



**United Way**  
Waterloo Region  
Communities

# Employee Campaign Manager Toolkit

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2018 Campaign

ARE YOU  
THE ONE?

[iamtheone.ca](http://iamtheone.ca)



[@unitedwaywrc](https://twitter.com/unitedwaywrc)

## THANK YOU for serving as an Employee Campaign Manager (ECM) for the United Way 2018 Campaign!

As an ECM, you have the unique opportunity to harness the generosity, talent and energy of your workplace to give back to our community and help the United Way's efforts in building a stronger, healthier Waterloo Region.

You inspire action, create fun and meaningful experiences. You share impact stories and facts. You gather support from your leaders and your team, and you assemble community champions to build awareness around the issues facing all of us.

You inspire people to give. You give hope to those who need it most. You are changing lives... and YOU are making a bigger impact than you could ever imagine.

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# United Way Impact

United Way Waterloo Region Communities is dedicated to helping people live better lives in every one of the seven communities we serve. We are fundraisers who support a network of agencies whose programs and services are locally focused, informed, connected, and deeply invested in helping people reach their full potential.

## Areas of Impact that United Way Invests in:

### 1. Vulnerable Children and Youth:

Programs and services that allow young people the opportunity to build or enhance their social and educational skills. Adult and peer mentoring, counselling, and education all play a vital role in strengthening youth.

### 2. Poverty:

Services such as emergency shelters, food hampers, and skills development, including financial awareness and literacy, so that people can meet basic needs and move on to fully participate in their place of work, volunteering, or the broader community.

### 3. Neighbourhoods:

Programs and services that increase the skills of community members to build thriving neighbourhoods where people are connected and can engage in things that matter to them. Supported activities such as residence outreach, engagement, and planning give people the tools they need to take action and make a difference in their own neighbourhood.

For more information about Community Impact and the 47 partner agencies that United Way funds, go to:

<https://www.uwaywrc.ca/give/employee-campaign-manager-assets>

## Employee Campaign Manager Role

The Employee Campaign Manager role is essential to the success of the workplace campaign and ultimately, the community. No one individual, social service agency or company working alone can achieve the same impact as when we work together.

As a Campaign Manager, your role includes:

- Providing your colleagues with the opportunity to invest in their community. Encouraging every colleague to give at some level through payroll deduction. In addition, asking those who give to increase their gift because the community needs it.
- Leading and directing the United Way campaign within your organization.
- Motivating your campaign committee and inspiring people to get involved.
- Helping your colleagues understand how their donation directly impacts the 7 communities in Waterloo Region (Cambridge, Kitchener, North Dumfries, Waterloo, Wellesley, Wilmot and Woolwich).

What can you expect from the experience?

- The opportunity to learn and develop leadership skills.
- Develop project management skills and fundraising skills.
- Network with your colleagues and ECMs at other organizations.
- Have fun while helping to support 47 agencies in the community who deliver social services those who need it.
- Deepen your understanding of United Way's role as an issues expert and leading organization.

Thank you for giving your time, to help change lives!

*“ It’s not about how much you give, it’s also about being invested. ”*  
Daniel, United Way Donor

## Campaign Timeline

<p><b>6</b> Weeks Before</p>	<p>Target Date: _____</p> <ol style="list-style-type: none"> <li>1. Meet with your Staff Partner to develop campaign goals and strategies</li> <li>2. Review the previous campaign's performance, determine opportunities and challenges</li> <li>3. Recruit and train a campaign team or committee</li> <li>4. Attend Employee Campaign Manager training with United Way</li> <li>5. Develop your campaign timelines with dates and goals</li> <li>6. Meet with your CEO to confirm their commitment</li> <li>7. Visit our online campaign toolbox for tools and ideas</li> </ol>
<p><b>4</b> Weeks Before</p>	<p>Target Date: _____</p> <ol style="list-style-type: none"> <li>1. Plan your campaign theme and special events</li> <li>2. Set dates for employee meetings and/or presentations</li> <li>3. Ask your Staff Partner about speaking at the meetings and/or presentations</li> <li>4. Request special materials from you Staff Partner (<i>you will receive a starter kit closer to your campaign with all basic materials</i>)</li> <li>5. Talk to your Staff Partner about personalized communications to your colleagues</li> </ol>
<p><b>2</b> Weeks Before</p>	<p>Target Date: _____</p> <ol style="list-style-type: none"> <li>1. Promote your campaign special events, meetings and presentations</li> <li>2. Conduct a leadership giving campaign – one of the best ways to increase the success of your overall campaign</li> <li>3. Send communications from CEO/leadership endorsing or announcing key campaign information</li> </ol>
<p><b>Launch &amp; Mid Campaign</b></p>	<p>Target Date: _____</p> <ol style="list-style-type: none"> <li>1. Kick off your campaign</li> <li>2. Make the ask - Follow up with every employee to encourage and confirm if they have made a pledge. Address their objections</li> <li>3. Make sure everyone receives materials and has an opportunity to give</li> <li>4. Conduct special events</li> <li>5. Share ongoing campaign result updates</li> <li>6. Send follow up e-mails/communications every few days to keep up the enthusiasm and build awareness – make sure to include community facts and impact stories</li> <li>7. Remind people about the end date for the campaign and encourage them to get their pledges in before it wraps up</li> </ol>
<p><b>After Campaign</b></p>	<p>Target Date: _____</p> <ol style="list-style-type: none"> <li>1. Wrap up campaign and collect all pledges. Follow up with those who did not return pledge forms</li> <li>2. Tabulate results and submit all final reports and the campaign envelope to your Staff Partner</li> <li>3. Announce your final results with your workplace</li> <li>4. Thank all contributors with a celebration event, letter, email, gift, etc.</li> <li>5. Connect with your Staff Partner about having a debrief meeting to develop a summary for next year</li> </ol>

## Ambassadors and "Making the Ask"

Ambassadors are an integral part of the campaign team. They help by organizing a kick off, as well as meetings with departments or teams and encouraging employees to give. They also help share the impact of United Way while having fun!

### What do ECMs and Ambassador do to "make the ask"?

- Gain the support of management to help communicate and encourage participation.
- Host a company-wide Campaign Kick Off event.
- Present videos or impact information about United Way at all department staff meetings. Personally invite and encourage people to give.
- Distribute personalized pledge forms (with the top completed for them) to each staff person and invite them to complete it OR use United Way's online e-pledge system so they receive a personal email and link.
- Follow up with every employee to encourage and confirm if they have made a pledge.
- Host special events.
- Thank, communicate results and impact stories.

## United Way Giving Levels

Leadership	Friend	Everyday Hero
<ul style="list-style-type: none"><li>• \$1,200 +</li><li>• \$46 bi-weekly for 26 pay periods</li></ul>	<ul style="list-style-type: none"><li>• \$520 - \$1,199</li><li>• \$19 bi-weekly for 26 pay periods</li></ul>	<ul style="list-style-type: none"><li>• \$365</li><li>• \$1 a day</li><li>• \$14 bi-weekly for 26 pay periods</li></ul>
Impact example: provides 4 individuals with improved basic life skills through reading, writing and financial literacy.	Impact example: provides 10 individuals with supports that reduce isolation and loneliness.	Impact example: provides 45 individuals with increased access to food.

## Leadership Giving

Our Leaders recognize they lay the foundation for strong lives across every part of our region. Consider enhancing your Workplace Campaign with a Leadership Giving campaign.

The number one reason people don't give to United Way is because they weren't asked. Identify those at your organization with the potential to give at the leadership level and ask them for a gift. You could conduct a one-on-one visit, ask them to a leadership event, send a pledge form with a note about the benefits of leadership giving etc.

We can customize a Leadership presentation detailing the value the investment brings to people from all walks of life, opening up inspiring conversations about the importance of philanthropy in Waterloo Region.

To assist existing and potential Leaders who are passionate about leaving their mark and creating lasting change we offer:

- Leadership presentation
- Video & print Leadership donor testimonials
- Local community impact stories
- Help with personalized letters and thank you notes

*“ People ask me why I give and I always answer, ‘Why not?’  
Giving does so much good for everyone.”*  
Mario, United Way Donor

## Handling Objections, Questions & Answers

At some point, a colleague may come to you with one of the questions below; we've included some points to help you address them.

### *I can't afford to give*

- Every circumstance is different, only you can determine what is right for you. Every gift makes a difference and provides vital services to people in our community who need our help. We hope you can participate at whatever level you are comfortable with.
- Payroll giving makes it easy and affordable. By spreading your gift throughout the year it makes a donation less impactful on your budget
- Your payroll gift will be tracked on your T4 and the actual cost of your gift is much less than what you may anticipate.

### *I've already made my gift this year to other another charity*

- Thank you for giving that gift.
- Together we can accomplish more than anyone alone or any one charity. United Way is looking at the big picture – assessing community conditions, investing in focused goals and creating long term changes. By giving any contribution to United Way that you are comfortable with, you are choosing to support the greatest needs in Waterloo Region.
- Every gift matters, no matter what the size.

### *I feel pressured in to giving*

- Giving is a personal decision no one wants you to feel forced to give. It's voluntary. United Way counts on people to give because they understand the needs of the community and because we all want to improve people's lives.
- Everyone should have the opportunity to give and to enjoy the emotional reward that comes from knowing you are part of building a stronger community. Only you can determine what is right for you at this time.

### *I don't use United Way Services so I don't benefit from giving*

- It takes everyone working together to build a strong vibrant community. We win when children succeed in school families are financially stable and our neighbours are healthy. Job loss, loss of a loved one, illness, accidents, disabilities, family problems and growing up and growing old knows no boundaries.



- Your gift ensures that United Way services are available when needed. In fact, people you know may already use programs and services without realizing it. People from all backgrounds benefit from services through United Way partner agencies, including nutrition, education programs, counselling, mentoring, job training and much more.

United Way spends too much on fundraising

- United Way has worked hard to make sure that as much money as possible goes back into the community. In fact, approx. 80% of all funds raised goes back into the community.
- United Way WRC boasts a 5-star rating from the independent website Charity Village.

## Resources and Tools

Please reach out to your United Way staff partner with any questions.

### Employee Campaign Manager Section on our Website:

<http://www.uwaywrc.ca/give/employee-campaign-manager-portal/>

### Impact Speakers

Sharing stories of people who have been impacted by United Way is a great way to help people understand what we do. Speak with your staff partner about booking an impact speaker for your event!

### Make the Month Poverty Simulation:

United Way can facilitate a brief, small group poverty simulator session OR you can simply invite people to click and try it before a team meeting, then communicate the results at the meeting. Who “made the month”, who did not? A great conversation starter.

<http://www.makethemonth.ca/kitchener-waterloo>

### Social Media



@UnitedWayWRC



@UnitedWayWRC



@UnitedWayWRC



## Community Engagement

United Way offers a range of activities that are sure to help your campaign! They are designed to show the impact a donation can have and create awareness with your colleagues. Contact your staff partner for more information!

### Seeing is Believing Tours

A half day tour of one or more partner agencies. Participants are amazed at the work being done in the community, have a greater understanding of what United Way does, on average their donations increase. Creates champions, engages Employee Campaign Managers and committees, increases engagement at a senior leadership level, increases donor engagement and loyalty, a way to help campaign grow.

### Days of Caring

A half day group volunteering experience doing a variety of projects from garden clean-up, painting, sorting supplies, etc. Not typically involved with clients and can be completed within the 3 hour timeframe. Participants feel accomplished and gain a bit of understanding

### Make the Month Poverty Simulation

For 30 minutes to 1 hour, United Way will facilitate a session with a small to medium sized group with a hands-on or online option. Participants gain a greater understanding of poverty through simulations to put you in someone else's shoes, feel the stress of the situation and think about having to make decisions on things that many of us take for granted.

# Finance and Administration

## General Tax Receipting

Before promising a tax receipt to a donor, always check in with your United Way staff partner or the Canada Revenue Agency (CRA) to ensure a donation is receiptable under tax receipting regulations. This applies to any donation, for example, lottery tickets, goods for an auction, casual day donations, etc. One of the most unpleasant tasks a volunteer can face is telling a donor they will not be receiving a tax receipt after all.

United Way must follow CRA regulations to retain our charitable status, unfortunately there are no exceptions.

## What's receiptable?

United Way Waterloo Region Communities automatically issues receipts for donations of \$20.00 or more, provided the donation is voluntary, or given by free will, and is without expectation of receiving something in return.

## Examples of gifts that can be receipted:

- Direct donations made to United Way in the forms of cash, cheque, or credit card. These are receiptable for the tax year in which they are received; however, monthly donations will be receipted at the end of the calendar year.
- Website donations made through [www.uwaywrc.ca/give](http://www.uwaywrc.ca/give)
- Non-cash or gifts in kind such as bequests, capital property, or personal property where the fair market value can be determined.
- Payroll donations where employees are entitled to a tax receipt at the end of the year. The receipt can be provided in ONE of the following ways:
  - Through your T4 slip provided by your organization; OR
  - Through United Way after we have received your final payroll remittance for the year. Note: Your payroll administrator will need to provide us with the name of each payroll donor and the amount deducted for the year.

Check out your T4 slip under Box 46 "Charitable Donations" for your total annual contribution.

### What's not receiptable?

- Donations of business or personal services. (i.e. property rentals)
- A gift where the donor has received some form of material or service incentive to give, for example, a bake sale or BBQ.
- Donation of business merchandise and assets, for example, stock in trade for donors or a business expense.
- Proceeds from auctions or raffles, for example, auctions or raffles of goods or services, or those who buy items at a charity auction (even if the price paid exceeds the fair market value of the item).
- 3<sup>rd</sup> Party receipting, for example, donating an item to an auction.

**Have general inquiries? Need more information? Please contact your United Way staff partner or our office at [info@uwaywrc.ca](mailto:info@uwaywrc.ca) and 519-888-6100.**