



United Way
East Ontario



How to run a successful workplace campaign.

Our mission is to bring people and resources together to build strong, healthy, safe communities for all. But we do not do this alone.

United Way East Ontario tackles the tough problems.

Workplace campaign fundraising helps address the needs of vulnerable people and our communities' toughest challenges while bringing employees together to make our region a better place for everyone.

A successful fundraising campaign starts with you! As the Campaign Lead, you are the key to fueling local impact. Your role is to coordinate a dynamic campaign tailored to your unique workplace. Using your passion for the cause, some creativity, the amazing tools we provide, will help ensure you have what you need to reach your goals.

**Whether virtual or in person,
a great campaign has 3 parts:**

Plan → Implement → Wrap Up

Plan

Visit our Campaign Toolkit at UnitedWayEO.ca/CampaignToolkit for useful information on United Way, campaign best practices and to find all the tools & resources needed.

- **Start early.** Getting a head-start on planning can help ensure you have all the tools and resources for success. Planning 6-8 weeks out from campaign launch is recommended!
- **Gather feedback.** Speak with past campaign members, review strategies, tactics, timelines, and results. Ask about what worked and what could be improved.
- **Identify key dates and goals.** Determine when your campaign will launch and how long it will run. Set goals in consultation with your United Way representative or set a stretch goal, building on previous year's results. Offering incentives can be a great way to increase participation in your employee giving campaign.



- **Recruit support that can help.**
You are not alone, gather a team of enthusiastic fundraiser from across your organization. Using the tools we have provide, customize our sample emails for each phase of your campaign, you can pull information from our fact sheets or attach it to your note, or link to one of our moving videos.

- **Engage senior leadership team.**
Approach current leadership donors (donate over \$1200/year) to become ambassadors. Senior leadership can help advocate for your campaign and have one-on-one conversations about why they give.

Meet with your United Way team member to:

- **Receive last year's campaign achievements and results.**
- **Set up a customized website for your organization to collect online gifts.**
- **Confirm next steps for any payroll donors whose gifts automatically renew each year.**
- **Discuss creative ideas for special events and activities.**

Implement

Kick your campaign off with an event that will engage, boost morale, and bring your coworkers together. You can also request a United Way speaker!

- **Ask your campaign team to encourage giving.** What is the top reason people don't make a donation? It is simply because they were not asked.

Sample script:

"I just wanted to come by and drop off this United Way information. Any gift will help people experiencing poverty in our community get the help they need. If you have any questions, please follow up with myself or any of the Campaign Committee members. Otherwise, thank you for your thoughtful consideration to pledge this year."

Be sure to mention if you have set a financial or participation goal and if your workplace offers any corporate matching to encourage them to support the campaign!



- **Encourage giving through payroll.**

Emphasize to your employees that this is the most convenient way to give. By spreading the donation over 24 or 26 pay periods, it eases the financial burden of giving all at once. A payroll gift is recorded on their T4 so its easy at tax time.

- **Hold a mid-campaign update meeting.**

Meet with your committee and your United Way representative, at this point in your campaign, your fundraising should be about 70% to your goal. This is

an opportunity for problem-solving actionable steps and motivating your team, as well as a chance to say thank you!

- **Host a special event to promote the campaign.**

Our popular events includes trivia, lunch and learns, and team challenges to bolster participation.

- **Send a thank you.**

Two days before your campaign ends, send an email reminding people to give, and thank those who have already made a pledge.

Wrap Up

Celebrate the impact you and your colleagues made!

- **Ensure** all pledge forms and donations, including special event funds, are submitted to United Way. Reach out to your United Way contact if you need any support.
- **Announce** your achievement and highlight the impact powered by your colleagues' collective generosity.
- **Thank** volunteers, colleagues, senior leaders, and sponsors for helping you reach your goals.



Starting a workplace campaign is easy and we are here to help you every step of the way.

Questions? Contact United Way East Ontario at Workplace@UnitedWayEO.ca or 613-228-6767.

For more resources to help you get started, visit:
UnitedWayEO.ca/CampaignToolkit.

