



United Way
Sault Ste. Marie &
Algoma District

WORKPLACE CAMPAIGN PLAYBOOK



Your essential guide to planning, promoting
and running a successful United Way
workplace campaign that brings people
together and drives community impact.

EVERY MESSAGE. EVERY CONVERSATION. EVERY CONNECTION

drives change.



PLAN.

Use simple, effective
communication to share
the story.



CONNECT.

Engage and inspire
employees through consistent
and meaningful messages.



MAKE A DIFFERENCE.

Stronger workplaces.
Stronger communities.
A better tomorrow for all.

TOGETHER, **WE CAN** DO MORE.



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Introduction

Thank you for stepping up as a United Way campaign champion in your workplace. Your leadership plays a key role in helping local programs and agencies continue to provide essential support, especially as many in our community face financial pressures.

This guide is designed to help you run a successful and engaging campaign. Inside, you'll find ideas to:

- Highlight community needs and ways to help
- Encourage broad participation
- Plan special events
- Try creative fundraising approaches
- Strengthen partnerships between labour and management

Think of this as a starting point. Feel free to add your own ideas and make it reflect your workplace culture. And remember, your United Way representative is always here to guide and support you.

Together, we can build a stronger, more connected community.

Change takes time, but by working side by side, we can create lasting impact.

Where to Start

The first step to a successful campaign is simple: don't do it alone. Build a small team of colleagues to help plan and carry out your campaign. Even a few committed people can make a big difference.

Why a Team Matters

- **Shared Workload** - Campaigns run smoother when tasks are divided up.
- **Broader Reach** - Having representatives from different departments ensures everyone feels included.
- **Different Skills** - IT, communications, and leadership all bring unique strengths.
- **Higher Participation** - Employees respond when they hear from trusted peers.

Suggested Roles

- **Campaign Chair** - Main organizer and contact with United Way.
- **IT Support** - Helps with digital tools and online giving.
- **Communications Lead** - Shares updates through intranet, email, and newsletters.
- **Events Lead** - Organizes campaign events and activities.
- **Leadership or Retiree Giving Chair** - Encourage deeper engagement and special giving levels.



Pro Tip: Don't stress about filling every role. Start with the people who are excited to help. Enthusiasm is the most important asset your team can have.



Building Awareness

A key step in your campaign is generating excitement and showing the impact of United Way in our community. When colleagues see the difference their support makes, they are more likely to get involved. You can build awareness in several ways:

DIGITAL COMMUNICATIONS

United Way provides ready-to-use digital tools you can share through your workplace channels:

- Digital screen content (TVs, computer home screens)
- Stories for internal newsletters, intranet, or payroll inserts
- Sample kick-off and reminder emails
- Employee brochures, impact reports, and one-pagers on local issues
- Suggested social media posts

CAMPAIGN KICK-OFF PRESENTATIONS

A campaign kick-off is one of the most effective ways to launch your workplace campaign. It:

- **Creates momentum** by marking the official start of your campaign
- **Inspires giving** by sharing the impact of donations
- **Builds team spirit** by bringing colleagues together around a common cause
- **Demonstrates support** from senior leaders, unions, and management.

Your United Way representative is here to support you and can help you plan and customize your kick-off event. We have created tools and resources to support you in hosting your campaign kick-off.





KEY TIPS FOR KICK-OFF PLANNING

1. **Choose your format:** in-person, virtual, or hybrid.
2. **Use your Kick-Off PowerPoint:** we'll help you tailor it to your workplace.
3. **Send a Save-the-Date:** give notice so employees and leaders can attend.
4. **Involve leadership:** CEOs, executives, and union leaders can endorse the campaign live or via video.
5. **Keep it short:** aim for 30 minutes or less. Larger workplaces may need multiple sessions.
6. **Set your agenda:** include your Campaign Chair as facilitator, United Way staff, and a senior leader.
7. **Make it interactive:** consider polls, quizzes, or activities.
8. **Share real stories:** use videos, impact speakers, or local examples to show results.
9. **End with action steps:** explain how to donate or get involved, and send links immediately after.
10. **Promote upcoming events:** share your campaign calendar early.





EXAMPLE KICK-OFF SCHEDULE

Opening: 5 minutes Time: CEO / Campaign Chair / Union President / United Way Staff Representative	• Welcome • Value of UW and company partnership • Importance of supporting United Way now • Encourage everyone to get involved with campaign activities • Interactive poll or quiz to get people involved
United Way Awareness Activities: 7-10 minutes Facilitated by United Way	• UW and company quiz • Group sharing “why I care about the community”, “this statistic resonated with me” etc. • UW videos • Guest speaker from United Way
Closing Remarks: 5 minutes CEO / Campaign Chair / Sr. Leaders / Union President	• CEO or Campaign Chair to thank participants and reiterate the importance of supporting UW • Call to action / donate now • Share company fundraising / participation goals and any matching opportunities • How to donate • Instructions on next steps (link to donate, who to contact if you have questions, etc.)



ENGAGING YOUR COLLEAGUES THROUGH STORIES & EXPERIENCES

Engagement activities give employees a chance to see how their donations create impact while also building team spirit. These activities help bring United Way's work to life and can boost morale across your workplace.

Examples include:

- **Making choices:** an interactive simulation that builds empathy for families living on the edge of crisis.
- **Make the month:** an experiential tool showing how poverty affects health and wellbeing.
- **Impact Speakers:** hear real stories from people whose lives have been changed through United Way.
- **Days of Caring:** hands-on volunteer opportunities, like writing letters to isolated seniors, creating hygiene kits for people experiencing homelessness, or assembling craft kits for after-school programs.

 **Pro Tip:** Pair engagement activities with your campaign kick-off or special events for even bigger impact.

BUILDING & TRAINING YOUR TEAM

A strong campaign starts with a strong team. Think about the roles that could help make your campaign run smoothly, such as:

- IT support (for virtual meetings or online giving)
- Communications (social media, emails, intranet options)
- Kick-off or event leads
- Department or site leads
- Leadership Giving Chair
- Retiree Giving Chair

 **Did You Know?** Campaigns with a broad committee (including IT, comms, and leadership roles) typically see higher participation rates.

United Way offers guides, templates, and online resources. Your staff representative can also lead a training session for your committee.

Keep your team energized by celebrating milestones along the way. A quick thank-you email, shout-out in a meeting, or small token of appreciation can go a long way in keeping momentum strong.

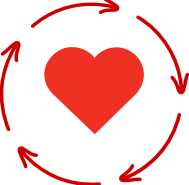




Employee Giving

Now more than ever, your employee giving program will be the central focus of your campaign. United Way can provide giving options that work best for your work environment.

Consider the following options: Fillable PDF Pledge Form, Paper Pledge Form, Perpetual / Continuous Giving, Gifts of Securities.

	Fillable PDF Pledge Form A digital version of the traditional paper pledge form. Employees can complete it on their computer, save as a PDF, and send it directly to their campaign chair.
	Paper Pledge Form Still available for workplaces without virtual access. To make things easier, provide pre-addressed envelopes for quick return to the Campaign Chair.
	Perpetual / Continuous Giving Payroll donations automatically renew each year until changed by the donor. Consider offering incentives for employees to increase their gift this year.
	Gifts of Securities A tax effective way to donate, since capital gains tax is eliminated. Share United Way's Securities Form to promote this smart giving option.

 **Pro Tip:** Campaigns that highlight multiple giving options see higher participation. Make sure your employees know all the ways they can contribute.



AMBASSADORS & CANVASSING

Ambassadors are key to the success of every campaign. These volunteers approach their peers to raise awareness about United Way's vital role in the community and invite them to make an informed choice about supporting their community.

Ambassadors share 3 key messages:

1. **Inform** of the benefits United Way brings to our community and promote the campaign and activities.
2. **Ask** peers to consider supporting community through United Way.
3. **Thank** colleagues for their time and participation.

The most effective method of canvassing is done in person, either one-on-one or with a group. Encourage ambassadors to reach out to their peers so they can engage in a dialogue about the campaign. It's important to ensure campaigns are inclusive and every employee has an opportunity to participate. Campaign Ambassadors ensure that whether employees are working virtually or in person, each employee is personally invited to help your workplace reach its goal to help our community.

LEADERSHIP GIVING

With a gift of \$100+ / month, or \$1,200+ annually, our Leadership level donors are ready to drive change, and willing to set a powerful example and become part of the solution to our community's complex social issues. United Way Leaders are passionate about leaving their mark on Sault Ste. Marie & Algoma District by creating lasting change. Grow your Leadership Giving Program.

Grow Your Leadership Giving Program

- Host a Leadership event and invite a United Way Leadership speaker. Have Ambassadors who are Leadership donors themselves follow-up with event attendees.
- Provide special incentives like giving a day off work for new donors giving at the Leadership level or increasing their Leadership gift by 10% over the previous year.
- Recruit a Leadership chair for your campaign committee to grow your Leadership donor program, by arranging your Leadership presentation, monitoring Leadership giving results, making personal outreach to ask for support and ensuring donors are thanked and recognized.





EMPLOYEE PLEDGE PARTICIPATION INCENTIVES

Offering incentives can dramatically increase participation. Incentives can also be used to motivate early bird donations, new and increased giving, Leadership giving, continuous payroll, etc.

Prize Ideas

- Extra vacation day or early release before holidays
- Free admission to company events, facility passes, or cafeteria credits
- Electronics (headphones, smart speakers, etc.)
- Lunch or golf with the CEO / Executives
- Gift cards or local brewery / winery packages
- Premium parking spots

Fun Challenges

- CEO / Executives take on a fun challenge (grow a beard, shave their head, pie in the face) if the team hits a goal
- Organization-wide reward if participation reaches x%
- Tiered raffle system (extra entries for leadership gifts, early pledges, or hitting multiple criteria).

Pro Tip: Keep incentives fun, simple, and aligned with your workplace culture. Small rewards paired with recognition often go further than big-ticket items.

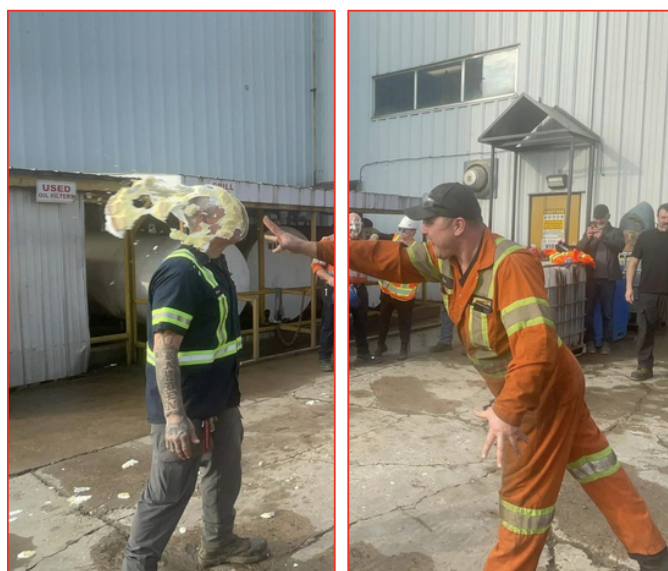
RETIREE ENGAGEMENT

Retirees remain an important part of the United Way family. Many stay connected to their workplace and community, and often just need to be asked.

Ways to Engage Retirees:

- Send personalized letter from the campaign committee, ideally followed by outreach from a fellow retiree.
- Ask HR if donations can be deducted from pension payments.
- Add a monthly giving form to off-boarding packages
- Share United Way's sample letters and resources in retiree info materials.

Did You Know? Retirees are some of the most loyal United Way donors - when included in campaigns, they often give at higher rates than current employees.





Special Events

Special events bring employees together, add excitement to your campaign, and create opportunities for fun team connections. After your pledge drive, consider hosting a fundraising event that fits your workplace culture.

CHALLENGE-STYLE EVENTS

Friendly competitions are a great way to boost engagement. Make challenges meaningful. People are more likely to donate if there's a real effort involved.

- Fitness challenge (5K run, push-ups, squats, laps, hiking)
- Creative endurance challenge (Zumba, dancing, distance goals on fitness equipment)
- Sponsored "commitments" (e.g., for every \$10 raised, commit to a task).

PARTICIPATE IN A UNITED WAY SIGNATURE EVENT

- Big Cup Scramble golf tournament
- Backpacks for Success
- Period Promise

HEALTH & WELLNESS THEMED EVENTS

Partner with your workplace's wellness committee, they may even have a budget for incentives.

- Run / Walk / Roll event
- Group fitness or yoga class
- Healthy living challenges (steps, hydration, meal prep contests)

OTHER FUN IDEAS

- Golf tournament
- Trivia night
- Cooking lessons or "Master Chef" style competition
- Escape room
- Bingo or card tournament
- Movie night
- Pay to play Bingo

CONTESTS

Add a competitive twist with prizes and draws:

- Online or in-person auction
- Raffles (50/50, gift baskets, extra vacation day)
- "Key to the box" challenge with mystery prizes
- Wine or Gift Card Survivor

 **Did You Know?** Events tied to wellness and team-building often see the highest turnout because they combine fun with positive benefits.

TOP 5 QUICK WINS FOR SPECIAL EVENTS

1. **Casual Day** - Donate \$5 to wear jeans or a themed outfit
2. **50/50** - Always a crowd-pleaser with minimal setup.
3. **Treat Sale** - Sell coffee, baked goods, or snacks at break time.
4. **Trivia Challenge** - Quick virtual or in-person game with small prizes
5. **Gift Basket Raffle** - Ask each department to contribute items to a themed basket.



Creative Fundraising

Think beyond employee pledges! There are many ways your workplace can generate additional funds and show community leadership.

CORPORATE & SPONSORSHIP OPPORTUNITIES

- **Sponsorship** - Ask your United Way representative for a sponsorship package to explore opportunities that fit your company.
- **Budget Savings** - Redirect savings from events, meetings, or catering toward your workplace campaign.
- **Vendor & Supplier Support** - Request incentive prizes, auction items, or in-kind donations. Suppliers may also consider direct sponsorship or financial gifts.
- **Property / Service Exchange** - If your company provides a space or service (e.g. film company uses property), ask for a donation in place of payment.

MATCHING & INCENTIVES

- **Volunteer Matching** - If your company matches employee volunteer hours with a donation, highlight it! If not, explore the option.
- **Donation Matching** - Double the impact by matching employee gifts dollar-for-dollar or up to a set amount.
- **Survey Incentives** - Tie employee participation in workplace surveys to a corporate donation at a set dollar value.

CUSTOMER & COMMUNITY ENGAGEMENT

- **Point of Sale Campaigns** - Dedicate a portion of sales to United Way. Great for online transactions or retail settings.
- **Online Conversions** - If your business encourages clients to switch to digital billing or mobile banking, donate a set amount to United Way for every successful conversion.

RECYCLING & COLLECTION DRIVES

- **Bottle Drives, Scrap Metal, or Hazardous Waste Collection** - Donate the refunds or rebates back to United Way

 **Pro Tip:** Highlight Creative fundraising in your external communications. Customers love to see businesses investing in their community.

 **Did You Know?** Matching gifts are one of the most powerful motivators. Companies that offer them often see doubling in employee participation rates.



Labour Engagement

United Way and Organized Labour have a proud history of working together to strengthen communities. Union members and their families are donors, volunteers, and participants in programs supported by United Way.

Joint Union - Management campaigns are an inclusive way to engage everyone in unionized workplaces.

WAYS TO STRENGTHEN COLLABORATION

- **Secure Endorsement**

Ask union leadership for visible support. Ideas could be through a letter, a verbal endorsement at meetings, or a shared message with company leadership.

- **Include Union Representation**

Invite a member of your Local Union Executive to join the campaign committee, or ask leadership to appoint a representative. This ensures employees know they are included.

- **Shared Incentives**

Encourage both Union and Company to contribute prizes or perks, such as parking spots, lunch with the Union President or CEO, or branded swag.

SAMPLE JOINT MESSAGE FROM LEADERSHIP

To Our Employees,

We are proud to stand together - Union and Management - in support of this year's United Way workplace campaign. United Way has long been a partner in strengthening our community, supporting programs and services that many of us, our families, and our neighbours rely on.

Your participation in this campaign makes a real difference. Whether through a donation, volunteering, or taking part in events, every contribution helps build a stronger, healthier community for everyone.

As leaders, we are united in encouraging you to get involved. Together, we can show the power of collective action and make a lasting impact.

Thank you for your support.

[CEO / Executive Name]

[Title]

[Union President Name]

[Local / Union Title]

 **Pro Tip:** Campaigns that show joint support from both senior management and union leadership often see higher trust, participation, and overall results.

 **Did You Know?** Many of United Way's strongest campaigns nationally are in unionized workplaces where both union and management lead together.



Saying Thank You

Recognizing donors and volunteers is one of the most important steps in your campaign. A sincere thank you builds goodwill, encourages future participation, and shows the real impact of giving.

SIMPLE WAYS TO SAY THANKS

- **Email or Card** - Send a thank you email or mail a physical card (United Way can provide physical cards).
- **Phone Call** - A quick, personal call goes a long way.
- **Video Message** - Record a short video of yourself or the CEO expressing gratitude.
- **Social Media or Intranet Shout Out** - Celebrate your team online with a group thank you post.

CREATIVE TOUCHES

- **Porch Drop / Mail Package** - Send small treats, care kits, or tokens of appreciation
- **Impact Highlights** - Share how donations made a difference.
- **Company-Wide Thanks** - Post a thank you note on internal TV screens, in newsletters, or letters from leadership (templates available).

 **Pro Tip:** Thank people more than once, and in more than one way. A mix of digital and personal thanks feels the most genuine.

 **Did You Know?** Donors who feel appreciated are far more likely to give again and often increase their gift the following year.

