

Simple Strategies

Campaign Guide



United Way
Centraide
Simcoe Muskoka

10 Easy Steps to a Successful Campaign

- 1** Meet with your United Way Relationship Manager to review past campaign results.
- 2** Assemble a team to plan your campaign. Meet 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 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 Simcoe Muskoka.

[Click here to review our online Virtual Campaign Toolkit.](#)

Campaign Tasks

Plan

- Learn about United Way and campaign best practices.
- Utilize your United Way Staff Partner 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 virtual kick-off.
- Plan team challenges to encourage participation.

Execute

- If applicable, send online donation links immediately following your campaign kick-off or have your Ambassadors deliver pledge forms.
- 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
- Run special events after employees have had the opportunity to make their pledge.
- 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 colleague's generosity
- Thank donors and volunteers
- Award prizes
- Remit funds and Final Results Form to UWSM

Campaign Best Practices

Activity

Best Practices

Kick-off Event

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

Build Awareness of United Way

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

Early Bird Draw

- A popular draw is a day off with pay - check with HR

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 (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 colleagues have had a chance to give
- Popular events: dress-up days, online auctions, virtual trivia. Connect with your UWSM Relationship Manager for more ideas.

Recognition

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

Sample Campaign Timeline

Pre-launch

- Educate, inspire and motivate Ambassadors with training and engagement activities
- Send invitations for Leadership and kick-off events
- Email UWSM support messages from senior management and Labour leaders
- Inform your colleagues about UWSM's work in the community by sharing stories and videos.
- Post thermometers and campaign posters on your intranet/workspace
- 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

Donor Rights and Privacy

What you need to know as a workplace volunteer

Every year, thousands of people from across Simcoe County and the District of Muskoka 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 cooperation in adhering to United Way Simcoe Muskoka's fundraising and privacy practises.

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 solicitation

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

- Disclose that they are volunteers with United Way when making solicitations on behalf of United Way.
- 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 \$20.00 book sold, \$5.00 will go to United Way).

Our Mission

To improve lives and build communities by leveraging collective resources and mobilizing collective action to achieve the greatest impact.

Everyone in Simcoe Muskoka deserves a chance to lead a good life. This conviction drives thousands of dedicated donors, volunteers and community partners to come together through United Way Simcoe Muskoka to generate the caring power to advance measurable, lasting change in our region – for today’s residents and for generations to come.

When we work together on important community issues, the results are game-changing.



We're creating pathways to prosperity

Poverty touches most aspects of a person’s life from food, shelter, and employment, to mental and physical well-being. This complex issue has a social and economic impact that affects entire communities and everyone who lives there.

It’s not somebody else’s problem. Community challenges belong to all of us. Together, we need to take action and address local poverty head-on.

How can we create a lasting difference in our region? By unleashing our local love – one generous act at a time. Your donation powers UWSM’s crucial work, allowing us to target funds and mobilize on-the-ground efforts to tackle persistent social issues where they start.