

# United Way Central & South Okanagan/Similkameen

## Employee Campaign Coordinator (ECC) 2017 Training Guide



**United Way**  
Central & South  
Okanagan Similkameen

#202 – 1456 St. Paul Street, Kelowna, BC V1Y 2E6  
Telephone: 250-860-2356  
[www.unitedwaycso.com](http://www.unitedwaycso.com)

# Employee Campaign Coordinator Training Guide

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**Welcome to the United Way of the Central and South Okanagan/Similkameen!**

**We are so glad you joined us!**

**Thank you for accepting the role to help run a United Way campaign at your workplace!**

Working to engage your co-workers in a United Way campaign is an important part of building a caring and vibrant community for everyone.

**This guide has been prepared to help you lead a successful workplace campaign.** Included is information about United Way, campaign tools, and other helpful resources. You will also find a 10-step campaign planning guide that other campaign coordinators have found to be helpful. While this guide is intended to be a resource for you, please remember that our staff is always here to help you. Feel free to contact us with any question or request - we will do our best!

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## United Way Messaging

United Way of the Central & South Okanagan/ Similkameen is dedicated to improving the quality of life by advancing the common good...when we reach out a hand to one; we influence the condition of all. We all benefit when a child succeeds, when families are financially stable, seniors are involved in community activities and when people are healthy and safe. It is our mission and promise is to **improve lives and build community by engaging individuals and mobilizing collective action.**

Research and community consultation tells us that by focusing on the following key social issues, we can help prevent problems from happening in the first place. Our specific areas of investment for impact include our three focus areas:

- ❖ **From Poverty to Possibility – meet basic human needs and move people out of poverty.**
- ❖ **All that Kids Can Be – help children and youth reach their full potential.**
- ❖ **Healthy People, Strong Communities – support personal well-being and strengthen neighbourhoods.**

We know our future success will depend on the relationships we build with people and their communities. Our ability to engage and inspire others will encourage new opportunities and challenges for us to work together in new and different ways.

## Our Community Impact

Community impact is about achieving meaningful, long-term improvements to the quality of life in our communities, by addressing not just the symptoms of problems but also getting at the root causes. It's about making fundamental changes to community conditions.

United Way CSO achieves community impact by focusing on 4 key strategies:

Engaging community resources (dollars, influence, time and knowledge).

- Influencing public attitudes, systems and policies.
- Focusing on underlying causes of social problems.
- Strengthening the network of services and the capacity of non-profits and community.

## Strategic Priorities for Improving Lives and Building a Better Community

United Way of Central & South Okanagan/Similkameen has further defined 9 local priorities based on research and community consultation.



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Over the last several years, we have worked in collaboration with groups from various sectors on new and innovative projects. Some examples of these include:

- **Days of Caring** (a community-wide hands on volunteer opportunity for organizations to be matched to a particular project at a non-profit organization)
- **Success by Six** (an early childhood development initiative dedicated to providing all children with a good start in life that has coordinators throughout our region)
- **GenNext Leadership Cabinet** (opportunities for young leaders to develop leadership and volunteer opportunities in our communities)
- **Youth Grants** (opportunity for youth to submit projects for funding (up to \$1500) to create social change in our community)
- **Emergency Transportation Program** (we distribute bus tickets to community agencies and organizations to assist their clients in accessing emergency social services)
- **Allocations Impact Teams** (volunteer teams who meet our Community Partners to determine how to effectively provide resources to meet the needs of their clients.)

For more information on all of these initiatives, please visit our website for more information at [www.unitedwaycso.com](http://www.unitedwaycso.com)

## Who Does the Campaign Help?

Money raised during the campaign helps to fund programs and services in the community that wouldn't normally be funded otherwise (i.e. are not eligible for government funding). As our campaign grows we are able to help address the changing needs organizations face as new and pressing issues emerge. For a complete list of all the organizations and initiatives that we have helped support, visit: [www.unitedwaycso.com](http://www.unitedwaycso.com)

A few examples of the programs and services that we have helped support in the past year include:

- **Car Seat Initiative** – Providing safe child car seats for families with limited incomes
- **Central Okanagan Family Hub** – Supporting parents in accessing services for themselves & their young children
- **100 Homes Penticton** – Housing supports for vulnerable people in Penticton
- **Emergency Transportation** – Helping people access social service programs with free bus tickets
- **Day of Caring®** - Mobilizing workplace volunteers to renew the properties of charities
- **Youth Initiative Grants** – Youth-led projects that create positive change in our communities

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## Your Role as an ECC

An Employee Campaign Coordinator (ECC) is a volunteer in the workplace who is responsible for managing and monitoring the Workplace Campaign. Your role as an ECC is central to the success of the campaign in your organization and, ultimately, to the well-being of your community. As an ECC, your role is to:

- **Lead and direct the United Way Employee Campaign within your organization, motivate your campaign committee and inspire people to give!**
- Help employees understand what United Way does and how contributions to United Way directly affect their community.
- Give all employees an opportunity to invest in what matters for their community through United Way.

Some responsibilities of ECC might include:

- Recruiting a committee
- Planning the campaign
- Hosting events
- Monitoring campaign progress
- Supplying information, updates and results to United Way office
- Return completed report envelopes to United Way office

This information guide will assist you with your role by providing information on our messaging, campaign best practices and suggested special event ideas.

No individual, organization or agency, working alone, can achieve as much as we can by all working together. Our strength is in our name- **United Way**. The majority of donations raised by United Way come from employees contributing at their workplaces.

Thank you- ***We couldn't do it without you and please remember we are here to assist you in every step of the way!***

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## Campaign Best Practices

The strongest workplace campaigns have a number of things in common – we call them our Campaign Best Practices. Incorporating these elements into your campaign can dramatically increase your success. UWCSO's Campaign Best Practices are as follows:

### 1. Establish a Campaign Committee

Running a workplace campaign is much easier if there are a group of people from all departments and levels of a workplace to become involved in planning and to share the workload. Those who you may consider approaching to become involved in creating a team include: management, a labour (union) representative if applicable, a representative from each department including human resources and payroll, new employees and anyone who is eager to contribute time and energy.

### 2. Obtain Management Support

It is essential to have visible support from your senior management team. Getting involved in a UWCSO campaign is a great way for management to interact with employees and demonstrate their commitment to our community and region.

#### Here are some suggestions:

Identify a 'mentor' from the senior management team. This person serves as your link with senior management and may sit on your Campaign Committee. He/she is helpful in conveying your campaign plans to the senior management team, canvassing, trouble-shooting and securing management support for campaign events.

Include UWCSO on the agenda of all senior management meetings. Request time to share previous campaign results, current campaign plans and other resources

Ask senior management to play an active role in the campaign by supporting volunteers in their individual areas and asking them for regular campaign updates, offering assistance and providing appropriate recognition.

#### A Visible Senior Management Representative can:

- Announce your role as ECC to the workplace
- Attend the first Campaign Committee meeting to give a personal endorsement
- Attend the corporate call with a UWCSO Rep
- Send a letter to all employees asking for their support and inviting them to participate in campaign activities
- Attend group presentations and give a personal endorsement
- Arrange for and attend a wind-up event for the Campaign Committee, eg. Wine and cheese reception.

### 3. Recruit a Union Representative (Where Applicable)

United Way has a strong partnership with Labour. If your workplace is unionized, please ensure unions are represented on your Campaign Committee.

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## **4. Include Leadership Giving as a Goal**

Leadership donors are those who make an annual gift of \$1000 +. Setting goals around the number of leadership donors you would like to have contribute as a part of your workplace campaign and encouraging leadership giving throughout your campaign encourages people to give at this level.

## **5. Set a Participation Goal**

By setting a participation goal, employees can rally together to encourage more people to give. Remember, every gift counts.

## **6. Ensure Every Employee is Personally Asked to Give**

People do not give if they are not asked! Going out of your way to ensure all of your colleagues are asked to donate to your workplace campaign gives people the opportunity to ask questions and make an informed choice about donating. Remember to track those who have been spoken to and what their response was so as not to approach the same person twice.

## **7. Distribute Personal Pledge Forms**

Use personalized pledge forms to ensure everyone has the opportunity to give. Often Human Resources or Payroll Departments can assist with this. Some United Way's have tracked a 30% increase in giving when personal information (name, address, phone number) is already filled in for the donor.

## **8. Inform and Inspire Employees**

When employees hear about the impact that UWCSO makes in your community and region, and see the evidence first-hand, they are eager to invest. Give employees ample opportunity to hear about UWCSO by offering a variety of educational events such as Seeing is Believing Tours where organizations in your community or region delivering services can be visited.

## **9. Offer Incentives for Giving**

Offering Early Bird incentive prizes for pledge forms returned by a specified deadline and other incentives throughout your campaign encourages people to donate.

The following are ideas of incentive prizes:

- Vacation day(s)
- Coveted parking spots
- Lunch/Dinner with the CEO
- Company Merchandise
- Donations from your organizations Vendors
- Restaurant or Mall Gift Certificates
- Tickets to movies, sporting or cultural events.

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## 10. Create a Theme for your Workplace Campaign

Many workplaces create a new theme for each year's UWCSO Campaign to make it more participatory and fun. Themes are a great way to tie your campaign activities together.

Ideas from previous campaigns include:

- Super Hero Theme – Real Heroes Work Here!
- Be a Lifesaver – Give to the United Way (hand out lifesavers with pledge forms)
- The Dream Team – Make Dreams come True
- If I Could Change the World
- A Little Help from my Friends
- Or create your own theme with our new brand "Together We Are Possibility" ....

## 11. Run your Employee Pledge Component Prior to Holding Special Events

Ensuring the pledge component of your workplace campaign is completed prior to holding special events encourages people to participate in both.

## 12. Offer Year Round Communication

Take advantage of non-campaign months to educate employees about UWCSO. Many organizations use intranet, email and community speakers to educate employees and to grow future campaign participation rates. Stay in touch with your UWCSO Rep and visit [www.unitedwaycso.com](http://www.unitedwaycso.com) periodically to garner new information.

## 13. Institute a New Employees Program

When new employees start with your workplace, make sure to give them a pledge form and discuss your organization's commitment to supporting the community through UWCSO. Most new employees are happy to start their giving right away and will continue to give when you run your campaign.

## 14. Establish a Retiree Campaign

Retirees represent a pool of potential donors who may not be captured in your current campaign. With more people retiring every day, a Retiree Campaign is also an excellent way to ensure existing donors stay connected.

Your organization may already be communicating with this group. Your Retiree Campaign may be as simple as including a brochure and pledge form with an existing mail-out, sending a separate mailing to this group, or arranging for a presentation at a retiree gathering. Better still; involve an active retiree in the Campaign Committee.

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## Campaign Tools

To convey a consistent, accurate message we encourage you to utilize United Way's Campaign Tool Kit. Contact your United Way representative to assist you in finding the tools that you need or visit [www.unitedwaycso.com](http://www.unitedwaycso.com)

- **Employee brochure and pledge form**
  - Ensure that every employee receives a United Way employee brochure and pledge form or has the link to your company's online payroll pledging system.
- **Posters**
  - They help create awareness and reinforce United Way's message. Hang them throughout your building.
- **Employee Campaign Coordinator (ECC) training.**
  - Use this guide to help you plan and execute your best campaign ever.
- **Displays**
  - United Way has free-standing banners available for use during your events
- **Video & TV Commercial**
  - Show United Way's video and TV commercial at employee meetings to inform and inspire everyone to support the campaign.
- **Thank You Cards**
  - United Way can provide thank you cards or certificates for you to personally thank every donor.
- **United Way resources available to support you:**
  - Campaign Manager- United Way staff who work with ECC's to facilitate all employee and corporate campaigns.
  - Loaned Representatives (if applicable) - These people assist you during your campaign with questions, planning, finding the right resources.
  - United Way representatives who make workplace presentations to share the impact of United Way's work at their organization and in the community.

## Leadership Giving

Leadership Giving is a United Way program for individual donors who make annual gifts of \$1000 and up.

A Leadership Giving Campaign encourages employees to have a greater impact on communities throughout the Central & South Okanagan/Similkameen and sets your organization apart as a leader. Leaders are passionate and committed to making change in their community and know that their gift combined with others makes a significant impact in our community. Hundreds of donors participate in the leadership campaign each year and not only receive tax deductions but recognition from United Way at our annual appreciation celebration event.

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## \$1000 at Work in our Community: A Leadership Gift is less than \$2.75 per day!

- Provides 30 homeless and at-risk youth with overnight shelter.
- Enables women in abusive situations 26 weeks of counseling to assist with helping them create a better life for both themselves and their children.
- Provides 25 hours of parenting education and support to a group of 10 men.
- Provides a new bed, bedding and other household effects for someone who has been homeless and moves into a residential unit.
- Provides literacy tutoring to vulnerable adults helping them to complete school, gain employment and be an active contributor to their community.

## Campaign Kick-Off

This is your opportunity to inform and inspire your employees with a presentation from United Way. It's also a great chance to announce your goals and get people motivated.

Your kick off should include senior management, ECC, All staff and your committee.

Presentations should include:

- United Way Staff
- United Way video
- Speaker and/or Agency Tour

## The 20- Minute Kick-off Meeting

Group kick-off presentations are the most effective and efficient way to reach all employees and to help them understand the work of United Way and how their contributions impact the community (and build excitement!). It takes as little as 20 minutes to convey key messages to your group, have a Leadership Presenter or Community Speaker and show a United Way video. Be sure to ask employees to give when they receive their pledge forms.

Please call your United Way Campaign Manager to arrange for a Community Partner to speak at your meeting. Remember, people give to people, so don't overlook this critical step. Consider asking a fellow employee to speak about his/her own experiences as a recipient of United Way-funded services.

Sample Agenda	Who	Time allotted
1. Opening remarks <ul style="list-style-type: none"> <li>• Thank participants from coming and launch campaign</li> </ul>		
2. CEO and union endorsement <ul style="list-style-type: none"> <li>• Corporate commitment to UW</li> <li>• Management and Union support for campaign</li> <li>• Request each employee to support the campaign and to consider giving at the Leadership level</li> <li>• Introduction of Community Speaker</li> </ul>		
3. Leadership presenter or Community Speaker		

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4. United Way Overview- United Way staff person/Loaned representative		
5. Campaign Video		
6. Closing comments <ul style="list-style-type: none"> <li>• Thank-you</li> <li>• Reminders of special dates/events</li> </ul>		

## Special Events and Ideas

An ideal campaign has one or two events to create excitement and build momentum. These may include a kick-off, early bird draw and a final draw. They should not take away from the employee pledges and are best scheduled after the pledge forms have been distributed. Participants should not perceive that their financial contribution to special events will replace or lessen their personal pledges; and special events should not take your time and energy away from canvassing.

### Special Events should be:

- Limited in numbers- they can be time consuming for you, and fewer is more exciting.
- Awareness builders- it is an opportunity to help raise awareness about United Way and your campaign.

### Resources

To help with your special events, United Way has supplies such as banners, videos, balloons, stickers. We can also offer a speaker to talk about the positive impact your campaign has on the community. Visit [www.unitedwaycso.com](http://www.unitedwaycso.com) and go to Campaign Tool Kit for a list of popular workplace special events.

### Casual Day with “I’m dressed this way for United Way” stickers

UWCSO can provide stickers for this event. Only employees who purchase stickers or returned their pledge form can participate. You can also make it a costume day. We ask that you not refer to this day as “Jeans Day”, which is a specific fundraising event for BC’s Children’s Hospital.

### Challenge/Competition

A competition based on increases in participation, or dollars or even the first group to turn in all pledge forms can be conducted between departments, floors or locations within your organization. You could also challenge another organization within your industry/sector/office building.

### CEO Challenge

Your CEO/senior manager commits to doing something unconventional (sing karaoke or dress in costume), if a specific participation or dollar goal is achieved.

### Pancake Breakfast or Barbeque

Make this part of your kick-off event. Invite senior executives to help serve and/or cook food for the staff that day.

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## Thank you!

On behalf of your community and those who benefit from the dollars you raise, UWCSO staff and volunteers would like to thank you for your commitment to the role of ECC. You truly make the Central & South Okanagan/Similkameen a better place to live, work and play for everyone. You are truly a Community Hero!

## Your Campaign Plan - In 10 Steps

*The following checklist is meant to help you during each phase of planning and implementation of your employee campaign.*

### 1. Involve your CEO/Senior Management

***The support of your Senior Management in your organization is critical to the success of your campaign. Ask your CEO to assist and support the campaign by:***

- Getting involved
- Attending and/or speaking at campaign events/presentations.
- Approving the employee time necessary to plan and implement your campaign.
- Supporting your campaign goals, strategies and plans.

### 2. Recruit your campaign team

***The goal is to have all members involved and contributing, without feeling overworked or underused.***

- Recruit well-respected and enthusiastic coworkers, who are committed to United Way to sit on your committee
- Look for specific skills/expertise.
- Try to obtain representation from all work groups.
- Recruit Campaign Committee
- Have fun!

### 3. Analyze your previous campaign performance

***Review the results of past campaigns with particular attention to last year's campaign. Your committee can identify strengths and opportunities.***

- Identify trends (participation levels, average gift, timing of campaign, number of canvassers).
- Utilize UW staff support and resources if needed.

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## 4. Set your goal

***A goal motivates and provides a mechanism for measuring the success of your campaign.***

- Your goal should be realistic, achievable and challenging.
- Set a Dollar Goal, Participation Goal and Leadership Goal.

## 5. Develop your strategies

***Your strategies will help you reach your goal.***

- Offer more opportunities to learn about United Way.
- Host a special event to create awareness
- Use personalized pledge forms
- Promote payroll deductions
- Canvass and follow-up with every employee
- Develop a timeline that is appropriate for your workplace. The most successful campaigns are short, fast-paced and organized.

Consult your United Way representative for assistance if needed

## 6. Plan your approach

***The main objective of your campaign is to generate resources by increasing employee awareness of how they can LIVE UNITED by learning community priorities, the services available and how their donation is working in your community. It is critical that every employee is given the opportunity to learn this information in order to make an informed decision. Focus on:***

- Educating employees with presentations, speakers, campaign video and the Seeing is Believing Tour, and a Day of Caring project.
- Preparing pledge packages (pledge form, brochure, letter)
- Canvass employees.

## 7. Promote your campaign

***Spread the word! Create enthusiasm and spirit while helping to maintain focus.***

- Use posters, small incentives, departmental challenges.
- Plan a visible kick-off and wrap-up event.

## 8. Monitor your progress and report your results

***You should track campaign activity and results.***

- Consult with committee members when there seems to be low performance.
- Update management on your campaign's progress and problems.
- Keep enthusiasm high by regularly informing employees of results.

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## 9. Recognize and thank your volunteers and donors.

***The key to success of United Way's work is to thank the volunteers who give their time and talent to the campaign.***

- Thank all donors and volunteers who have made your campaign a success. Recognize them in a staff meeting, in a newsletter, with a thank-you note.
- Invite them to a United Way event such as the UWCSO spring appreciation celebration or the fall kick-off breakfast.

## 10. Evaluate your campaign.

***It is important for the campaign team to analyze and evaluate all aspects of your campaign. The analysis is an important planning tool for future campaigns.***

- Review results and compare them to your objectives.
- Identify the aspects of your campaign that worked well and those that did not.
- Document your findings- the recommendations you make will be valuable in planning next year's campaign.