

2018 SIMPLE STRATEGIES FOR SUCCESSFUL CAMPAIGNS



United Way
Greater Toronto

WORKING WITH COMMUNITIES IN
**PEEL, TORONTO
& YORK REGION**

10 EASY STEPS TO A SUCCESSFUL CAMPAIGN

- 1 Meet with your United Way staff partner to review past campaign results.
- 2 Assemble a team to help you plan your campaign. Meet with them to clarify expectations and responsibilities.
- 3 As a team, set an attainable fundraising and participation goal.
- 4 Meet to brainstorm what strategies you will use to reach your goals.
- 5 Distribute brochures and pledge forms. Decide whether to accept donations online or where applicable via paper.
- 6 Build excitement with campaign materials and videos. Communicate campaign timelines and information to everyone in your workplace.
- 7 Hold events to share information on the issues facing our region, and how United Way's work is positively impacting our communities. Take part in community events like [UP CN Tower Climb 2018](#).
- 8 Have Ambassadors ask for gifts by canvassing their colleagues. For best results, where possible encourage a one-on-one, peer-to-peer canvassing strategy.
- 9 Collect pledge forms and remit campaign envelopes to United Way.
- 10 Thank volunteers, colleagues, senior leaders and vendors for their participation and for helping you to reach your goals.

We're always here for you.

We're just a phone call away. Your United Way staff partner can help make sure your campaign is a success—call 416-777-2001.

There's even more online.

Review United Way Greater Toronto's Campaign Toolkit for additional information and resources on how to plan your campaign including:

- Inspiring stories about the work of United Way in our community.
- United Way videos to motivate your colleagues.
- Information on the impact of your donation.

**REVIEW OUR ONLINE TOOLKIT AT
[UNITEDWAYGT.ORG](https://www.unitedwaygt.org)**

KEY QUESTIONS

Pre-campaign

- Who will help run your workplace campaign?
- How will you learn about United Way?
- What do your colleagues enjoy about your United Way campaign? How can you ensure your campaign is fun, informative and impactful?
- When is the best time to run your campaign? 1-2 weeks is recommended, plus planning time.
- Would you like to arrange for a United Way speaker video at your kick-off?
- What supplies will you require?—see glossary “Campaign Supplies.”
- What is your campaign goal, and how will you measure dollars raised and participation?
- Is your workplace interested in participating in an event such as [UP CN Tower Climb 2018](#)?
- Are there employees in your workplace who should receive Leadership packages to encourage new and renewing donations of \$1,200 or more?
- Will your organization be giving a corporate gift?

Mid-campaign

- How are you progressing towards your goal?
- Are you facing any unexpected challenges with your campaign? How can your United Way staff partner help?
- Have you encountered any individuals who want more information about United Way or have questions you were unable to address?

Campaign wrap-up

- Do you require assistance completing and remitting your campaign envelopes (Campaign and Special Event) and results form?
- Would you like Thank You Certificates for volunteers?

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CAMPAIGN TASKS

Plan

- Learn about United Way and Campaign Best Practices.
- Utilize your United Way staff partner(s) and fellow team member(s) to help customize your campaign.
- Plan a short campaign to keep excitement and momentum high.
- Create a communications plan; identify and communicate key dates and timelines.
- Identify Leadership targets (gifts of \$1,200+).
- Ensure senior management and labour availability or leverage an existing meeting for a kick-off event.
- Plan team challenges to encourage increased participation.

Execute

- Distribute/email pledge forms on the same day as your campaign kick-off.
- Inform employees about United Way's impact in the community.
- Encourage employees to give early with incentives like an early bird draw.
- Set a deadline to return pledge forms/send follow-up emails via online pledging tool.
- Run special events after pledge forms are distributed.
- Make one-to-one solicitations (as needed) to provide more information and/or clarify any questions.
- Run team challenges to encourage increased participation.

Wrap up

- Announce your achievement and reiterate the gifts' impact.
- Thank donor and volunteers.
- Award prizes.
- Provide information about tax benefits.
- Remit campaign envelopes and the final results form to United Way Greater Toronto.

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CAMPAIGN BEST PRACTICES

Activity	Best practice
Kick-off Event	<ul style="list-style-type: none">• Popular events: breakfast or pizza lunch.• Make the event free of charge so employees do not feel they have donated before they receive their pledge form.• Have a senior executive attend and speak at the event.• Show a United Way speaker video to demonstrate impact of donations.
Build Awareness of United Way	<ul style="list-style-type: none">• Campaign video—available on United Way's website.• Distribute Donor Information Brochure.• Share the Annual Report and other communication tools available on United Way's website.
Early Bird Draw	<ul style="list-style-type: none">• A popular prize is a “day off with pay”—check with your HR department.
Distribution of Pledge Forms	<ul style="list-style-type: none">• Drop pledge forms on employees’ desks with a Donor Information Brochure and a treat.• Personalize pledge packages for greater impact.
Communications	<ul style="list-style-type: none">• Consolidate and coordinate outgoing communications to avoid overwhelming employees.• Promote your corporate match and other incentives to increase contributions.
Canvassing	<ul style="list-style-type: none">• Face-to-face encouragement is always better than email and can be done individually or in a group. People give to people.
Events	<ul style="list-style-type: none">• Hold events after pledge forms are distributed.• Popular events: dress-down days, potluck, silent auctions, bake sale (connect with your United Way staff partner for more ideas).
Recognition	<ul style="list-style-type: none">• Use channels that are effective in your workplace (i.e., parties, gifts, letters, email, presentations, newsletter articles, etc.).• Customize your message to each audience.• Include campaign results and reiterate impact of gifts.• Coordinate United Way certificates for volunteers with your United Way staff partner.
Remit Envelopes	<ul style="list-style-type: none">• Email assistance@uwgt.org and state your Workplace Name & Address, the name of a contact at the organization and the contact’s telephone number.• Upon pick-up, have your United Way staff partner print their name and initial the envelope and then make a photocopy of the initialed envelope and keep for your records

CAMPAIGN RESOURCES

United Way Greater Toronto has many resources that you can use during your campaign. Take a few minutes to review everything available and decide on the resources that will help you achieve your goals more efficiently and effectively.

You can find some of what you need in this package you have received and almost all of it online in the campaign toolkit at unitedwaygt.org

For events and activities

- Videos—campaign videos, speaker videos, thank you videos.

For emails, letters and speeches to ask for support and to thank

- Key messages, stories and fact sheets about United Way's work in the community.
- Donor Impact Statements.
- Annual Report.
- United Way templates for emails, letters and presentations.
- United Way logo and banners.

For support with your communications plan

- Communication strategies.
- Donor Information Brochures.
- Posters and thermometers.

Communication tips

- Find out what inspires you about the work of United Way.
- Use stories to create a personal connection to the impact of United Way and include key messages when asking for gifts.
- Choose themes and content that will inspire your audience and move them to action.
- Share information using existing and effective methods of communication to reach your colleagues.

Managing Campaign Finances

A very important part of running a United Way campaign is handling all the financial details. Use the **2018 Finance Guide** (available on United Way's website), to better understand pledge forms, submit donations, Gift-in-Kind tax receipts, tax benefits, payroll deduction information, special event and licences.

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SAMPLE CAMPAIGN TIMELINE

Pre-launch

- Educate, inspire, and motivate Ambassadors.
- Send invitations for Leadership and kick-off events.
- Post or email United Way workplace campaign support messages from senior management and Labour leader.
- Inform your colleagues about United Way's work in the community.
- Post thermometers and campaign posters.
- Consolidate and coordinate outgoing communications to avoid overloading your colleagues with too many campaign messages.

Pre-Launch				
WEEK 1				
MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY
Leadership Kick-Off	Kick-Off			Mid-Campaign Review
Leadership Canvass				Remit Envelopes
	Early Bird #1	Early Bird #2	Early Bird #3	Early Bird #4
Canvassing				
Communications				
WEEK 2				
MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY
Canvassing				
Remit Envelopes	Event	Remit Envelopes	Event	Wrap-Up Event
Communications				Recognition
				Remit Envelopes

Post Campaign

- Recognize and thank donors, volunteers and suppliers.

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CAMPAIGN GLOSSARY

- Workplace Campaign** A defined period of charitable giving within your workplace.
- Employee Campaign Chair (ECC)** An individual who leads the workplace campaign and their campaign committee.
- Ambassador (Canvasser)** Ambassadors inform their peers about United Way and your workplace campaign. They encourage colleagues to make an informed decision about charitable giving.
- Leadership Donor** Individual donor who donates \$1,200+.
- Kick-off Event** The event that marks the start of your workplace campaign.
- Early Bird Draw** An incentive to encourage employees to complete their pledge form ahead of the deadline.
- Campaign Supplies** Supplies provided by United Way, such as brochures, posters, pledge forms, stickers, etc.
- Pledge Forms** A paper based form, which employees complete for their donation.
- Thermometer** A visual tool to track progress towards your campaign goal.

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PROTECTING DONOR RIGHTS AND PRIVACY

What you need to know as a workplace volunteer

Every year thousands of people from across Peel, Toronto & York Region join United Way's campaign to improve lives and build a better future. We deeply value the trust placed in us by our donors and the communities we serve. We work hard to ensure that trust is well-founded.

We adhere to strict policies that guide how we fundraise and how we protect the privacy of individuals and organizations and we thank you in advance for your support and cooperation in adhering to United Way Greater Toronto's [fundraising](#) and [privacy](#) practices.

How you handle employee campaign information will be determined by your organization's current practices and policies. Your organization may already have clear rules about confidential information related to the campaign. If you have a question or concern about privacy, please contact your Employee Campaign Chair (ECC).

Volunteer practices for donor solicitations

Protecting donor rights and privacy has always been a key priority for United Way. All individuals making solicitations on our behalf must adhere to the following practices in accordance with our Fundraising policy:

- Disclose that they are volunteers with United Way when making solicitations on United Way's behalf.
- Make every effort to respect donors/prospective donors when making solicitations and honour their requests for information and/or limit or discontinue solicitations when unwanted.
- Ensure that fundraising solicitations made on United Way's behalf are truthful and accurately describe United Way's activities and intended use of funds.
- Act with fairness, integrity and in accordance with all applicable laws.
- Immediately disclose to United Way any apparent or actual conflict of interest.
- Do not accept donations that are inconsistent with United Way's mission.
- Disclose how United Way benefits from the sale of products or services in any third-party fundraising arrangements. For example, if your workplace campaign is hosting an employee book sale to raise funds for the campaign, you must clearly articulate the amount of proceeds that go to United Way (i.e., for every \$20 book sold, \$5 will go to United Way).



You can learn more about our commitment to donors, our Code of Conduct and Ethics and other policies and practices that guide our work on our website at unitedwaygt.org

OUR MISSION

United Way Greater Toronto works to meet urgent human needs and improve social conditions by mobilizing the community's volunteer and financial resources in a common cause of caring.

OUR COMMITMENT TO YOU

Each year, United Way's efforts to build a better community are supported by thousands of people across the region. We deeply value the trust you place in us. We work to ensure your gift to United Way is making a difference in our community. Your investment supports local programs and initiatives that help people and families—both today and in the future.



Corporate Office:
26 Wellington St E 12th Floor
Toronto ON M5E 1S2
Tel 416 777 2001 Fax 416 777 0962
TTY 1 866 620 2993

Peel Region Office:
90 Burnhamthorpe Rd. W.
Suite 408, PO Box 58
Mississauga ON L5B 3C3
Tel 905 602 3650 Fax 905 602 3651

York Region Office:
80F Centurian Drive Suite 200
Markham ON L3R 8C1
Tel 905 474 9974 Fax 905 474 0051



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