



United Way
British Columbia

Working with communities in BC's
Interior, Lower Mainland, Central
& Northern Vancouver Island



VIRTUAL CAMPAIGN PLAYBOOK

Created: April 2020 by United Way Greater Toronto

Updated by United Way British Columbia August 2021

Purpose:

This playbook has been created for Employee Campaign Chairs (ECCs) to use in implementing a virtual or hybrid fundraising campaign. This playbook can be used to address the risks associated with workforce or resource reduction, reduction, elimination or reintroduction of in-person fundraising and engagement opportunities or other crises that might affect face-to-face campaign strategies. Its purpose is to help guide the adaption of campaign planning for a virtual or hybrid world.



**UNITED WE
ARE
STRONGER**

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Preliminary information to think about.

Before starting campaign, here are some questions to get you ready. These can be discussed with your Campaign Manager so you both have a clear understanding what your campaign will look like this year.

- What is happening in your industry?
- What challenges or opportunities are you or your organization facing as a result of COVID or other factors?
- Have you talked internally about running a campaign this year?
- What funding from the campaign may be at risk? (matching gift, corporate gifts, special event proceeds)

- Have you considered any restrictions in the ways people will be allowed to gather physically?
- What are your co-workers asking about?
- What are your thoughts or plans on the Fall campaign period regarding giving and engagement?
- What are your organization's priorities around social purpose?
- How are you connecting with your employees currently, internally and externally, about the charitable causes you support?
- What tools or technology is your organization approved to use to connect internally? Externally?



Strengthening vital connections in your community

The pandemic continues to affect communities across British Columbia. Emergency food providers are still at critical breaking points. Self-isolating seniors continue to face loneliness. Children still face economic barriers to activities and support they need to thrive. Through our partners and donors, United Way British Columbia continues to keep communities strong, even while the pandemic effects remain.

Janet & daughter: Delivering food

A few months into the pandemic, Janet lost her job. With her young daughter to support, she was struggling to make ends meet - especially putting food on the table. Thanks to donors like you we helped Janet access United Way Food Hubs in her area and turned her pandemic story around.

Dolores: Connecting seniors

Before the pandemic, Dolores had a wide social circle. Self-isolation started to affect her more than she realized. She was lonely, depressed and some days, not sure how she would get her groceries. Thanks to the support of donors like you, United Way helped connect Dolores with food delivery services in her area and access to check-in calls to keep her connected.

Samira: Supporting youth

While most kids are getting back to normal routines, many like Samira are still facing economic barriers to getting the support they need. The pandemic has also left many kids and youth feeling worried about their future, loss of education, health, friendships, and social

networks. Thanks to donors like you, United Way helped connect Samira with learning activities, support, and friendships she needs to really thrive.

***Note:** These stories are based on real experiences. Images, names and details have been altered to protect identities. Real examples and stories are shared via our blog at www.uwbc.ca

Your support was critical to helping strengthen vital connections in our community last year. Here are some highlights of the work that you made possible from March 2020 - March 2021:

- **24,000 seniors** across BC received support for almost 760,000 services like grocery shopping, prescription pick-ups and friendly phone and virtual check-ins thanks to over 12,600 volunteers.
- Almost **3.5 million meals** were served, 448,000 grocery hampers delivered and 53,600 grocery vouchers provided at over 152 United Way Food Hubs across the Lower Mainland and Fraser Valley
- Over **42,000 people** were supported through the delivery of almost 134,000 Hi Neighbour postcards offering help with groceries, prescription pick-ups and more in than 40 neighbourhoods across the Lower Mainland and Fraser Valley.
- Almost **73,000 individuals served through 120 mental health programs** including over 23,000 COVID-safe in person contacts and almost 48,000 virtual and 26,000 phone and text check-ins. Over 30,000 youth connected to peers, schools and community.

CAMPAIGN PLANNING



Reminder: United Ways does not endorse specific apps to run virtual special events. Companies should select and approve apps and platforms being used for your campaign based on your own security and company policies.

The virtual or hybrid campaign.

An important first step when planning is verifying what technological platforms are available to you. Explore the following possibilities:

- The opportunity to use **Salesforce Philanthropy Cloud** or **ePledge**.
- The existing technology you have access to, to facilitate team meetings; can all employees access the same tools, or are there variations depending on how your business is set up? This will help best design the experience for all audiences.
- Confirm platforms are secure.
- Discuss how many people can join at one time or the ideal amount you would want in a virtual meeting.

Based on the technologies available, you can adapt your workplace campaign to a virtual or hybrid campaign considering three main priorities:

AWARENESS
EMPLOYEE PLEDGES
SPECIAL EVENTS & EMPLOYEE ENGAGEMENT

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AWARENESS



1. Building Your Team

Every strong campaign starts with a strong team. Consider what roles may need to be added to your campaign committee, or where role descriptions might need to be revised. For example, your committee will still need an ECC, Treasurer, Ambassador Coordinator, however, because campaigns will be relying heavily on technology, your committee may also need:

- IT support – to help run online meetings and online donation support
- Additional communications support for social media, email communications, staff intranet updates
- Virtual kick-off or event leads
- Virtual Team Captain or Ambassador Leaders
- Learning and facilitation support – Awareness will be increasingly important with people not physically together. Consider recruiting a team of volunteers to lead on awareness and engagement opportunities for staff.
- Ask your union to appoint a Campaign Representative. Ideally, this person should be part of the union executive and should be a co-chair of the campaign.

2. Train the Team

Ensure your team knows their role and how to champion United Way.

UWBC will host virtual training sessions for Employee Campaign Chairs (ECCs) and campaign volunteers in August. Each session will focus on a different topic of campaign planning and execution:

- United Way 101 and Campaign Basics
- Campaign Strategies and Best Practices

Training sessions will be recorded and shared in UWBC's Regional Campaign Toolkits so they can serve as a training resource for those who are unable to attend. Each session should take approximately one and a half hours and will include interactive components to encourage active and participatory learning.

UWBC's Regional Campaign Toolkit site has also been updated to contain the most useful resources for running a virtual or hybrid campaign – many of our tools which used to be paper-based are now electronic and available for download.

3. Consider a Coordinated Multi-Channel Campaign

Think about how you can broadly reach out to all levels of employees and locations. Wherever your employees are, whatever medium they engage with, they should get the same campaign message.

Establish a Sense of Urgency - Keep your campaign timeline short – Ideally just a week or two. This is typical best practice but, you need to also consider what works best for you and your co-workers.

Show a Short, Clear Call to Action - Simple cause and effect is best (i.e. Give a Dollar, this is the impact).

4. Having a virtual kick off to clearly mark the start of the campaign.

Considerations for a virtual kick off might include:

- Depending on the size of the organization the “kick-off” might be one large meeting or a series of smaller meetings.
- Determine who needs to lead the meeting – CEO, Leadership Team, United Way rep
- Kick-off should be no longer than 30 mins (or select an ideal time but remember it is more difficult to hold attention for long periods of time virtually).
- If possible, make part of the kick-off interactive. Ideas include running a poll, a Kahoot trivia game, having a virtual speaker or showing a speaker video or using a virtual white board – things to keep the audience engaged.
- A call to action should be embedded in the meeting invitation, or immediately after by providing a link to SPC, ePledge, third-party platform or your own giving platform.
- Where attendance may be an issue consider joining a pre-existing meeting with a captured audience like a town hall or weekly department meeting. You may need to cut down your time in these cases.

*Reminder:
Though many campaign activities can become virtual, it is not as simple as running them online. You need to increase the ways in which people can interact to hold virtual participants' attention.*

EMPLOYEE PLEDGING



Now more than ever, pledging will need to be the focus of workplace campaigns to mitigate loss of revenue from special events. Now more than ever, pledging will need to be the focus of workplace campaigns to mitigate loss of revenue from special events. **(Yes, this is so important we wrote it twice).**

1. Determine the ways employees can make a donation

Questions to think about:

- Do all employees have access to email and/or computers?
- What are alternative ways you can reach employees who might have typically given via paper pledge form.

Giving Options

United Way can support with their own online platforms (like ePledge, Philanthropy Cloud) or can help support using third-party platforms. Consider the following:

- Turn off cash/cheque options in the platform to avoid hassle of cash/cheques needing to exchange hands
- Incorporate writable PDF pledge forms
- Direct mail to home addresses
- Set up a donation hotline

..... GET YOUR UNION INVOLVED



United Way and organized Labour have a strong and long-standing partnership. If your organization is unionized, consider running a joint union and management campaign.

When presenting to a unionized work environment, appeal to our shared values of social advocacy and justice, as well as charitable giving. Have United Way's CLC Labour Participation Department — or one of our high-profile union members serving on the Campaign Cabinet Labour Committee — speak about the United Way/Labour partnership at a union meeting. Make sure they encourage membership support for the upcoming campaign.

Include union logos on all marketing materials produced in-house, with a line noting endorsement from unions if applicable; you can also add a logo to a background when on Zoom or Teams for an event as well as to any presentations you show virtually.

Verbal credits of both union and management support of the campaign also work well. Ensure management credits union support of the campaign and vice-versa.

Other tips for aligning with Labour:

- Are there speaking opportunities for union membership or leadership? Consider inviting a Labour representative from the United Way Labour cabinet or Campaign Labour Associate to speak.
- Ask unions if they would like to run union-specific special events that support the workplace campaign.
- Consider as well, a letter or video of endorsement from the local level.
- Engage the union in their preferred method of communication.

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EVENTS & EMPLOYEE ENGAGEMENT



Creating excitement around the campaign and bringing employees together is still an important part of the United Way campaign. Whether virtually, or together from a distance, team engagement is important as well. Campaigns are filled with favourite events & traditions, and it is worthwhile to see how they can be adapted into the virtual world. As a best practice, entrance to an event should be a pledge to the campaign, whether a gift through payroll or credit card. This reduces the number of times an employee needs to pay a fee and makes it simpler for your committee.

This year UW is focusing on offering both virtual and in-person experiences for workplaces to engage with, primarily in the following three programs – Speakers, Volunteering, and Facilitated Activities. Below are ideas on how to best engage workplaces while ensuring physical distancing can take place and public health measures can be observed.

Although there are several ideas and virtual experiences shared here, we want to ensure that we stay nimble and adaptable moving forward. If you have an amazing idea that you do not see here, let your Campaign Manager or Campaign Associate know! We will do our best to make it happen, and if not, we will look for a suitable alternative.

There are some questions you should ask yourself to establish what exactly is feasible for your organization.

1. UW is planning a number of virtual donor engagement activities e.g. online speakers/speakers' panel, virtual and self-guided tours and virtual volunteer opportunities like online mentoring. Are these activities that you or your employees would have an interest in?

2. Are you offering virtual engagement activities for your employees already, through other charities or internally? If so, what's working? What's not? What would you like to see?
3. What online platforms are you currently using to engage your employees? What has worked well OR do you have a preference?
4. Would you be open to participating or inviting a group of employees to test out virtual engagement and offer us feedback?
5. Of all the examples of virtual engagement we have shared with you - which do you think your employees would respond most favorably to?
6. Would you/your employees be willing to engage in projects that are open to other companies/individuals as well? (related to mass volunteering opportunities)
7. What information do you need from UW to help you in your employee engagement/UW campaign planning?
8. When the region re-opens, we do plan on following up with in-person engagement (and events) - how likely do you think your company would participate? When do you estimate your company will be ready to re-engage in-person?

1. Workplace Special Events

With people working from home, this is a time where you might need fun and interaction with your co-workers. See below for some additional information on this a well.

Some examples of virtual workplace events:

1. Auctions and Raffles (don't forget to get a gaming license!)
2. Games such as BINGO, spelling bees, trivia (eg: Kahoots)
3. Social Media or "Next up" type campaigns – employees can get all dressed up at home (versus casual days at the office) and post pictures of themselves to create awareness about the campaign.
4. Colleague Challenges – eg: similar to the push up challenge, have a Do Something Good challenge where people tag their colleagues to be next up; Planking Challenge
5. Virtual walks/runs
6. Online galas, open mics, talent contests, dance parties and entertainment events (provided by colleagues from their homes)
7. Online learning activities e.g. cook like a chef, flower decorating, learn a new skill, making a cocktail or mocktail (led by celebrity contacts, professional volunteers or colleagues and a list of supplies for participants to buy can be sent or purchased in advance)
8. Gift Card Survivor! Choose a grocery store or an online food delivery service as the prize for the winner who is the last to remain on the "Island".
9. Scavenger Hunt (bring a phone and explore your neighbourhood!) Encourage your workplace to get outside (or stay inside) with this game that can involve their families or roommates. This is a great way to get to know your coworkers, no matter where they are located.

10. Cooking Challenge – what can your team cook with a mystery set of items? Can items be dropped off? Can you encourage your team to clear their cupboards?
11. Food and drink tastings – these can be any kinds of beverages or food items. Make it fun and weird or fun and traditional!

2. Impact Speakers

United Way is known for bringing in Impact Speakers to speak at workplace events who support our organization and the work that we do. Typically, these would be individuals who benefitted from a United Way program, or who perhaps volunteered at a United Way program. Impact Speakers are a great way to share information to donors, both individually and by workplace, about the work that we've been doing in our communities. They are a great way to show the impact that donors' dollars have within community and how they help facilitate making those vital connections.

This year, we'll be sharing out stories of community impact and resiliency, virtually with some limited in-person speaks as well! We will have both pre-recorded and live Impact Speakers available for our accounts. You will be able to download videos via the www.uwbc.ca website (search by region) and share them out to your employees. Additionally, you will be able to book Impact Speakers to deliver virtual speaks to your workplace via the video conferencing platform of your choosing.

These Impact Speaks, even in a virtual environment, are incredibly meaningful and impactful for donors. To remain a donor-centric organization, we want to ensure that you, our donors, can hear about your impact first-hand.

- What types of themes are you interested in? Have focus areas changed in this new environment?
 - We will work with you to try and find the most effective impact speaker for you and your workplace.
- What opportunities, if any, are there for you to involve United Way speakers in virtual meetings at your workplace?
 - Typically, Impact Speakers will join you at your Campaign Wrap-Up or Kick-Off. We want to ensure this practice stays the same; it's a great addition to campaign. We're prepared to dial-in virtually to attend all of your campaign events, and have an Impact Speaker share their story in the process.
- What type of platforms are being used for virtual meetings at your workplace?
- Consider whether a live speaker or video is the best fit to engage your audience.
- Is there an opportunity to have a panel discussion to discuss United Way's work? If so, what issues are the audience most interested in learning about?
- Consider audience size for your virtual events – e.g.: if the group has a large audience, is a video a better fit? If there is a more intimate group, would a live speaker work better to engage the group?

3. Employee Volunteering and Engagement

Volunteering as a team is, for some people, the highlight of their United Way campaign. The feeling of helping people first-hand is an incredibly meaningful experience. This year, you'll still be able to deliver that same impact, and it may be more meaningful to you than ever before.

With the help of our community partners, we will have the ability to invite our corporate partners to volunteer while still adhering to public health measures and maintaining physical distancing. Groups who volunteer will be no larger than 3-5 people in size to ensure a safe space for everyone.

There are three types of volunteer opportunities:

In Community

Weekly Essential Supply Distribution Shifts:

Sign Up: https://www.ivolunteer.ca/need/detail/?need_id=625842

Details & Instructions

- Occurs once a week at UWBC Lower Mainland regional office during office hours.
- Drivers will pick-up their daily delivery allocation of essential supplies including masks, hygiene products or other necessities and deliver them to their assigned list of drop-off sites.
- Connect with Workplace United Way Campaign Manager if you have additional questions about this opportunity.

Monthly Food Security Shifts:

Sign Up: https://www.ivolunteer.ca/need/detail/?need_id=625850

Details & Instructions

- Occurs once a month on a prearranged date and allows teams of 2-10 people based on agency guidelines.
- Opportunities will rotate between the Regional Community Food Hub including those in the Fraser Valley.
- Connect with Workplace United Way Campaign Manager if you have additional questions about this opportunity.

Self-Led

Isolated Senior Outreach

We need your help writing uplifting letters to our local seniors and their caregivers during these trying times. Email info@ivolunteer.ca with subject line SENIORS for specific instructions on how to submit your letter.

Contact your United Way Workplace Campaign Manager for more information.

Essential Supply Contribution

Our community partners are frequently in need of Essential Supplies. Help fill the need by sourcing and contributing supplies from our current list of urgent demand in community. Email info@ivolunteer.ca with subject line ESSENTIALS for details.

Contact your United Way Workplace Campaign Manager for more information.

Guided

Virtual Mentoring Sessions- With a minimum sign-up of 5 presenters and commitment of 3 sessions, this opportunity requires an investment of time and attention. If you and your team are interested in this opportunity, email info@ivolunteer.ca with subject line MENTOR for more details. Contact your United Way Workplace Campaign Manager for more information.

Walk Through Virtual Tours - Please reach out to your campaign manager to learn more about guided virtual tours.

A few questions that we may ask you, in order to effectively gauge what type of volunteer opportunity will be best for your organization, include:

- What are the social distancing policies in the workplace? Will they be changing over the course of their campaign?
- What platforms is the workplace using? (E.g. Teams, Zoom, WebEx)
- What platform does the workplace use to share volunteer opportunities with their employees?
- Is there a volunteer match program at the company? How can this be communicated as a part of volunteer activities with United Way?
- Will the lead times that the workplace needs to promote volunteer opportunities have changed since moving to a virtual environment?
- Has your workplace's volunteer program changed in their virtual environment (eg: are they looking for more volunteer opportunities for individuals to be matched vs. group volunteering?)
- UW will be utilizing an online platform for volunteers to register for projects this year so employees can easily access projects and review UW policies connected to volunteering. Do you have any issues with this process?

Before participating in any UW volunteer engagement activities, be sure to check your organization's health and safety policies, policies for gatherings, and any employee insurance/liability restrictions. Participants

will also likely need to complete a criminal record check online and share their name and contact information.

Please note that for all opportunities - depending on the type of activity and target population - volunteers may be required to submit and clear a criminal record check prior to participation. UWBC offers an online criminal record check for volunteers free-of-charge through the ivolunteer.ca site.



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Physical boundaries create new challenges when designing a workplace campaign, but also new opportunities to work differently, work more effectively, learn and innovate.