volunteer support services.
Via Vitae
- Adults received volunteer tutoring services to improve their literacy/numeracy skills.
Thunder Bay Literacy Group
- People found rewarding volunteer experiences in over 100 agencies.
Volunteer Centre and all agencies

For children:

- Nutritious meals fed to hungry children
Thunder Bay Boys' & Girls Club, Red Cross
- Children kept warmer in winter with hats and mittens knitted by volunteers.
Red Cross
- Youth learned social skills through activities after school and in the evenings.
Thunder Bay Boys & Girls Club, Navy League
- *Children and seniors formed positive relationships in an Intergenerational choir.
Canadian Mental Health Association*
- Companions provided for children from single parent families to help further their personal development
Big Brothers/Big Sisters

For families and individuals:

- Children's mental health services and prevention activities assisted families in dealing with their daily challenges.
Lakehead Regional Family Centre
- Support groups helped parents in conflict with their teenagers
Catholic Family Development Centre
- Marriage preparation programs helped couples build skills to maintain strong relationships
Catholic Family Development Centre

For persons with disabilities:

- Support provided in all aspects of community living, providing dignity and an increase in the quality of life for these individuals.
Lakehead Association for Community Living
- Children received counselling and treatment to help them deal physically and mentally with their challenges.
Lakehead Regional Family Centre
- Consultation, assistive devices, supported employment and job placement provided for persons with physical disabilities.

Ontario March of Dimes

CAMPAIGN PLANNING WORKSHEET

COMPANY: _____

EMPLOYEE CAMPAIGN CO-ORDINATOR: _____

COMMITTEE MEMBERS/ CANVASSERS & DEPARTMENTS REPRESENTED:

I. KEY CAMPAIGN DATES:		
EVENT	DATE(S)	NOTES
▪ Committee Organized		
▪ Canvassers Recruited/Trained		
▪ Kick-Of		
▪ Canvassing		
▪ Mid-Campaign Review		
▪ Special Events _____ _____ _____		
▪ Wrap-Up		
▪ Evaluation		

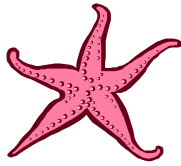
II. KEY STRATEGIES:		
Strategy	Description	Person Responsible
1. Management and/or Union Involvement		
2. Communications		
3. Canvasser Recruitment and Training		
4. Canvassing Techniques (i.e. Group, one-to-one, re-canvassing, home workers, etc.)		
5. Finance/Administration		
6. Monitoring		
7. Recognition		

2001 GOAL

$$\frac{\text{\# EMPLOYEES}}{\text{PARTICIPATION GOAL}} \times \frac{\text{AVERAGE GIFT}}{\text{SPECIAL EVENTS \$\$}} + \frac{\text{SPECIAL EVENTS \$\$}}{\text{2001 GOAL}} = \frac{\text{2001 GOAL}}{\text{2001 GOAL}}$$

* Participation is calculated by dividing the number of donors by the total number of employees.

** Average Gift is calculated by dividing total pledge card dollars by number of donors



STAR FISH



*As the old man walked the beach at dawn,
he noticed a young man ahead of him
picking up starfish and flinging them into the sea.*

*Catching up with the man,
He asked him why he was doing this.*

*The answer was that the stranded starfish
Would die if left to the morning sun.
“But the beach goes on for miles and
there are millions of starfish,”
countered the other. “How can your effort
possibly make any difference?”*

*The young man looked at the starfish
in his hand and then threw it to
safety in the waves. “It makes a
difference to this one,” he said.*

By Loren Eisley