

# SIMPLE STRATEGIES CAMPAIGN GUIDE

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**United Way**  
Southern Interior BC

# 10 EASY STEPS TO A SUCCESSFUL CAMPAIGN



United Way  
Southern Interior BC

1

Meet with your United Staff partner to review past campaign results.

2

Assemble a team to help you plan your campaign. Meet with them virtually to clarify expectations and responsibilities.

3

As a team, set an attainable fundraising and participation goal.

4

Meet to brainstorm what digital strategies you will use to reach your goal.

5

Decide how you will build awareness and accept donations online.

6

Build excitement by sharing videos and stories digitally. Communicate timelines and campaign information with everyone in your workplace using your company intranet or other digital channels.

7

Hold virtual events to share information on the issues facing our region, and how United Way's work is positively impacting our communities.

8

Have Ambassadors ask for gifts by canvassing their colleagues. For best results, encourage a one-on-one, peer-to-peer canvassing strategy, whenever possible.

9

Thank volunteers, colleagues, senior leaders and vendors for their participation and for helping you to reach your goals.

10

Collect donations and remit funds to United Way.



**REVIEW ONLINE TOOLKIT**

<https://unitedwaysibc.com/get-involved/workplace-campaign/campaign-toolkit/>

# 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.
- Recruit a team of Ambassadors to help with canvassing.
- Develop a communications plan; identify and communicate key dates and timelines.
- Identify potential Leadership donors (gifts of \$1,200+) and plan to encourage giving.
- Ensure senior management and labour availability or leverage an existing meeting for a kick-off event.
- Plan team challenges to encourage participation.



## EXECUTE

- Send online donation links immediately following your campaign kick-off
- Inform employees about the issues facing our region and United Way's impact in the community.
- Encourage employees to give early with incentives like an early bird draw or admission to exclusive campaign events.
- Set a deadline to make a gift and send follow-up emails via online pledging tool.
- Run special events after employees have had the opportunity to make their pledge online.
- Meet virtually with colleagues, one-on-one to provide more information, clarify any questions, and ask for gifts. Your Ambassador team can help with this.
- Run team challenges to encourage increased participation.



## WRAP-UP

- Announce your achievement and share the impact made by your colleagues' collective generosity.
- Thank donors and volunteers.
- Award prizes.
- Remit funds and the Final Results Form to United Way Southern Interior.

## There's even more online.

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

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

# CAMPAIGN BEST PRACTICES

## Activity

## Best practice

### Kick-off Event

- Have a senior executive attend and speak at the event.
- Invite United Way staff to speak about United Way's work in the community.
- Show a United Way speaker video to demonstrate impact of donations.

### Build Awareness of United Way

- Share a United Way video—available on United Way's website.
- Distribute information about United Way.
- Share the Annual Report and other tools available on United Way's website.

### Early Bird Draw

- A popular prize is a “day off with pay”—check with your HR department.

### Communications

- Consolidate and coordinate outgoing communications to avoid overwhelming employees.
- Promote your corporate match and other incentives to increase contributions.

### Canvassing

- Face-to-face encouragement (whether virtually or in-person) is best and can be done individually or in a group setting. If virtual, remember to keep your camera on—people give to people!

### Events

- Hold events after employees had a chance to give.
- Popular events: dress-up days, online auctions, virtual trivia (connect with your United Way staff partner for more ideas).

### Recognition

- Use channels that are effective in your workplace (i.e., email, presentations, intranet articles, etc.).
- Customize your message for each audience.
- Include campaign results and reiterate impact of gifts.
- Post volunteer names online.



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# SAMPLE CAMPAIGN TIMELINE

## Pre-launch

- Educate, inspire, and motivate Ambassadors with online training and engagement activities.
- Send invitations for Leadership and kick-off events.
- Email United Way support messages from senior management and Labour leaders.
- Inform your colleagues about United Way's work in the community by sharing stories and videos.
- Post thermometers and campaign posters on your intranet
- 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 Funds
	Early Bird #1	Early Bird #2	Early Bird #3	Early Bird #4
Canvassing				
Communications				
WEEK 2				
MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY
Canvassing				
Remit Funds	Event	Remit Funds	Event	Wrap-Up Event
Communications				Recognition
				Remit Funds

## Post Campaign

- Recognize and thank donors, volunteers and suppliers.



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# PROTECTING DONORS RIGHTS

## What you need to know as a workplace volunteer

Every year, thousands of people from across the Southern Interior Region join United Way's campaign to fight local poverty 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 Southern Interior'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 Human Resources Department.

## 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 [unitedwaysibc.com/privacy-policy](https://unitedwaysibc.com/privacy-policy)

# OUR PROMISE

**United Way Southern Interior** works to create opportunities for a better life for everyone in our communities.

# 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.



**United Way**  
**Southern Interior BC**

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