

I care
I give
It matters

J'y crois
Je donne
C'est important



Government of Canada Workplace Charitable Campaign

Campagne de charité en milieu de travail du gouvernement du Canada

GCWCC CAMPAIGN GUIDE 2025



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**GCWCC
CAMPAIGN
GUIDE**



GCWCC CAMPAIGN GUIDE

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CONTEXT AND BACKGROUND

At its core, a workplace campaign is a collective effort within a company to channel resources toward philanthropic endeavours. **This goes beyond simple charity – it's about creating a shared sense of purpose and responsibility among employees.** By understanding the purpose behind workplace campaigns, organizations can unlock their potential for positive social impact and community engagement. You'll also meet new people, build your network, and develop new skills!

In today's office landscape, workplace campaigns are powerful instruments for community impact and building camaraderie among colleagues. These initiatives, designed to rally employees around charitable causes, contribute to meaningful social change.

This guide is meant to provide instructions for every aspect of the Government of Canada Workplace Charitable Campaign (GCWCC) so that your campaign is the best it can be!

Thank you for taking the initiative and volunteering your time for this campaign. Your leadership in your workplace to support your community is sincerely appreciated.



THE GCWCC NATIONAL OFFICE IS HERE TO SUPPORT YOU.

If you have any questions, please contact team-equipe@gcwcc-ccmtgc.com



WHAT IS THE GCWCC?

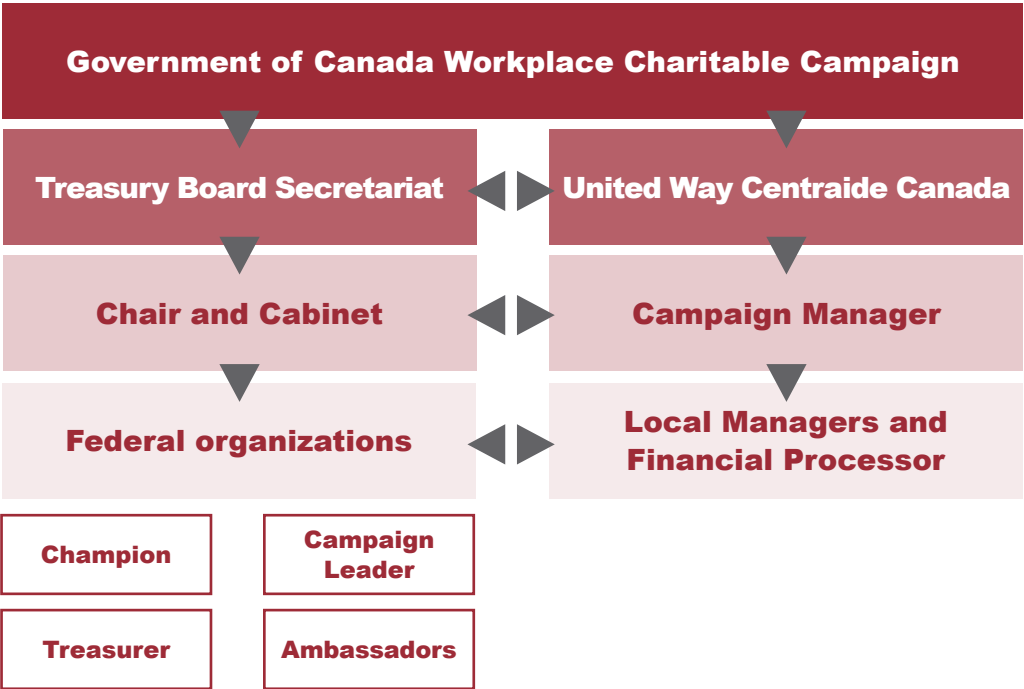
The Government of Canada Workplace Charitable Campaign (GCWCC) engages federal public service employees and retirees in a combined effort to raise funds and help people in communities across Canada. The campaign is led for employees, by employees. It is an extension of what the public service does: improve the lives of Canadians in communities across the country. This is done by supporting United Way Centraide, HealthPartners and other registered Canadian charities to build stronger communities and healthier people across Canada.

From its inception in 1997, the GCWCC has been Canada's largest workplace charitable campaign. The GCWCC is an annual campaign that generally takes place in federal government workplaces across the country from September to December.

During this time, Federal public service employees, retirees, as well as current and former members of the Canadian Forces and the RCMP, support their local communities through charitable giving.

The campaign is managed by United Way Centraide Canada (UWCC), who are your experts in workplace charitable campaigns. They hold an agreement with the Treasury Board Secretariat of Canada and work closely with a GCWCC Chair and Co-Chair for the day-to-day aspects of the campaign.

GCWCC GOVERNANCE AND CAMPAIGN MANAGEMENT



As a trusted community partner, United Way Centraide Canada (UWCC) manages the campaign under an agreement with the Treasury Board Secretariat of Canada (TBS). Operational management is delegated to United Way Centraides (UWC) across Canada, who work under the guidance of UWCC.

The GCWCC National Office works closely with the GCWCC Chair, who is responsible for the successful execution of the campaign, supported by the National Cabinet.

Each government organization may set up its campaign structure to canvass for pledges and run its own events and activities. More details on this can be found in the [Campaign Structure section](#).

GCWCC Chair

The Chair is a senior government official who is responsible for the successful execution of the annual campaign. Their main responsibilities are to:

- Provide direction and structure to the National Office.
- Make key decisions concerning the annual plan.

GCWCC National Cabinet

The National Cabinet provides direction and guidance on the vision and objectives for the Campaign. It is made up of senior leaders across federal organizations, led by the GCWCC Chair. **Members of the Cabinet engage their peers, provide strategic guidance, and encourage senior executives to offer support and sufficient resources to their campaign teams.**



All regions of Canada are represented at the National Cabinet to provide a common direction for the campaign and offer support to federal organizations across the country.

The National Cabinet is supported by the National Chair's Office. As well, the GCWCC management team works closely with the National Cabinet to provide support and recommendations.

GCWCC National Office

The GCWCC National Office is mandated by UWCC to manage the campaign nationally.

The main responsibilities of the GCWCC National Office are to:

- Develop campaign fundraising and engagement strategies.
- Develop communications strategies and plans in collaboration with the Chair.
- Provide strategic advice, guidance, and best practices to the National Chair, Chair's office and National Cabinet Members.
- Collaborate with the Chair and TBS to ensure the campaign is compliant with public service requirements and specificities.
- Develop, coordinate, produce, and deliver all campaign communication products.
- Provide training and direction to local GCWCC Managers to ensure the consistent delivery of approved campaign strategies and approaches across Canada.

GCWCC Local Managers

The GCWCC Local Managers are fundraising professionals assigned to support campaigns in each region. Their role is to offer training and advice, support the implementation of action plans and strategies, and provide the tools, guidance, and engagement support needed for your campaign to succeed.

While they are assigned within the local United Way Centraides, as GCWCC Local Managers, they represent both Named Recipients within the GCWCC.

These Local Managers report to the GCWCC National Office to share progress, challenges, and successes.

The main responsibilities of the GCWCC Local Managers are to:

- Help you plan and execute the campaign successfully: by helping to train volunteers, providing strategic advice, monitoring your campaign progress and sharing best practices.
- Provide tools to help you run your campaign, such as impact stories and speakers, volunteer training, third-party platforms, and more.
- Process local funds received.

GCWCC Financial Processor

UWCC delegates financial processing to United Way East Ontario (UWEO). UWEO hosts the online donation platform (ePledge) and the Andar event payment platform. The main responsibilities of the Financial Processor are to:

- Send confirmation emails and/or tax receipts, as they are the issuing charity.

NOTE: All donations are always sent to where they were designated.

- Contact donors regarding any central donation/pledge processing questions.

NOTE: Paper and PDF fillable gift forms are processed by the GCWCC Local Manager.



If you or a donor requires support, please contact:

Epledge_support@unitedwayeo.ca



The Named Recipients

Named Recipients are charities that have been selected by the Treasury Board Secretariat to receive equal and exclusive prominence in campaign materials and at events. The two Named Recipients are HealthPartners and United Way Centraide. Both have complementary roles in serving Canadians in need.

Together, they're building stronger communities and healthier people across Canada, which allows them to have a significant impact on improving the lives of Canadians. Similar to the federal government, they are working to improve the lives of Canadians in all our communities from coast to coast to coast.

Each is an expert in their respective impact areas. They use research, local knowledge, and community partnerships to make informed investment decisions and to maximize the impact of donor dollars.

Each has a national presence while being able to create impact in individual communities and has a positive reputation within the Canadian charitable sector.

The Named Recipients are responsible for:

- Providing or helping to create content that raises awareness about their impact in communities across Canada, through media such as stories, photos, and videos.
- Reporting on the impact of public service donations.
- Providing speakers and other resources to showcase their work at GCWCC-related events.
- Providing content for the training of GCWCC volunteers.

If you are looking for content or speakers, please reach out to your GCWCC Local Manager.

Ultimately, the Named Recipients are there to showcase the impact of donations and support the public service in their goal to improve the lives of Canadians in all our communities across the country.

As Named Recipients, all GCWCC event revenue is divided proportionally amongst them.



United Way Centraide



United Way
Centraide

United Way Centraides (UWC) serve more than 7.3 million people in 5,000 community agencies across Canada every year, helping to improve lives from coast to coast to coast. Locally and nationally, the goal is the same – to create a more equitable future for all.

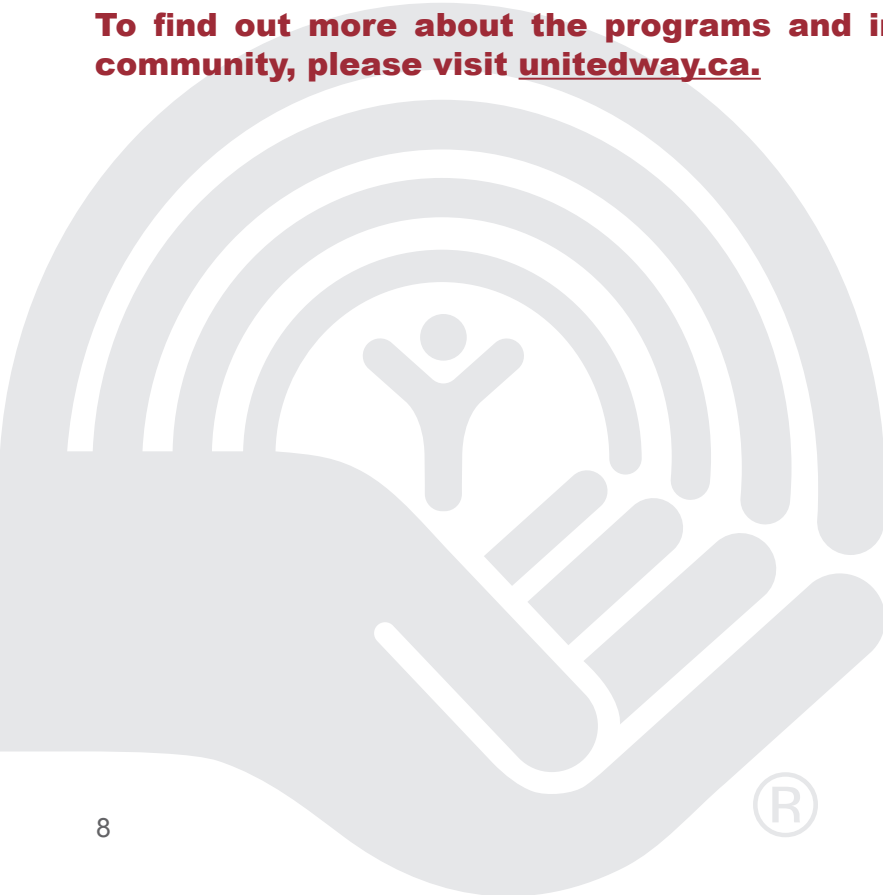
UWC brings people and organizations together to meet immediate needs and tackle the complex social issues at the root of those needs.

UWC's work focuses on three key strategies to improve lives locally and build a brighter future for everyone:

- Moving people from poverty to possibility
- Helping kids be all they can be
- Building strong and healthy communities

With your support, opportunities are created for everyone in our communities to live a better life. Donations stay in your community, creating lasting, positive change in the very place where you live and work.

To find out more about the programs and initiatives supported by UWC in your community, please visit unitedway.ca.



Focused on health. Driven to make a difference.

HealthPartners harnesses the power of workplace giving to raise funds for 20 of Canada's most respected health charities, including the Canadian Cancer Society, Heart & Stroke, and Diabetes Canada.

A donation to HealthPartners helps fuel:

- **RESEARCH:** keeping researchers on the cutting edge of fighting disease by discovering treatments and cures.
- **EDUCATION:** giving Canadians trusted information on all aspects of managing and coping with chronic disease and acute health conditions.
- **PROGRAMS & SERVICES:** enhancing the quality of life for Canadians affected by chronic and acute health conditions.
- **ADVOCACY:** reducing barriers by improving health policy and access to care.

HealthPartners' charities serve Canadians from coast to coast to coast. Your donation will help save lives and will contribute to better health outcomes for all people in Canada.

Together with donors and volunteers, HealthPartners are creating a healthier Canada.

Learn more at healthpartners.ca





CAMPAIGN PARAMETERS

There are specific requirements you must follow when planning your organization's workplace charitable campaign. Please review below:

1. Named Recipient parity, exclusivity and prominence

As per the agreement with the Treasury Board Secretariat, only the Named Recipients – HealthPartners and United Way Centraide – may be featured in communications and events, and are the only charities invited to GCWCC events.

2. Fund allocation

All funds raised at awareness, campaign, inter-organizational, major, or signature events in the workplace will be shared among the Named Recipients based on an agreed-upon formula.

Important: Event funds cannot be designated to other registered charities (ORC). As per the Treasury Board Secretariat – United Way GCWCC Agreement, all event funds are allocated to the Named Recipients.

3. Licensing

Depending on your province, charitable gaming activities, such as raffles and bingo, require a license. You must work with your GCWCC Local Manager to determine and secure the required licenses and ensure proper processing of funds raised.

4. Charitable receipts

Specific requirements must be met for a charitable receipt to be provided. In the GCWCC, only peer-to-peer events are eligible for charitable receipts. If you are unsure whether the event or any aspect qualifies for a charitable receipt, reach out to your GCWCC Local Manager for guidance.

5. Event platforms

You must consult with your GCWCC Local Manager to determine which web-based event platforms will be used. You will likely need to consult with your own workplace's IT security team as well to ensure that employees can access the platforms.

Note: You are not allowed to create or use web-based platforms not offered by your GCWCC Local Manager without prior approval.

6. Data security

Any digital platforms used to host an event must host the data in Canada and comply with the Direction for Electronic Data Residency.

If you have any questions, please reach out to the National Office Team at:

team-equipe@gcwcc-ccmtgc.com

A NOTE ON ACCESSIBILITY AND OFFICIAL LANGUAGES:

All events are to conform with legislation, policies and standards that apply to accessibility for public servants, such as the Accessible Canada Act and Regulations and the accessibility Strategy for the Public Service. Official languages

All events must respect the language rights of federal public service employees, the Official Languages Act, the TBS Official Languages Policy, the Directive on Official Languages for People Management, and the Directive on Official Languages for Communications and Services.

CAMPAIGN STRUCTURE

Effectively organizing a successful workplace charitable campaign requires a solid structure of volunteers, particularly if it is run in multiple offices across the country.

While there isn't a "one size fits all" structure, there are general guidelines that you can follow to ensure the most successful campaign. Beyond that, we encourage you to reach out to your GCWCC Local Manager, who, in conversation with you, will be able to assess your organizational structure and recommend a tailored campaign structure based on your needs.

Further below is a general structure outline that can be adapted based on the size and geographical spread of your organization. Smaller workplaces may have the same person take on multiple roles, while larger workplaces may have several people dividing a role. For example, you may have one Campaign Leader in a particular region for your organization, supported by Ambassador Leads for each designated worksite.

Fundamentally, the most important thing to keep in mind is that you should have at least one representative who is physically present in each of your primary locations. If you are to only have one person in each of these locations, they should take on the role of Ambassador.

The key roles (in order of importance) in the campaign are:

1. Champion

This is a member of senior management who champions the campaign and ensures the management team is supportive of the campaign. They are there to engage their executive colleagues. One Champion may be appointed nationally, or one per region may be appointed. This is a critical role because without senior leadership support and authorization, the campaign simply won't happen in your organization.

2. Campaign Leader

The Campaign Leader is also known as the "heart" of the campaign. Effectively, this is the operational manager of the campaign, responsible for the full scope of the portfolio and making sure all elements of the campaign are successfully executed. They will provide updates to the Champion and will delegate tasks to the Ambassadors and Event Coordinators. They will work closely with their Treasurer to ensure proper procedures are followed.



3. Ambassador

The Ambassador is responsible for raising awareness about the campaign to their colleagues and ultimately to canvass them for donations. They are essential because they are the ones engaging with your entire organization: answering questions, raising awareness, and effectively being the “face” of the campaign. Every employee should have a direct interaction with an Ambassador throughout the campaign. Therefore, you will want to focus on having several Ambassadors as well as ensuring a strong Ambassador presence.

Depending on the size of your organization, you may also opt to have an Ambassador Lead who is the point of contact for the Ambassadors and the liaison between them and your organizational campaign team.

4. Treasurer

The Treasurer is responsible for all financial aspects of the campaign. The primary Treasurer(s) will have mandatory training to attend before they are granted access to the reporting systems. This training ensures they understand the system and are aware of the implications of having access to this information.

5. Event Coordinator

The event coordinator is responsible for coordinating events and activities that a federal organization may host to supplement and/or celebrate fundraising efforts. A full step-by-step event guide is available for the event coordinator [here](#).

6. Optional: Communications Officer

Communication is essential for any project, so having a Communications Officer who can serve as a direct liaison between your team and the Communications branch in your organization will help ensure communications are compliant and handled as expeditiously as possible. Ideally, this role has management authority in your organizational communications team.



Please refer to the [Volunteer Roles and Responsibilities](#) section for more details on their expectations.



Parallel to these government volunteer roles, you also have the GCWCC Local Manager, your free resident expert on workplace charitable campaigns!

You do not need to recruit them; they are available to you as soon as you start the planning process, and throughout your entire campaign journey, you can find your GCWCC Local Manager on the GCWCC volunteer resource website or by contacting **team-equipe@gcwcc-ccmtgc.com**

How do these roles interact with each other? The Champion is the “head” of the campaign in your federal organization; below them is/are the Campaign Leader(s). We recommend, if possible, having a Campaign Leader for each region your organization has a presence in. The Campaign Leader should be in regular contact with the GCWCC Local Manager in their region. The Campaign Leader’s team is made up of a Treasurer, Ambassadors and an Event Coordinator. If there is a Campaign Leader in each region, ideally, you have Ambassadors in each region as well, at a minimum. You may also have a Treasurer and/or an Event Coordinator in each region, depending on the size of your federal organization.



VOLUNTEER ROLES AND RESPONSIBILITIES

In this section, we will dive further into the roles and responsibilities for each volunteer. Keep in mind that if your workforce is distributed across multiple locations, having representatives (Ambassadors) or a regional structure at each location will ensure you are able to reach every single employee in your organization.

Effectively, every employee should:

- Have had a volunteer reach out to them directly to discuss the campaign;
- Have been asked to make a donation;
- Be aware of the campaign and related activities.

While the Ambassadors will primarily be responsible for this outreach, every volunteer can play a role in raising awareness about the campaign. While engaging with your colleagues, take the opportunity to ask them if they’ve heard about the GCWCC and if you can answer any questions. Each volunteer should be championing the campaign in their day-to-day workplace interactions.

NOTE: *Each volunteer is responsible for adhering to the campaign parameters.*



Regardless of your volunteer role, there are several tools and resources available to you:

- **YOUR GCWCC LOCAL MANAGER:** These are professional fundraisers with resources and expertise to help you succeed in the campaign. They offer tailored recommendations and solutions, share best practices, behavioural science techniques, and are your liaison to highlight local community issues. They are your greatest ally and asset in this campaign; use them every step of the way to develop and execute a successful campaign.
- **WWW.GCWCC.ORG:** This is a website dedicated to supporting GCWCC volunteers. It has resources such as reference materials, communications tools, training materials and more.
- **GCWCC NATIONAL OFFICE:** This team is responsible for the operational management of the campaign from a national perspective. They are here to answer your questions, provide feedback, insight and expertise and resolve any issues you may have. They are the primary liaison for volunteers, donor inquiries and the retiree campaign.
- **WWW.CANADA.CA/CHARITABLE-CAMPAIGN:** This is the public-facing website for federal employees and potential donors. It includes general information about the GCWCC, as well as frequently asked questions, information about national events and a link to the donation portal.
- **GCWCC CHAIR'S OFFICE:** This team is responsible for supporting the Chair throughout the campaign. They can answer questions and provide support related to the annual vision, objectives or themes, GCWCC social media or national events. They are also the primary liaison for senior officials and professional development networks.

Champion

The Champion sets the tone for a successful campaign.

THEIR MAIN RESPONSIBILITIES ARE TO:

- **Provide vision and direction.** When leadership articulates a clear and compelling vision, it helps rally support and mobilize resources toward the fundraising campaign. Champions communicate the initiative's purpose, goals, and potential impact, inspiring others to get involved and contribute.
- **Select the Campaign Leader(s) for their federal organization.** NOTE: Occasionally, the head of your organization may identify the Campaign Leader themselves. We recommend, if possible, having a Campaign Leader for each region your organization has a presence in.
- **In engaging with the senior management team, ensure the campaign has access to the human, financial and communications resources required to run the campaign.** This may include collaboration with the internal human resources or financial teams, or assigning additional volunteers in these key sections of your organization.
- **Have a clear and visible presence through the campaign as a spokesperson and advocate for the GCWCC.** Share why you support the GCWCC and the Named Recipients. This helps people feel connected to the campaign and inspired to participate.

- **Effective Champions leverage networks and relationships. Champions (and Leaders) use their influence, connections, and platforms to expand the reach of the fundraising campaign, tapping into diverse networks and engaging stakeholders at all levels.** They cultivate partnerships, forge alliances, and leverage resources to maximize impact and reach fundraising targets.
- **Engage senior leadership as advocates committed to the success of the campaign.** Seeing support from your organization's executive is vital in rallying support and fueling passion for your campaign.
- **Provide guidance and support throughout the campaign journey.** From planning and strategizing to execution and evaluation, leaders advise, support, and encourage the fundraising team. They offer mentorship, remove obstacles, and celebrate milestones, strengthening morale and momentum.
- **Take every opportunity, both in public forums and in one-on-one interactions, to sincerely thank those who have supported the campaign, both donors and your volunteer team!**
- **Foster a culture of engagement and accountability.** By championing transparency, communication, and accountability throughout the process, leaders create an environment where everyone feels valued and empowered to contribute. They encourage open dialogue, listen to feedback, and address concerns, building stakeholder trust and confidence.
- **Set the example: Show leadership by making the first donation through the campaign!** When leaders actively participate in fundraising efforts through financial contributions, volunteerism, or personal involvement, it sends a powerful message of commitment and dedication. Leading by example motivates others and demonstrates solidarity with the cause.

Campaign Leader

The Campaign Leader oversee the operational aspects of the campaign and inspires their teams. They recruit and oversee the volunteer team and are the decision-makers responsible for the planning and execution of the campaign in their federal organization.

THE MAIN RESPONSIBILITIES OF THE CAMPAIGN LEADER ARE TO:

- **Build the campaign team. Here are a few tips to keep in mind:**
 - o Focus on recruiting ambassadors first and foremost; they are critical to your campaign as they will be representative of your workplace community and will be the ones to quickly disseminate information about the campaign and canvass each colleague. Keep in mind that many hands make light work; we recommend having one Ambassador for every 10 to 15 employees.
 - o Peer-to-peer recruitment works best.
 - o Involve co-workers who are well respected within your organization and who respect their peers, too.
 - o Engage volunteers – if a person is already volunteering in their community, chances are they will be an amazing GCWCC volunteer.
 - o Set your team up for success by providing access to good training and setting realistic expectations.
 - o When building your team, build enthusiasm and excitement, too!

- **Gather key resources** that will be required to execute the campaign in your federal organization.
- **Facilitate knowledge transfer:** we recommend having a Co-Campaign Leader to shadow you who will assume the role in the coming year. They act for a one- to two-year mandate and will:
 - o Fill in during the Campaign Leader's absence.
 - o Attend committee meetings.
 - o Take on key assignments as a key committee member.
 - o Gather information to help them in the future.
- **Objectively analyze the previous campaign** to create the timeline and goals, in collaboration with your GCWCC Local Manager.
- **Set campaign dates, timelines and objectives**, including clear and objective key performance indicators.
- **Develop a campaign plan** that includes engagement strategies with your GCWCC Local Manager.
- **Lead awareness and fundraising.**
- **Manage and coordinate** your team accordingly.
- **Obtain support** from senior management and other key players.
- **Share why you support the GCWCC and the Named Recipients.** This helps people feel connected to the campaign and inspired to participate.
- **Monitor campaign progress** with your GCWCC Local Manager and adjust strategies as needed.
- **Report on results at the end of the campaign**, conduct a post-mortem analysis, and provide recommendations for next year.

Ultimately, the Campaign Leader has their finger on the pulse of the campaign and ensures it runs smoothly from beginning to end.

If you are a larger organization with several regions or offices, it is recommended that you have a Campaign Leader at each of your primary regions/offices. Each of these Campaign Leaders will be responsible for executing the campaign in their respective region and will report to the principal Campaign Leader.

THESE REGIONAL CAMPAIGN LEADERS WILL:

- **Ensure there are ample Ambassadors in their region/office** and ensure they are adequately prepared to canvass.
- **Lead awareness and fundraising regionally.**
- **Reach out to their Local Manager** for local support, including providing campaign recommendations, local speakers, testimonials and event support.
- **Tailor the organizational campaign strategy** to meet the needs of their region/office.
- **Monitor campaign progress** with your GCWCC Local Manager and adjust strategies as needed.
- **Optional:** host local events tailored to the region's unique environment.

Overall, the regional Campaign Leader should work closely with the principal Campaign Leader to make sure that their local efforts align with overall national efforts. To support this, the principal Campaign Leader should be in touch regularly with their regional counterparts.

Treasurer

The Treasurer acts as the Chief Financial Officer for their federal organization's campaign. They provide support to Leaders regarding financial planning and progress, provide administrative and financial oversight, track campaign results and prepare financial reports, as well as ensure all financial regulations and processes are followed.

NOTE: *There are varying types of Treasurers in the GCWCC. The section below only applies to departmental core Treasurers and/or their Co-Treasurer. In some instances, depending on the ePledge structure, one additional Treasurer per region will have access. However, the structure must be set up appropriately before the active campaign period.*

Treasurers are required to attend a live training session before gaining access to the reporting system and are responsible for ensuring that all financial and administrative rules, regulations and processes regarding the collection of donations and organization of events/activities are known and respected by the team.

A separate series of documents is available to the Treasurer following completion of the virtual training session; as this may include sensitive information, it is not broadly distributed.



Ambassadors

Ambassadors educate and canvass colleagues. They are the frontline and face of the campaign. Through interactions with colleagues, they are there to raise awareness about the impact of donations and to ask for pledges.

AMBASSADOR LEAD

Depending on the size of your organization, you may choose to have an Ambassador Lead. This person supports the volunteer team of Ambassadors by providing guidance, support, access to training, and structure for employee canvassing. This person arranges training and townhalls for Ambassadors with their Local Manager or the National Office and is the Ambassador's main point of contact. NOTE: They must work closely with the GCWCC Local Manager to ensure any organizational training is accurate and consistent with national training. It is essential that they work closely with the GCWCC Local Manager to ensure any organizational training is accurate and consistent with national training.

AMBASSADOR(S)

An integral part of any campaign, Ambassadors fuel passion and inspire colleagues. They are interacting with every single employee to raise awareness, ask for donations, answer questions and dispel myths. They are here to promote the campaign and act as influencers by having direct, sincere conversations with their peers about the GCWCC.

THE MAIN RESPONSIBILITIES OF THE AMBASSADOR ARE TO:

- **Work with your federal organization's campaign team** to ensure a cohesive and efficient campaign.
- **Promote and raise awareness** about the campaign and the Named Recipients.
- **Ask their colleagues to donate** the GCWCC.
- **Be the source of knowledge and information** in every aspect of the campaign.
- **Engage with their colleagues** in group and one-on-one settings.
- **Educate their colleagues on:**
 - o What the GCWCC is and how it positively impacts Canadians in every community.
 - o The impact of donations through the Named Recipients.
 - o The different options for giving through the GCWCC.
 - o How to use ePledge.
- **Provide support** to those who wish to donate.
- **Follow up with each employee** to ensure those who wished to donate were able to do so.

- **Share why you support the GCWCC.** This helps people feel connected to the campaign and inspired to participate.
- **Sincerely and warmly, thanks to each colleague** for their time, whether they've chosen to donate or not.
- **Become familiar** with the tools and lead by example: make your donation via ePledge.



Your Ambassadors need to believe in the campaign and be willing to connect with colleagues to make a fundraising ask.



It is also critical that they understand the campaign, the role of the Named Recipients and have access to up-to-date information. At the end of the day, the Ambassador's sole job is to discuss the campaign with their colleagues. Discussing means not only speaking about the campaign, but listening to your colleagues. Reassure them, address any concerns, listen to what's important to them and show how donating through the campaign supports their charitable priorities.

Do not dilute this with other tasks, as this will negatively impact your results – if you have other tasks that need to be accomplished, assign a specific individual accordingly.

Ambassadors should read the [CANVASSING SECTION](#) of this guide to fully prepare for their role.

Event Coordinator

The Event Coordinator is responsible for coordinating the events and activities that are held to supplement and celebrate your fundraising efforts, success, and goals. There is a [step-by-step Campaign Event Guide](#) the coordinator should read and review.

IN SUMMARY, THOUGH, THE MAIN RESPONSIBILITIES OF THE EVENT COORDINATOR ARE:

- **To connect with your GCWCC Local Manager** to learn about the platforms available and provincial guidelines you may be required to follow. They will also be able to offer guidance on best practices for events.
- **Ensure all events are focused on either impact or fundraising.**
- **Ensure the programming meets all federal and GCWCC requirements** ([see Campaign Parameters](#)).
- **Create a project timeline** for your event(s).
- **Set key performance indicators (KPIs)** for your event(s).
- **Create a budget** (when there are costs associated with the event).
- **Work with your federal organization's campaign team** to promote the event.
- During the event, **educate participants about the Named Recipients, the value of the GCWCC and share stories about why employees give.** Make sure to ask for a pledge, but also have fun!
- After the event, **collect feedback**, host a post-mortem to review KPIs, the budget and all feedback gathered. Use this meeting to provide recommendations for future events.

Event Coordinators should also read the [EVENTS SECTION](#) of this guide.



Communication Officer

The Communications Officer is an optional role but will be able to support the efficient diffusion of communications in your federal organization.

COMMUNICATIONS OFFICER ARE TO:

- **Develop a communications timeline** that supports the overall timeline and includes sufficient time for approvals, vetting, translation, etc.
- **Review all communication content** before it is distributed to ensure it adheres to your organization's communications policies and strategies.
- **Ensure all communications adheres to overall campaign parameters.**
- **Provide recommendations on effective communications channels** in your federal organization.
- **Do what they can to support last-minute turnaround or campaign pivots** from a communications perspective.

The Communications Officer has expertise in communications and public relations, and is responsible for raising awareness, sharing stories, advertising public events and for raising the campaign's visibility using internal communication tools (newsletter, intranet and other tools), videos, online posters, social media content, and more.

NOTE: *National content will be provided to support awareness during the campaign.*

Communications Officers should read the COMMUNICATIONS SECTION of this guide to fully prepare for their role.



BEST PRACTICES

The GCWCC has been tailored to reflect the public service while also implementing proven campaign best practices, as outlined below. By following these best practices, you can ensure a successful campaign. If not all elements apply to you or you would like to consider tailoring components to meet the needs of your federal organization, it is important to:

1. **Ensure your changes remain compliant** with campaign parameters.
2. **Consult with you GCWCC Local Manager** to ensure the changes will not hinder campaign performance.

At its most basic level, there are three key steps that your campaign should follow, in the order listed below. These should be implemented at the macro level (overall for your entire campaign) as well as at the micro level (in each interaction, event, activity, etc.) Even if you are adjusting your campaign, be sure that any changes still reflect these three steps to ensure success:

1. **Educate:** Teach people about the GCWCC and the Named Recipients, including their respective value propositions. Showcase impact by telling stories and hosting guest speakers. Finally, take the time to answer any questions people may have about the campaign, the Named Recipients or how to make a donation. By the end of this step, employees should have a good understanding of what the GCWCC and the value of the Named Recipients.
2. **Donate:** Make a clear direct ask for a pledge or donation to the campaign. Do not use pressure tactics or insinuate it is mandatory. However, it is important to give every potential donor the chance to make a decision. A direct ask ensures they have that chance. Do not leave it to subjective, informal and indirect interactions because many will miss the opportunity. The number one reason people don't give is because they aren't asked.
3. **Celebrate!** Show your appreciation and celebrate your successes. This is a great place to engage your employees in fun activities and events, once everyone has been asked to make a donation – celebrate your communal “win” for the community. Acknowledge the milestones that have been achieved and thank everyone for their hard work and contributions.

Beyond this overarching principle, there are 10 operational steps to a successful campaign described below. These steps, as well as the “Educate-Donate-Celebrate” notion will help foster effective donor stewardship, creating a sustainable donor relationship rather than collecting a transactional donation.

Keys to a successful campaign

1. Build a strong team

A strong team is the foundation of a strong campaign. This means choosing the right people to volunteer for the campaign. The best volunteers are going to be those who are passionate about the GCWCC and the Named Recipients.



OTHER CRITERIA TO CONSIDER WHEN BUILDING YOUR TEAM INCLUDES:

- Recruit people who are committed to the philosophy and goals of the GCWCC.
- Ensure representation from every sector of your federal organization.
- Those who volunteer in their communities: let them know they can extend their volunteering to the workplace.
- Those who have participated in previous campaigns. They are knowledgeable and already equipped to support the campaign with little to no learning curve ahead of them.
- Those who are dedicated and hard workers. These are the people who you can give a task to and be confident that it will be completed.
- Those who have a positive reputation and influence in the workplace.
- Those who may be looking to make a difference in their communities.
- Those who are looking to develop their professional skills.
- Those who have the skillset you need. For example: engage someone in your organization's communications team to support the development of messages. Or consider a tech-savvy individual to build a social media presence.

WHEN SEEKING OUT POTENTIAL VOLUNTEERS:

- **Identify and approach** previous campaign volunteers.
- **Encourage people** to volunteer for a two-year term to ensure a transfer of knowledge for consecutive years.
- **Ask your committee members** if they are willing to start the campaign by making their donations first. Remember, no donation is too small. This will also expose them to the donation experience, and, since they'll have gone through the process, will make them more comfortable explaining how to donate and give them the opportunity to also say they donated, which adds credibility to their ask.

Be sure to let potential volunteers know what they can gain from participating. It is valuable work experience where they can develop new skills and network with their colleagues. It will also allow them to make a meaningful difference in their communities.

It may be hard to find enthusiastic volunteers. Whoever you have join your team, do your best to create a positive experience for them so that they will want to return as an enthusiastic volunteer next year. Also, be sure to pay attention to your current volunteers who may be good candidates for other roles such as Campaign Leader in the future, so you can start supporting and coaching them towards that path if they are interested. The ideal volunteer structure is outlined below.

A STRONG TEAM WILL BE TAILORED TO YOUR ORGANIZATION BUT SHOULD AT LEAST INCLUDE:

- **One Champion**
- **A principal Campaign Leader**, with other Campaign Leaders in each region or main office your federal organization has depending on the size of your organization.
- **One treasurer** (or multiple if you are a large organization spread across Canada – consult with United Way East Ontario when setting up ePledge for recommendations. Note: treasurer assignments and structure should be set up as desired at the beginning of the campaign for reporting purposes).
- **One ambassador** for every 10 employees. If this ratio is unachievable, try to get as close as possible. Direct contact and engagement is best, which is why this is the ideal ratio. Ambassadors should be present in every office/region.



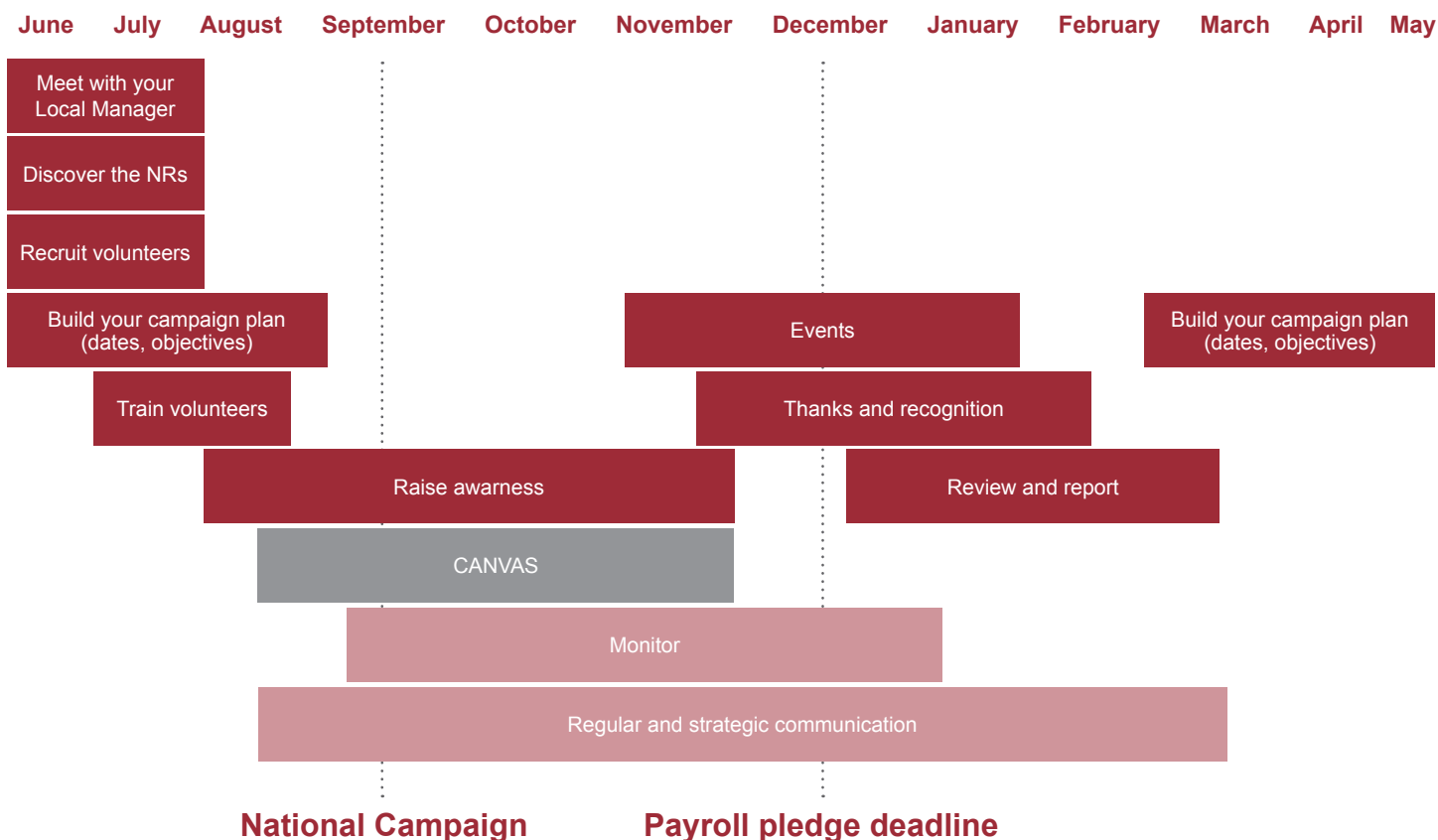
2. Plan your campaign

“BY FAILING TO PREPARE, YOU ARE PREPARING TO FAIL.” – Benjamin Franklin

A well-planned campaign will lead to a well-executed campaign. Depending on the size of your organization and the resources available, your timeline for planning may look different. Below is a timeline of events that is used at the national level for you to consider using as well. It is a full year cycle – if that is longer than you have the capacity for, you can compress and adjust as necessary. It is recommended that you maintain the order of activities and consult with your Local Manager when adjusting.



As you plan, keep in mind that the whole campaign and every element should first educate and raise awareness (Educate), then have a clear ask for a donation/pledge (Donate), and finally focus on showing appreciation and celebrating (Celebrate). As a ground rule, each part of your campaign should have each of these elements in this order.



Build your campaign plan

One way to guarantee a successful campaign is to schedule a strategic planning session. This two- to three-hour session should include the Campaign Leader, key committee members and the GCWCC Local Manager. The GCWCC Local Manager will be able to lead this session, should you choose. If you are holding a regional campaign which includes more than one GCWCC Local Manager, we recommend you invite them all to join.

THE SESSION WILL HELP YOU:

- **Develop a thorough understanding of your campaign's history and past trends**, as well as the campaign overall.
- **Focus on your campaign's areas** of greatest potential.
- **Identify campaign strengths** so they can be protected and expanded.
- **Develop strategies and a workplan** to increase the number and level of employee donations.

- **Identify new opportunities** and measures to replace or adapt traditional fundraising events.
- **Outline new ways** of executing your campaign.
- **Enhance your campaign committee's capacity** to work as a coordinated team.
- **BONUS: develop professional skills**, including analytical skills, that can be applied in the workplace.

The strategic planning session provides a “snapshot” of your campaign. It is an opportunity to look for potential improvements or adjustments that can be made to help you succeed.

THIS SESSION SHOULD INCLUDE THE KEY ELEMENTS BELOW:

A. ANALYZE DATA

The first step to a successful campaign is to analyze the previous campaign results. Ideally, the previous campaign team would have measured some key performance indicators such as pledge rate, amount raised, and employee engagement. These will be useful tools to determine what changes should be made to the campaign in the coming year depending on the level of success of each indicator. If no indicators were measured, review your campaign's overall performance over a three-year period to get a good sense of where to focus your attention this year. Your treasurer or GCWCC Local Manager will be able to pull the reports for you.

While analyzing previous results with your GCWCC Local Manager, consider what worked well and what didn't. If something wasn't as successful as anticipated, what can be changed to improve results? Or should the element be removed? If something worked well, how can it be amplified or improved? Consider what metrics were useful to overall campaign success that you would like to again measure this year and what success would be. Your Local Manager will be able to provide recommendations supported by historical campaign data within your federal organization and across the entire GCWCC.

B. CREATE OBJECTIVES AND GOALS

Using the data from the previous campaign and recommendations from your GCWCC Local Manager, create objectives and goals for the current campaign year. Goal setting should be SMART: Specific, Measurable, Achievable, Realistic and Timely. It is recommended to have at least two fundraising goals and one engagement goal. Some fundraising goal examples are:

- **Raise 10% more than last year.** Note: the general rule for revenue targets is to raise last year's total + the current year's inflation rate. For example, if you raised \$20,000 last year and inflation is indexed at 3%, you would set a target of \$20,600 for this year ($\$20,000 \times 1.03$).
- **Acquire 100 new donors.**
- **Increase pledge rate** (number of donors divided by the number of employees) by 3%.

SOME ENGAGEMENT GOAL EXAMPLES ARE:

- **Ensure employees are 100% canvassed by the payroll pledge deadline** (each employee has been directly asked to make a donation through the GCWCC).
- **Ensure each employee has participated in at least one event** or activity during the active campaign.
- **Email open rate is 50%**, or email click rate is 30%.
- **Convert 30 special events contributors** into payroll deductions donors, at an average of \$5 per pay.

c. Review reporting structure early

While planning, consider what you would like your reporting structure to be. This is how your results will appear in reports and how your volunteer base is structured (including which volunteers get access to reports). Please review this early and give careful thought to it. It is difficult to make changes once the campaign is underway. If you are unsure what structure is best for you, contact ePledge admin support to explain what you hope to achieve and they will be able to provide suggestions. For example, if you want to be able see reports for each of your six regions, they will be able to provide recommendations based on what's possible in ePledge and set up accordingly.

d. Consider key national dates

Be sure to also consider key national dates in your planning. This is to ensure you don't overlap with competing events, that you can amplify other national events and include it in and around your planning, and that you don't miss any essential dates that may impact your campaign. For example: the payroll pledge deadline is the last date anyone can make a pledge to the campaign via payroll. It is a leading method chosen among donors. You do not want to plan education and pledge requests after this date as any revenue received is historically nominal in comparison. However, you may want to amplify your communications leading up to this event as a final sprint to the deadline.

e. Review your campaign material

While the national team will provide several communications assets for you to use throughout your campaign, if you have any you design specifically for your federal organization, now is the time to review it. Again, consider what worked (QR codes are a great way to measure how material resonates), and what can be improved. Create a production management schedule that lists all the assets you hope to create, what format they will be in, who will lead the creation and execution, and what the workback schedule is to ensure sufficient time for relevant approvals. Supporting that, you can create a content calendar that details how and when different assets will be used, including on what platforms and any taglines, hashtags or captions you intend to use. This will ensure everything related to communications is turnkey during your campaign, leaving you with one less thing to worry about!

Meet with your Local Manager

Meet with your Local Manager early and often. They are your free local fundraising expert and will be able to support you with advice, resources and solutions. By meeting with them early, you'll be able to establish a relationship, review your results and plan the campaign easily. They will be a source to answer all your questions, support logistics, and provide guidance.

Discover the Named Recipients

Learn about the Named Recipients, HealthPartners and United Way Centraide, including what they do and how they do it. There are several resources available at www.gcwcc.org to learn more about both. You should feel comfortable advocating for and championing the Named Recipients and if you have questions or require more information, your Local Manager is there to help.

Recruit Volunteers

Volunteers need to be available, trained, informed and given access to relevant tools and platforms as early as possible. Furthermore, planning can only go so far before you need to lean into your volunteers to operationalize different aspects of the campaign. Therefore, we encourage seeking out campaign volunteers as early as possible so they are best equipped to support you and be the strong team you need.

Train Volunteers

All volunteers are expected to participate in GCWCC training. Depending on their role, there are different options available. Visit gcwcc.org for more information about the roles and training available. Campaign Leaders, Treasurers and Ambassadors have both asynchronous online training and live virtual sessions to attend. Even returning volunteers should review the material and participate in the virtual sessions so they are informed of any updates and changes. There is asynchronous online training available for all other volunteer roles as well. You may also want to consider providing specific training around your federal organization's objectives, plans, goals, etc. on top of the national training provided.

Raise Awareness (Educate)

The active part of your campaign should be focused on the “Educate – donate – celebrate” steps. The first step, to educate, is where you raise awareness about the campaign and the Named Recipients.

Canvas (Donate)

Best practices have shown that events and activities should be held after canvassing in order to avoid both donor fatigue and the “checkbox mentality” (I can check donating off my list because I’ve bought a muffin at the bake sale). It is strongly recommended to have an event blackout period early in the campaign where you focus solely on canvassing. The only event that may take place is a launch or kickoff event.

Give everyone the opportunity to make an informed decision about whether to donate to United Way Centraide, HealthPartners or any other registered Canadian charity through the GCWCC. The most common reason individuals do not give is, quite simply, that they were never asked.

Events (Celebrate)

Arguably one of the highlights of the campaign is to spend time with your colleagues doing activities or participating in events. There are no shortage of activities or ideas (please see the full [event guide](#) for more information) but it is important to be strategic about how many events you have and when you have them. It is encouraged to have a launch event at the beginning of your campaign where you focus on raising awareness and building excitement. Then, near the middle or end of your active campaign, consider what other activities you may want to have to maintain momentum and/or show your appreciation for everyone's hard work.

Thanks and Recognition

Showing appreciation and giving thanks is a great way to build and maintain relationships with your colleagues, volunteers and donors. A simple “thank you” goes a long way, but it is also encouraged to be intentional and focused, integrating all the different languages of appreciation: Words of Affirmation (say ‘thank you’), Quality Time (go for a walk with someone), Acts of Service (help carrying bags to the event), Tangible Gifts (a gift card to Tim Hortons) and Physical Touch (an appreciative handshake).



Please ensure you remain compliant with all office policies when considering the different languages of appreciation. Know there are a lot of different ways to show your gratitude meaningfully, so people feel appreciated and therefore want to continue to support the campaign.

Review and Report

Using the key performance indicators you created in your planning period, review them against your results to determine what worked well and what are potential areas of improvement.

Paired with that, using the information you've collected throughout the entire campaign as part of your monitoring exercise (see below), as well as any surveys, anecdotal feedback, debrief meetings or focus groups you've had, prepare a campaign review report with your GCWCC Local Manager. This report should be presented to key campaign volunteers and stakeholders and become the foundation of campaign planning the following year.

It is important to objectively look at the data, looking for majority rather than consensus and making recommendations to support the success of the majority of key performance indicators.

Duration: Monitor

Throughout the campaign you are going to monitor all aspects: how are communications materials resonating? How are the financial results comparing to last year? What is the feedback we are receiving from our colleagues? Track this information as it will help you build a stronger campaign the following year. Have regular meetings with your volunteers so they can report on the challenges and opportunities they are facing. As well, be ready to pivot or adjust your strategies if you are not on track to hit your targets. Your GCWCC Local Manager will be able to recommend easy-to-implement strategies.

But don't just consider informal monitoring of feedback and results, consider preparing a survey for your peers ideally using the same questions year over year to allow you to benchmark the data. It is also recommended to have a debrief meeting with your key volunteers and/or senior executive, collecting their feedback, focused on solutions and recommendations.

Duration: Regular and strategic communications

This step is all about using the production management schedule and the content calendar you created in the planning stage to ensure you have regular communications that have been well-thought out to support the campaign's key performance indicators. Striking a balance between enough communication and ensuring people pay attention can be tricky, but you GCWCC Local Manager can provide guidance. As well, please review the [Communications section](#) below for more details and solutions.

3. Engage different stakeholders

By focusing on different audiences and groups of people within your workplace, you will be able to engage in a way that resonates with them, leading to better results.

While we have limited demographic data on public service employees, there are still a few groups that may be considered (using publicly available data) and targeted accordingly, leading to more impactful engagement.

Federal Professional Networks

Across the federal network, and likely within your organization, there are several different Federal Professional Networks representing specific audiences. For example, the Black Employees Network, Young Employees Network, or Indigenous Employees Network, to name a few. These networks have a great sense of what is important to their community within the federal public service and can offer valuable insight.

CONSIDER REQUESTING TWO MEETINGS WITH THEM:

1. An introduction and information gathering session: Introduce them to the GCWCC but take time to listen and ask questions about charitable causes that are important to them. Ideally, you will be prepared to discuss how one or both Named Recipients support these causes to help build awareness, but if not you can listen and let them know you'll follow up with more information. You can also discuss your plans for the campaign and ask for advice on how it can better resonate within their network. For example, including a smudging ceremony or using more inclusive language.

2. An impact session: Work with your GCWCC Local Manager to find representatives of each Named Recipient who can speak to these networks about the causes that are or may be important to them. While tailored testimonials can be hard to find sometimes, your GCWCC Local Manager will do their best to tailor to these networks as a targeted impact strategy. If they cannot get testimonials, they likely will be able to support you with Named Recipient staff speakers discussing how each Named Recipient supports those networks and communities specifically. This will create a direct link to the work they do and the priorities of the networks which will in turn foster better donor engagement.

Senior management

Senior management support is important because it gives credibility to the campaign and has a positive influence and impact on public service employees. Furthermore, their support ensures you can tap into key resources as needed.

THE VALUE PROPOSITION OF THE GCWCC FOR SENIOR MANAGEMENT IS:

- It brings teams together around common values and creates an enriching, unifying experience.
- It allows you to interact and meet employees in an informal setting, building a stronger professional relationship through a shared commitment to support the communities you live in.

THE CAMPAIGN IS AN OPPORTUNITY FOR SENIOR MANAGEMENT TO:

- **Establish community mindfulness and support as a priority** for the organization that aligns with the organizations values.
- **Champion the campaign** by circulating information and having conversations with other senior executives and managers to earn their support.



- **Support volunteers** by allocating sufficient resources so they can fulfill their role and give them the opportunity to speak at existing meetings, etc. about the GCWCC.
- **Show genuine appreciation** for contribution of their volunteers.
- **Share their own reason for giving** through the GCWCC to amplify impact and strengthen relatability – inspiring others to give as well!

Leader donors

A Leader donor is someone who pledges \$1,000 or more through the GCWCC. While only around 30% of donors in the GCWCC are considered “Leaders,” they represent close to 80% of all campaign pledges. Leaders make a significant impact on the campaign and should be engaged and stewarded accordingly. At the same time, tapping into potential/new Leader donors requires a targeted strategy. When considering how to engage Leader donors, we know that many are likely to be in the higher ranks of the public service. We also know that the majority of senior federal public service employees are from GenX.

While these two pieces of information are somewhat generic, they provide more than enough information to support a certain level of tailoring, such as:

- **Unique messaging**, such as emphasizing “you are a leader in the workplace, consider being a leader in your community as well and make a pledge through the GCWCC today.”
- **Use communications tools that resonate with GenX:** direct, concise and clear messaging with a more formal tone. Phone calls, in-person interactions and emails are all channels they comfortably engage with. However, they are less likely to engage in instant chats or on social media, particularly from a professional perspective.
- **Encourage** those who may or may not be a Leader donor to increase their giving in line with inflation and/or the rising needs of Canadians.
- **Consider tailored appreciation:** formal thank you notes or phone calls or an opportunity to attend a Leader-centric event are all possibilities, as long as they follow the campaign parameters.
- **Provide optional promotional tools** to them such as an email signature badge as a Leader donor through the GCWCC.
- **Gen X is driven to donate out of a sense of duty**, as well as for the ability to receive tax credits. Integrate these elements in your messaging to better resonate with this demographic.
- **Ask senior management to engage** with their peers in one-on-one conversations about the GCWCC.
- **Work closely with your GCWCC Local Manager** on other Leader donor strategies that can be tailored to your federal organization.
- **BONUS:** If resources allow, identify a volunteer lead to focus on leadership giving. They can focus on implementing the strategies above.

Known demographics

You may have a demographic survey of your federal organization, or you can find disaggregated data from the Treasury Board Secretariat's (TBS) website. Use this to determine what your employee demographic looks like. For example, according to 2023 TBS data, the majority of the federal public service are Millennials, followed by GenX.

With this information, you can ensure you use fundraising language, messaging and assets that resonate with these groups. Your GCWCC Local Manager will be able to provide great fundraising tips for different audiences such as Millennials.

Unions

Union support can be helpful as they are a leading influencer in the federal public service. Consider having a union representative on your campaign team or ask your local union President draft a letter of support. Engage your union representatives in events and activities and/or ask them to share their own reasons for giving through the GCWCC.

4. Canvassing

While your Ambassadors will lead the canvassing efforts, every volunteer can support the campaign by having conversations with their peers, which is essentially what you are doing when you are canvassing. 80% of the funds raised in the GCWCC come from direct donations through canvassing, which means this step is absolutely the most essential part of the campaign.

In order to effectively canvass, you must prepare yourself, have the conversation and follow up afterwards. And remember: technology makes giving easier but does not replace conversations with your peers and actually asking for a contribution.

OVERALL, HERE ARE A FEW THINGS TO CONSIDER:

- **Align your canvassing strategy** with the overall rollout plan in your organization so you can complement rather than contradict the efforts. Is there a sprint week? Key deadlines or cutoff dates? Key events?
- **Think of yourself as the “matchmaker”** between donor interests and community needs. Ask people to think about what community or health supports are important to them and then let them know how the Named Recipients support those causes, so they can be confident a gift through the GCWCC will support the causes they care about. For example: if they expressed an interest in aging parents, talk about how United Way and HealthPartners support aging seniors and/or Alzheimer's through their programs.
- **Share why you participate:** your story or reason to give. This is an effective way of showcasing direct impact.
- **Do not assume people know about the campaign,** ask if they need anything explained and take a few minutes to walk them through what you may consider “the basics.” Also, be sure to start from a neutral position of trust and relationship building.
- **A person will not give if you don't ask them.**



- **Your goal should be to have 100% of your employee population canvassed.** This can be supported by working with your campaign team to create a list of people to canvass and dividing it among the canvassers. When doing so, consider:
 - o Whether you will use an affinity list (ambassadors will be more comfortable canvassing people they know) or random assignments to promote networking and better understanding of the workplace.
 - o Updating ambassador lists to reflect those who may be uncomfortable canvassing certain colleagues due to personal reasons.
 - o Remember to develop strategies to target part-time employees, those on leave, travel status, etc., and contract employees (temporary, student, etc.). Let each know of the various donation methods they can use (payroll, monthly credit card, or one time donations via credit card or PayPal).
 - o If someone is expecting a change in employment status such as changing departments or retiring, they can:
 - If keeping the same PRI and still paid via Phoenix, continue giving via payroll.
 - If retiring, they will receive an enrollment letter from the GCWCC in September inviting them to continue to donate through pension deductions. In the interim, consider making a monthly credit card pledge or one-time gift via credit card or PayPal.
 - If unsure, make a monthly credit card pledge, or a one time credit card/PayPal gift.
- **Be sure to follow up with your list and ensure you engage** with those you missed the first time around. Follow up with your team as well to inform them of your progress and discuss any canvassing strategy adaptations that may be needed.
- **You are not alone:** ask for help and use the resources available to you.

Prepare yourself

Learn about the Named Recipients, HealthPartners and United Way Centraide. Understand their role in the campaign and how they help Canadians so you can help advocate on behalf of them. Learn about how they support different stakeholders and how they determine the needs of their communities.

As well, it is important to understand the parameters around the campaign so you remain compliant. For example, you cannot promote other registered charities.

Learn also about your own federal organization's campaign: what are the important dates, key messages, planned activities. Be prepared to answer questions people may have about these.

Please ensure you are also versed in the various ways to make a donation. All individuals should be encouraged to use the online platform, ePledge, however paper pledge forms are available in specific circumstances (If you require a paper pledge form, please speak with your GCWCC Local Manager).

The best way to familiarize yourself with the ways to donate is to go through the steps yourself when you make your own donation. If you have any questions, contact your volunteer team for support.

Ideally, your office will provide you with a list of contacts you are expected to reach out to. As much as possible, try to plan/schedule individual meetings with these people so you can have a purposeful conversation where you can answer their questions.

Have the conversation

When you are speaking with a colleague, ideally it is in a one-on-one situation so that you can have more of a dialogue and they will feel comfortable asking any questions they may have. If not an individual conversation, consider (in this order): a phone call, a group chat/meeting, an individual email, or a group email. You are also encouraged to take additional opportunities to speak about the GCWCC: at staff meetings, townhalls, in smaller team meetings, etc.

WHETHER INDIVIDUAL OR GROUP CONVERSATIONS, HERE ARE SOME TIPS TO KEEP IN MIND:

Educate

- **Let them know about the GCWCC as well as the Named Recipients.** Share at least one program or service that each Named Recipient offers – bonus points if you think it may align with their own interests.
- **Share what motivates you to contribute to the campaign,** why you yourself choose to give.
- **Spend as much time listening as you do talking.** Ask them if they have any questions or concerns. Ask them their thoughts on the campaign as that may prompt the opportunity to address some common misconceptions. You can also ask them if they have any causes important to them, or what their life looks like now. This can be very telling and allow you to offer more specific programs and service that the Named Recipients offer. If you are not sure of specific programs, let them know you can find out more information and get back to them.
- **Integrate the national key messages** as well as any key messages your own federal organization may have drafted into any scripts you may prepare for the conversation.
- **Do not ever guess if you don't know the answer,** instead let them know you will get back to them, which is a great way to activate the third key element of canvassing: following up.

Donate

- **The most important step is to directly ask if they would like to make a donation through the GCWCC today.** Encourage all amounts of donations: any amount can make a difference.
- **If you can integrate a reason why in your ask, this will increase your chances of success.**
- **Showcase impact every chance you get.** Please review the [Impact and Behavioural Science](#) section for ideas on how to do that.
- **Show respect:** show understanding and be tactful when someone makes an objection. Seek to understand, some people need more time. Make them aware of what GCWCC does, little, by little. If they don't give this year, they may give next year. It's an investment into a relationship.
- **Do not pressure them,** if they are not comfortable making a decision or they say 'no,' respect this answer and thank them for their time.



Here is an example of a conversation you may have:

Canvasser: Hi [Name], thanks for taking the time to chat with me today. How are you doing?

[Name]: Not too bad thanks! Busy with work but I'm taking my family on vacation to Disney in two weeks, so I'm excited [Mental note: they may have young kids and causes about kids may resonate better with them]

Canvasser: That's exciting! [continue banter for a minute or two]. Listen, I wanted to take a few minutes to chat about the GCWCC, have you heard about it before?

[Name]: No, not really.

Canvasser: Ok, no problem. The GCWCC stands for the Government of Canada Workplace Charitable Campaign. I know, a mouthful, eh? It's a fundraising campaign run by public service employees in the fall to raise money for causes that are important to them. We have two Named Recipients: United Way Centraide and HealthPartners. They have complementary missions that support Canadians in every region. Together, they help build healthier people and stronger, more inclusive communities. [Insert one specific example for each NR]. Let me stop there for a second, do you have any questions or thoughts?

[Name]: Well, I give to my charities directly. Why would I do it through the GCWCC?

Canvasser: I would say there are two main reasons for that: 1) you can give to any registered Canadian charity through the GCWCC and it's designed to be streamlined and efficient, the charity doesn't have additional fundraising costs of a small, separate campaign. 2) You can consider giving a larger amount over a longer period of time and have it directly deducted from your payroll. This gives stability for the charity and ensures your charitable tax deduction is recorded on your T4. It makes everything so simple! Can I ask, what causes are important to you?

[Name]: Affordable housing is on my mind, I have friends who are on the verge of homelessness because of inflation and the cost even just to rent a place! It's ridiculous.

Canvasser: I'm so sorry to hear that, I have friends in the same boat and I feel that stress myself, too. What I've learned through the GCWCC is when we support the Named Recipients, they're helping to resolve the root causes as well as the immediate challenges and they do their homework to really understand what that is. For example, United Way has a robust strategy to address homelessness and the underlying causes. In 2024 alone, they put \$19.7 million into support for resources to improve access to safe and affordable housing.

[Name]: I didn't know that!

Canvasser: Yep, I can send you more information if you're interested?

[Name]: Sure.



Canvasser: Great! Any other questions or thoughts come to mind?

[Continue exchange, answering questions as best as you can, or commit to finding the answer, take the opportunity to also learn a little about them and start to build a professional relationship.]

Canvasser: So, would you like to make a donation through the GCWCC today to support United Way's work around affordable housing?

[Name]: Yes, tell me how!

[Walk them through ePledge or tell them you'll send a link within the next few hours]

[Name]: I'm not sure, I need to think about it.

Canvasser: That's absolutely fine, I get it, it's a lot of information! I'll follow up in a week to see if you have any other questions, but feel free to reach out to me any time.

Canvasser: Thank you so much for taking the time to chat today, I hope you have a great trip to Disney, make sure to try the elephant ears, I couldn't get enough of them when I was there!

Following the conversation, make sure to follow up with whatever you promised to provide/do/share in a timely fashion, depending on how the conversation ended.

For example:

- **They wish to donate:** Follow up with an email within a few hours sharing the details of how to donate.
- **They need more information you don't have the answer to:** Follow up with an email or conversation once you have the answer. Ideally within one week of your initial conversation. If you don't have an answer within a week, send a follow up note to let them know you're still working on it and will be in touch shortly.
- **They were unsure:** Follow up two days later with an email asking if they have any other questions, while also reminding them of the impact and including a link to donate.
- **They chose not to donate:** Follow up within two days saying thank you for taking the time and letting them know you're happy to chat or connect at any time, whether it be related to GCWCC or any other professional/personal tidbit that you may be able to help them with.
- **Other:** If you were left in a situation other than this, or you are unsure how the conversation landed, follow up two days later with an email asking if they have any other questions, while also reminding them of the impact and including a link to donate.
- **Be sure to follow up with your contacts on important deadlines as well. An email the week of the payroll pledge deadline to remind them it's their last chance to donate that way.**

If you are unable to connect with someone in person or through an online meeting, the next best option is to send an email. Templates will be provided annually to you, but you can also reach out to your Local Manager for help in customizing messaging. Review the Impact and Behavioural Science section below for more ideas as well. Ultimately, your email should also follow the "Educate-donate-celebrate" steps and there should be a follow-up plan.



Here is an example of a good email:

1. “Join Us in Making a Lasting Impact!” (recommended)
2. “Have You Considered This Meaningful Way to Give?”

Dear [NAME],

As we reflect on the incredible progress we’ve made together this year, I’m filled with gratitude for your unwavering commitment to the Government of Canada Workplace Charitable Campaign (GCWCC). Your support has enabled us to provide essential resources and services to those in need, and we couldn’t have done it without you!

But there’s still so much more to accomplish. Join your colleagues in helping us expand our impact by supporting the programs and services both United Way Centraide and HealthPartners offer. Your contribution can make a significant difference in the lives of countless individuals and families.

[Consider including a short, specific example for each Named Recipient, such as what X amount of dollars can do]

Today, I invite you to consider making a donation to support our ongoing efforts. Your gift no matter the size - will help us continue our vital work and ensure that we can meet the needs of our community. (You can donate here: [insert donation link].)

Thank you for being a part of our journey. Together, we can create lasting change and build a brighter future for those we serve. With warm regards,

[Your Name]

[Your Title]



Create an email schedule including when you are going to follow up on this message (ideally one week later) and what other messages you might send at key times that complement the campaign efforts of your organization.

As a reminder, while this is an opportunity to support the GCWCC, it is also an opportunity to network and build a professional relationship. If you were able to connect about other things in your conversation (ie: an upcoming trip to Disney, or their desire to connect with someone in your department), you are encouraged to follow up with them about these elements as well. After the Disney trip, ask them how it went and if they tried the elephant ears. If they were looking to connect with someone on your team, talk to that member to see if they'd be ok with it and then connect the two parties. Try to touch base regularly with this person throughout the year to continue to build and grow that relationship.

TIP: While networking is an excellent skill to develop, you can strengthen your networking skills by considering what you can offer to the person following your interaction. People will remember your kindness and you will stand out among all the networking interactions out there. For example, connect them with that colleague, or show them you were thinking about them by attending a meeting they are in charge of hosting and following up with a note afterwards sharing some words of encouragement or support.

As you are their most immediate contact for the GCWCC, you will hopefully become a resource for them to either have the answer or be able to find the answer to any questions about the campaign.

Be sure to close the loop on any pending questions, keep your Campaign Leader informed of your progress and ensure you've reached out to everyone on your list.

Celebrate

Finally, regardless of their choice, show your appreciation with a note of thanks, and invite them to attend celebratory events and programs in your federal organization!

5. Impact and behavioural science

You are encouraged to weave impact and behavioural science into all elements of the campaign. This will increase your success in engaging effectively with your colleagues.

First, it is important to understand what each of these mean.

Impact

In fundraising, impact is the tangible difference that money raised through fundraising efforts makes in achieving a charitable purpose or mission.

Behavioural science

Behavioral science is the application of insights from psychology, economics, and other related fields to understand and influence donor behaviour to improve fundraising outcomes.

There has been a significant amount of research on what behavioural cues you can use to increase success in your campaign. One of the main cues you can use is showcasing impact, which is why the bulk of your messaging and events should focus on impact.

How this helps your community

Using speakers, testimonial videos, stories and posters from United Way Centraide and HealthPartners provides tangible proof and shows the positive impacts of a donation. There are lots of different resources available at www.gcwcc.org but if you're looking for something else, reach out to your Local Manager to see what they have available.

When your colleagues see how a donation to United Way Centraide helped a young girl be successful in school because she had a healthy breakfast, or how the senior was provided with customized equipment for their disease it makes it personal, tangible and real. People don't remember facts and figures easily, but they remember how they felt in a certain situation. Impact stories and speakers allow people to feel the value their donation provides. People prefer to be inspired and feel like they are a part of the solution!

Why you choose to give

Likewise, share your story or ask your colleagues to share their own story about why they choose to give. When someone we know has benefited from a service, we know there is truth and sincerity in their experience so not only do we feel compassion, but we trust the source and are likely to feel empathetic for them. We begin to wonder what would have happened if that service wasn't available to them when they needed it? What if it isn't available to me if I ever need it? Supporting these services is similar to an insurance you are paying for you, your loved ones, your friends and colleagues. You hope you'll never have to use it, but want to be sure it is there for you if and when you need it.

Behavioural science cues

There is a lot of behavioural science behind how we ask for a donation – what are key phrases we can use? How do we structure the messaging?

ASIDE FROM SHOWCASING IMPACT, HERE ARE SOME CLEAR AND TANGIBLE BEHAVIOURAL SCIENCE CUES YOU CAN INTEGRATE INTO YOUR CAMPAIGN:

- **Make a clear and direct ask** after having a personal conversation.
- **Canvass before you host fundraising events.** Otherwise you will be faced with donor fatigue (frustrated with hearing about the campaign and therefore unwilling to donate) and the donor checkbox mentality (I've bought a \$5 muffin at a bake sale, that's my donation and I'm done). If you ask for a donation first, you will likely get a larger amount, and they'll still buy the muffin in November anyways because everyone loves a good muffin!
- **Using an emotional (either positive or negative) tone** over neutral increases response rate by 13-15%.

- **Personalized greetings and messages**, as well as using “I/you” in your messages increases engagement.
- **Repeat the message several times.** In an email, make two indirect asks and one direct ask for a donation. In your overall communications strategy, repeat messaging at least three times, and in your canvassing strategy, share impact three times.
- **In emails, subject lines matter** – pay attention to your subject line to ensure it is appealing and provides a reason to click the email and open it.
- **By using the word “because” in your messaging, you can increase your chance of a positive response** (a donation) by 33%. For example: “Would you consider making a donation through the GCWCC - because it will change lives in your community!”
- **Offer incentives:** consider early bird draws or individual fundraising goals (peer to peer campaign) with prizes or milestone incentives (The Deputy Minister will wear a dinosaur costume for a week if we hit our target by the end of the month). Note: be sure to remain compliant with provincial and federal law when creating incentives that involve charitable gaming, draws, etc. You should work with your Local Manager on this to ensure compliance.
- **Consider the culture of your own federal organization** and discuss with your Local Manager how to best capitalize or adjust your strategy to address this.
- **Promote payroll deductions** as individuals can make a larger gift over time for smaller amounts automatically.

**Overall, keep in mind that a person should feel moved to give.
By understanding the impact of their donation and making a personal
connection with the Named Recipients, they will gladly make a donation
and hopefully become a lifelong donor.
Be sure to engage with your Local Manager for other tips and tricks
to support your fundraising efforts!**

6. Communications and Marketing

This campaign relies heavily on effective communications and marketing, particularly when employees are spread out across offices, provinces and may even be working remotely. The only consistent means of interacting with employees is through strong communications tools that address this reality. If you are unable to develop tools and resources yourself, rest assured that there are plenty of national tools, messages and visuals created each year that you are encouraged to use.

Communications Methods

Depending on your age, experience and background, you have a preferred method of communication. Older generations prefer phone calls while younger generations prefer text messages. Those in sales prefer in-person conversations while web developers may prefer email communications. So, it's important to have a strategy to engage all the different communications tools available to you. Some employees won't read your emails, but they will pick up your phone call (or Teams call). One person will watch a video about impact, while someone else prefers to read about it.



This is why it is important to integrate all communication methods into your campaign - so you can successfully interact with all audiences in your federal organization.

HERE ARE A FEW DIFFERENT WAYS TO COMMUNICATE WITH YOUR PEERS:

EMAIL CAMPAIGNS

Use targeted email campaigns to reach employees directly with personalized messages tailored to their interests and preferences. Segment your email list based on factors such as department, job role, or previous engagement with the campaign. Bonus tip: update your email signature to include a link to donate to the GCWCC.

INTRANET AND INTERNAL PORTALS

Use your organization's intranet or internal portals to share campaign updates, resources, and success stories. Create dedicated campaign pages or sections where employees can access information, participate in discussions, and track progress.

SOCIAL MEDIA

Leverage social media platforms to amplify your campaign message and engage employees across different channels. Share campaign highlights, user-generated content, and interactive polls or challenges to encourage participation and social sharing.

PRINT MATERIALS

Develop print materials, such as posters, flyers, and brochures, to promote the campaign in common areas like break rooms, hallways, and bulletin boards. Customize these materials with messaging and visuals that resonate with different employee segments. Bonus tip: use a QR code so people can easily access the donation page.

FOR ADDED VALUE, CONSIDER HOW YOU CAN INTEGRATE THE FOLLOWING ELEMENTS:

- **Segmentation:** Divide your employee audiences into segments based on demographics, interests, or engagement levels. Customize your messaging and communication tactics for each segment to ensure relevance and resonance.
- **Dynamic Content:** Use dynamic content techniques to personalize messages based on individual preferences or behaviour. Incorporate variables such as name, department, or past interactions with the campaign to create a more personalized experience for each potential donor.
- **A/B Testing:** Experiment with different message variations and delivery methods to identify which resonates best with each employee segment. Conduct A/B testing on email subject lines, content formats, or visual elements to optimize engagement and response rates. Then, you can measure the results of each test and adapt your campaign tactics accordingly.
- **Feedback and Surveys:** Solicit employee feedback through surveys, polls, or focus groups to better understand their preferences and needs. Use this input to refine your messaging strategy and tailor future communications to better meet their expectations. When doing so, be sure to follow up with participants to thank them for their feedback and let them know some of the key takeaways. Too often, participants feel their data has disappeared into a void so it's important to show that the feedback is going to be considered and may create tangible changes.

CRAFTING YOUR MESSAGE

Developing a clear and inspiring campaign message is essential for effective communication strategies in a workplace campaign. A compelling message captures the essence of the campaign, resonates with the audience, and motivates action. Each year, there are national key messages that are created and you should integrate these into your own messages as well.

Here's how to craft a compelling message for your own organization:

- 1. Identify the core message:** Begin by defining your campaign's core message. What is the primary purpose or objective? Keep it simple, concise, and memorable and tie it to the campaign goal. Ideally, your message should be conveyed in a single sentence or phrase.
- 2. Understand and segment your audience:** Begin by understanding your target audience - the employees within your organization. What are their interests, concerns, and motivations? Organize them into groups that share similarities and tailor your message to resonate with their distinct values and priorities. While there will be one main message, you may want to consider secondary messaging tailored to various demographics in this audience.
- 3. Focus on impact:** Highlight the campaign's impact and outcomes. Communicate how employees' participation and contributions will make a difference. Use specific examples, stories, or statistics to illustrate the tangible results that can be achieved through collective action. When you take the time to outline the needs that exist, you demonstrate why this culture of generosity is crucial to strengthening programs, to supporting organizations and to doing better. See the [Impact and Behavioural Science](#) section for more information.
- 4. Use storytelling techniques:** Storytelling is a powerful tool for making workplace campaigns more relatable and inspires employees to support meaningful causes. By incorporating personal stories and highlighting the real-world impact of donations, you can make workplace campaigns more relatable, emotionally compelling, and effective in inspiring employees to support worthy causes.
- 5. Inspire through emotion:** Appeal to your audience's emotions to evoke empathy, compassion, or excitement. Connect your message to a compelling narrative or cause that stirs emotions and ignites passion. Emotionally resonant messages are more likely to capture attention and inspire action than bland, generic content. Remember, employees are people first and you are engaging them as a potential donor within the workplace charitable campaign.
- 6. Use authentic language:** Use authentic and inclusive language that reflects your organization's culture and values. Avoid jargon or overly formal language that may alienate or confuse employees. Speak in a tone that feels genuine, relatable, and inspiring.
- 7. Create visuals:** Supplement your message with compelling visuals, such as posters, infographics, or videos, to enhance its impact and appeal. Visuals can help convey your message more effectively and capture attention in a busy workplace environment.
- 8. Consistency is key:** Ensure consistent messaging and branding across all communication channels and materials. Whether email announcements, intranet posts, social media or in-person presentations, maintain a cohesive message reinforcing the campaign's purpose and goals. The best way to do this is to create a wholesome communications strategy with a critical path and timeline. Much of the content can be drafted in advance.
- 9. Encourage engagement:** Encourage two-way communication by inviting employees to share their thoughts, ideas, and feedback on the campaign message. Create opportunities for dialogue and collaboration, fostering a sense of ownership and involvement among participants.



10. Include a clear call to action: Clearly outline the actions you want employees to take in response to your message. Whether donating, volunteering their time, or spreading the word, provide clear and actionable steps that empower employees to get involved.

11. Thank your audience: Thanking your audience helps build relationships, and when done well, can encourage future involvement and gifts, whether that be through volunteering or being a champion for the organization. It can also inspire others. When they see their colleague is passionate about a cause it can inspire them to support as well.

12. Measure and adapt: Continuously monitor the effectiveness of your campaign message and be prepared to adapt as needed. Solicit employee feedback, track engagement metrics on web platforms, and adjust your messaging strategy based on insights and learnings. Remember to create targets in advance that can be measured, and benchmark your results year-over-year to see where you are gaining ground and what can be improved.

By developing a clear and inspiring campaign message, you can effectively communicate your workplace campaign's purpose, impact, and importance, inspiring employees to participate and support the cause.

BUILD A CULTURE OF GENEROSITY

Promoting your campaign and emphasizing the positive impact the GCWCC has in our communities, as well as across the country, contributes to building a culture of generosity.

SOME IDEAS TO BUILD A CULTURE OF GENEROSITY:

- **Raise awareness early on.** If your team is eager to do volunteer work, plan it ahead of the campaign period. It will help you focus on fundraising in the fall. Contact your Local Manager to plan volunteering opportunities.
- **Visit the Communications Tools section on the campaign website** to get the latest tools available: stories, templates, graphics.
- **Work with equity, diversity and inclusion groups**, as well as young professional networks to leverage, amplify and engage with your content.
- **Use personal stories to humanize the cause** and put a face to the impact. Share anecdotes, quotes, or interviews highlighting the experiences, emotions, and aspirations of individuals affected by the cause. Make the stories relatable by focusing on universal resilience, hope, and transformation themes.
- **Highlight a diverse range of personal stories** to reflect the breadth and depth of the campaign's impact on Named Recipients. Include stories from individuals of different backgrounds, ages, and circumstances to resonate with a wide audience and foster inclusivity.

- **Clearly illustrate how donations directly contribute to the real-world impact** showcased in the personal stories. Show the cause-and-effect relationship between financial support and tangible outcomes, whether providing essential services, funding life-changing programs, or empowering individuals to overcome adversity.
- **Share success stories and milestones achieved** due to previous fundraising efforts. Highlight the progress made, the challenges overcome, and the lives transformed through the collective generosity of donors. Celebrating success stories reinforces the importance of ongoing support, inspires confidence in the campaign's effectiveness, and encourages employees to become dedicated supporters in future campaigns.
- **Encourage employees to share their own stories** or experiences related to the causes. Empowering employees as storytellers fosters a sense of ownership and engagement in the campaign.

SHOW GRATITUDE

As with every element of this campaign, **be sure to integrate gratitude and appreciation** into your messaging. Refer to the [Recognition section](#) below.

7. Events

A comprehensive events guide has been created for the GCWCC and is available online. Please refer to that document for detailed step-by-step instructions. A short summary is available [in this section](#).

NOTE: YOU SHOULD BUILD EVENTS COLLABORATIVELY WITH YOUR LOCAL MANAGER, THEY OFTEN:

- Have access to affordable tools and platforms, that are free to you
- Have ideas on how to ensure your event is successful
- Can support with promotional materials
- And more!

THE STEPS TO A SUCCESSFUL EVENT INCLUDE:

1. Identify the event's purpose and use it to guide the planning

Events are meant to support fundraising efforts and to help build a lifelong donor, not just collect a one-time contribution. Events should follow canvassing efforts so as to complement the campaign's efforts. The core principle of your event(s) should always be one of the following:

- **Fundraising:** focused on raising money for the Named Recipients. There is a clear call to action that ensures the participant is being asked to contribute financially in some way. This could be via an admission fee, a peer-to-peer donation, or by purchasing something. Regardless, above and beyond any fees or purchases, there should be a clear call to action requesting a donation.
- **Impact:** to raise awareness about the GCWCC and the Named Recipients and hopefully acquire new donors. It will focus on testimonials, addressing questions, and what the NRs have to offer as charitable organizations.

2. Create a timeline that complements canvassing

In planning your event(s), it is essential to build your timeline collaboratively with your campaign team. Whether the entire campaign in your organization is going to run for three weeks or three months, you need to ensure your event planning aligns with the overall campaign and doesn't undermine canvassing efforts.

3. Work with your communications colleagues for promotion

Every event will require promotion to help meet its goals. If no one knows about the event, no one will show up, and no money will be raised. Integrate promotions and outreach into your timeline and use a variety of emails, posters, pop-ups, or other solutions to let people know about the event.

4. Educate – Donate – Celebrate

Whether an event is virtual or in-person, in order to successfully support the campaign, there are three key elements to include:

- **Educate**
This is the ideal opportunity to bring awareness to the impact of the charitable organization, and there are many creative ways to do that. Have a speaker attend and provide testimonial, or have a display of new versus old medical equipment, or school supplies and the how much more affordable it is when charities can take advantage of in-kind corporate support, stretching your dollar further. Answer questions about the campaign and the affiliated organizations honestly and transparently to alleviate any hesitancy a potential donor may have.
- **Donate**
Make a clear call for participants to make their campaign pledge and provide the tools to do so easily: QR codes, short URLs or even a computer for them to submit their information on the spot. Costs to participate in events are not considered donations or pledges, but the event itself is a way to open the door for a potential donor to make that pledge.
- **Celebrate**
This is the event itself - take the opportunity to thank those who have donated and have fun with whatever activity has been planned!

5. Create key performance indicators, review and provide recommendations

Taking an honest, critical look at your events will help you improve them and adapt your campaign in the future. This is why it's important to create key performance indicators (KPIs, measures of success) for each event.

Host a debrief meeting where you review your KPIs, budgets and any other feedback collected to determine whether the event was successful. It is crucial to have open and frank conversations and using the KPIs as objective measures will support that.

Events are the icing on the cake of fundraising, so keep that in mind as you plan. The key events we recommend integrating into your campaign are:

1) A kickoff/launch event

This will build excitement and unite everyone. It's your first opportunity to raise awareness about the campaign and the Named Recipients, while also sharing what people can expect throughout. Be sure to focus on impact and your organization's goals for the campaign!

2) A wrap-up/appreciation event

Celebrate employee giving, share your accomplishments and announce the results. Most importantly, be sure to thank all volunteers and donors!

3) Bonus: try to integrate flexibility into your campaign so if near the end of the event you need to pivot and try something new, such as a Sprint Week, you have the ability to do so.

OTHER THINGS TO KEEP IN MIND FOR EVENTS ARE:

- **Have a dedicated volunteer** for events if you are going to have several so that other volunteers can focus on their main tasks (do not use Ambassadors as event coordinators).
- **Ensure you only use payment platforms offered by Local Managers.**
- **Consider using Andar for event payments** to ensure your results are available in your reports immediately.
- **Consult your applicable values and ethics/privacy teams to obtain guidance with respect to** how information is to be used in the context of specific recognition events/activities.
- **Incorporate interactive elements** like live Q&A sessions, virtual networking opportunities, and gamification to enhance attendee participation and enjoyment.
- **Remember:** As per the Treasury Board Secretariat – United Way GCWCC Agreement, all event funds are exclusively allocated to the Named Recipients. Event funds cannot be designated to a specific charity.
- **Remember:** charitable tax receipts are not issued for fundraising events in most cases.





A note on charitable gaming:

The Criminal Code of Canada was amended in 1970 to permit certain types of lottery schemes if they are conducted and managed by a province (such as 6/49, Superstar Bingo, casinos), or, by a charitable or religious organization pursuant to a license issued by an authority named by the Lieutenant Governor of a province.

In most provinces, charitable gaming includes games of chance such as bingos, raffles, 50/50 draws, Catch the Ace, and breakopen tickets. The specific kinds of activities may vary but they all must have the underlying requirement that the activity is for the purpose of raising funds for a charity.

As charitable gaming is provincially regulated, entities eligible to apply for a gaming license will vary. As a government organization, you are technically not an eligible applicant even though you are raising funds for charitable purposes. However, in some provinces arrangements have been made with the provincial licensing authority to enable you to apply directly for a charitable license.

In all cases, departments should consult with their Local Manager before engaging in charitable gaming to ensure compliance and agree upon the logistics, particularly as it relates to processing funds.

With many employees working remotely, charitable gaming may not be an option since online gaming is regulated differently. In some provinces, a license for online gaming can only be issued to a charitable organization, or is not even permitted at all.

It is important to note that to be considered GCWCC revenue, all activities and events, including charitable gaming, must follow the guidelines related to the GCWCC.

8. Recognition

Showing appreciation and giving thanks is a great way to build and maintain relationships with your colleagues, volunteers and donors. A simple “thank you” goes a long way, but it is also encouraged to be intentional and focused, integrating all the different languages of appreciation:

- **Words of affirmation:** say thank you to them, offer a compliment or kind word.
- **Quality time:** go for a walk, grab a coffee together, or just spend a few extra minutes on a Teams call asking how their day is going.
- **Acts of service:** help carry bags to the event, let them know you’re great with Microsoft Word and help them when they have a formatting issue, review a presentation for before they finalize it.
- **Tangible gifts:** Provide a gift card to Tim Hortons, or a small token of appreciation. If you make homemade jam, give them a jar. Host a recognition or celebration event at mini golf or with some free appetizers.
- **Physical touch:** A firm handshake or pat on the back to show your appreciation.

NOTE: *Please ensure you remain compliant with all office policies when considering the different languages of appreciation. There are a lot of different ways to show your gratitude meaningfully, so people feel appreciated and therefore want to continue to support the campaign. Always keep in mind some people do like public recognition and others don't, so give them the option for public recognition before doing so, and ensure you are compliant with all privacy regulations.*

OTHER IDEAS FOR RECOGNITION INCLUDE:

- **Involve senior management:** have them speak at the event or send their own thank you message.
- **Send hand-written thank you cards or make direct phone calls.** Try to thank each person individually.
- **Acknowledge volunteers who have made an exceptional impact.**
- **Acknowledge volunteers in social media, newsletters, meetings, etc.**
- **Create a “recognition wall”** with your volunteers’ and donors’ names (who have agreed to be recognized as such and consult with your organization’s departmental Privacy, ATIP and Values and Ethics teams).
- **Use the recognition certificates** available online for volunteers.
- **Nominate volunteers** for the national GCWCC awards.
- **Try to thank Leader donors** (who have agreed to be recognized as such) personally.
- **Share your results** with the entire organization, recognizing the hard work everyone put in.
- **Share concrete examples** of the impact of their donations.
- **Host a recognition event** or integrate recognition into your closing event. Invite them to attend as guests of honour, where they can be publicly recognized, thanked, and celebrated in front of their peers.

**Both volunteers and donors deserve to be warmly thanked.
Let your colleagues’ generosity shine and make them proud of their actions!**

9. Monitor and Report

“THE DEFINITION OF INSANITY IS DOING THE SAME THING OVER AND OVER AGAIN AND EXPECTING DIFFERENT RESULTS.”



To grow and improve your campaign, it is important to monitor the key performance indicators (KPIs) and goals you will have created and provide recommendations based on the results.

NOTE: *a goal is a broad outcome you hope to achieve
and the key performance indicators measure how you get to that goal.*

In fundraising when setting goals, the most important thing to remember is not hitting your goal(s) is not considered failure.

A goal should be grounded in reality but also should challenge you to grow. If you don't hit whatever goal(s) you've set, you review what you did and how you can improve for next year. At the end of the day, you still have raised money for a good cause, even if you didn't hit your goal.

A successful goal is SMART (specific, measurable, achievable, relevant and time-bound). By reviewing your results from last year and anticipating your workplace environment as well as the broader civic environment, you'll be able to set achievable goals.

You should discuss your goals with your Local Manager – they understand the fundraising landscape in Canada and will be able to guide you in what is achievable from a fundraising perspective. This should be cross-referenced with the opportunities and challenges you see in your workplace to create a goal.

A financial goal should never be less than what you raised last year, unless there are dramatically extenuating circumstances. Keep in mind there are always going to be challenging circumstances of one sort or another, but dramatically extenuating would be what we would classify as force majeure situations: pandemic, war, wildfires, etc.

At minimum, a financial goal should be what you raised last year plus inflation. For example, if you raised \$20,000 last year and inflation is 2%, your goal should be \$20,400. However, you may also want to consider your pledge rate, employee attrition and/or other opportunities and challenges to adjust your goal accordingly. You may have a low pledge rate, so if you focus on increasing that by 2%, you will also increase your revenue proportionally.

You can create tangible fundraising goals as well as participation and engagement goals. It is recommended you have a minimum of two financial goals and one engagement goal.

HERE ARE A FEW MORE EXAMPLES TO CONSIDER:

- Increase **awareness of the Named Recipients** (consider a benchmarking survey to measure)
- Increase **number of donors**
- Increase **revenue by dollar or percentage amount**
- Increase **pledge rate**

- Increase **participation rate**
- Increase **donor retention rate**
- Increase **attendance at activities** or events
- Increase **the number of Leader donors**
- Increase **satisfaction with campaign activities** (consider a campaign survey to measure)
- Overall **employee satisfaction**

IN THE MONITOR AND REPORT STAGE, THERE ARE FIVE KEY STEPS TO IMPLEMENT:

1. Create key performance indicators and goals:

Define clear goals and key performance indicators (KPIs) for your campaign, such as donation revenue, donor acquisition rate, engagement metrics, or campaign reach. These will be benchmarks for measuring success and guiding data analysis efforts. Benchmarks can be based on historical performance, industry standards, or best practices.

Review the return on investment (ROI) of standalone activities and events to ensure it is competitive and reasonable as well as to work towards improving the ROI year-over-year. Calculate the campaign's ROI by comparing the total funds raised with the costs incurred to execute the campaign. Consider direct costs (such as marketing expenses, event costs, and staff time) and indirect costs (such as opportunity and overhead expenses) to determine the campaign's overall efficiency and effectiveness. For example, a print poster may cost more than an email strategy, and so shifting donors to an email platform will be more cost-effective, allowing more of the donor's dollar to go directly to the campaign. Likewise, events may cost half of what they're raising, when you want to be as close to zero cost as possible. You may have to re-evaluate. The goal is always to ensure as much of the contribution goes to the campaign as possible.

See above for examples and reach out to your Local Manager to discuss what goals and KPIs will work best for your federal organization.

2. Collect and analyze data

Using data analytics to measure and improve campaign effectiveness is crucial for optimizing strategies, identifying improvement areas, and maximizing workplace campaigns' impact. Your GCWCC Local Manager will help you to understand and analyze the results, highlighting trends and challenges.

Monitor and track relevant campaign metrics using data analytics tools and platforms. Track metrics such as website traffic, email open rates, click-through rates, social media engagement, donation trends, and event attendance to gain insights into campaign performance. If you are able to segment your data based on different audiences, it will allow you to better recognize patterns that may be opportunities to replicate or challenges to address.

Consider data you can analyze through ePledge, but depending on your goals, consider also: campaign surveys, debrief meetings, focus groups, etc.

You should collect the data at regular intervals throughout the campaign, as well as reviewing final results. In both cases, comparing against the previous year is the most stable comparison you can look at to monitor your progress. By tracking throughout the campaign against the previous year, you'll be able to recognize lags and where adjustments may be required so you can hit your overall goal(s).



3. Compare data against goals

Use data-driven insights to iterate and improve your real-time campaign strategies. Identify areas of underperformance or inefficiency and implement targeted interventions to address them. Continuously test, measure, and refine your tactics based on data analysis to optimize campaign effectiveness.

Look for patterns, correlations, and trends in the data to understand what's working well and what could be optimized. Identify any unexpected challenges or barriers that may have impacted performance. Based on the findings, adjust tactics, messaging, or targeting to optimize performance and maximize impact.

Compare your campaign performance metrics against internal and industry benchmarks and best practices to assess how your campaign compares. Identify areas where you're outperforming or lagging behind averages and use this benchmarking data to inform future strategy and goal-setting.

KEEP YOUR GCWCC LOCAL MANAGER, VOLUNTEERS AND SENIOR LEADERSHIP INFORMED OF PROGRESS AND ADJUSTMENTS THROUGH REGULAR UPDATES AND COMMUNICATIONS BECAUSE:

- **Sharing and having a conversation with your Local Manager** will help you to adjust the campaign strategy to increase participation and achieve your objectives during the campaign and in future years.
- **Senior management can do more** to encourage and engage your colleagues.

It is highly recommended you plan a mid-campaign review of the data halfway through your active campaign with your GCWCC Local Manager.

A mid-campaign review meeting will be a deliberate and intentional meeting to review the data so far and brainstorm suggestions to maximize or improve performance. It is too late to change or influence the results after the active campaign is over, which is why a mid-campaign review is extremely beneficial.

4. Provide recommendations

Assess your campaign's long-term impact beyond immediate outcomes. Start by comparing the campaign's actual results with the goals and objectives you set at the outset. If available, track donor retention rates, recurring donation trends, and overall engagement levels over time to gauge the sustained effects of your campaign efforts and identify opportunities for ongoing improvement.

Consider also the return on investment (ROI): how much effort or additional resources (financial, human) did different elements take against how much revenue it brought in. You may need to consider efficiencies, adaptations or elimination of certain aspects of your campaign plan if the ROI is too small.

NOTE: Generally, your expenses should be as close to zero as possible, but anything above 35% of the revenue of that aspect of the campaign is unacceptable.

Aggregate all the data you've collected (ePledge reports, surveys, debriefs, focus groups, etc.) to identify objective actionable insights and recommendations for improving the campaign. Prioritize interventions based on the most pressing issues identified through data analysis and develop targeted strategies to address them effectively. Consult with your Local Manager for feedback and recommendations.

Celebrate successes, acknowledge challenges, and identify lessons learned for future campaigns. Share key insights, learnings, and success stories derived from data analytics with stakeholders and team members. Foster a culture of data-driven decision-making and continuous learning within your organization, where insights from data analytics inform strategic planning and decision-making across departments.

5. Repeat

Each year, repeat these same steps again. Adapt your goals and review annually. Eventually, you'll also be able to benchmark against multiple years to make in-depth decisions and recommendations.

By evaluating the success of your fundraising campaign using these methods, you can gain valuable insights into its performance, impact, and effectiveness, informing future campaign strategies to enhance results and employee engagement.

10. Use your free local expert!

It's as simple as that – the benefit of United Way Centraide as your campaign partner is that you have access to a free, qualified local expert! Be sure to use them as much as you possibly can and you'll be guaranteed to reap the rewards.

GCWCC Local Managers are an integral part of running a successful campaign. You do not need to recruit them, they are available to you as soon as you start the planning process and throughout your entire campaign journey. They are experts in workplace charitable campaigns and fundraising overall.

In the context of a national campaign, you may deal with more than one Local Manager. You can find out who they are at gcwcc-ccmtgc.org.

NOTE: This is also why we recommend having Campaign Leaders in the different regions/areas/offices your organization has a presence in. If you are having trouble reaching a Local Manager, please contact the National Office.

Your Local Manager(s) can attend committee meetings to facilitate strategic planning, bring outside perspectives and provide professional fundraising expertise. They can provide history and continuity for your federal organization's campaign and are also a great reference for best practices. They have a responsibility to support you and help you succeed.

On a day-to-day basis, their role includes delivering training, providing fundraising advice and ideas, analyzing campaign results with the federal organization to provide guidance, collecting reports and donation forms (when used), supporting awareness raising activities, coordinating with the National Office and the Named Recipients, and so much more!



NAVIGATING OBSTACLES

Every workplace campaign has its own challenges, including the GCWCC. Some can be predicted and mitigated in advance, while others are unexpected. Here are a few key challenges you may encounter and some strategies to resolve them. If there are other obstacles you face, reach out to your GCWCC Local Manager for guidance.

1. Lack of Awareness or Interest:

One of the most common challenges is minimal awareness or interest among employees. Some employees may not be familiar with the cause or may not feel motivated to participate in fundraising activities.

STRATEGY: Increase awareness and generate interest through targeted communication campaigns

Targeted means using stories, information and data that will resonate better with your employees. Integrate your organizational culture into your communications with support from your GCWCC Local Manager. Use multiple channels, such as email newsletters, intranet announcements, posters, and social media, to educate employees about the cause, highlight its importance, and inspire participation. Share compelling stories, testimonials, and success stories to make the cause more relatable and emotionally compelling. As well, if you are aware of key concerns or hesitancy around the campaign, integrate this into your awareness campaign.

Empower employees to take ownership of the GCWCC by involving them in the planning, decision-making, and implementation. Provide incentives, rewards, or recognition for pledges, participation, and achievements to motivate employees and reinforce their contributions. Foster community and camaraderie by organizing team-based fundraising challenges, competitions, or events, encouraging collaboration and teamwork. Don't forget to thank employees for their involvement either. Those that are active in the GCWCC are the cornerstone of your campaign!

2. Limited Resources or Budget:

Organizers may struggle to allocate sufficient funds, time, or human resources to plan and execute GCWCC initiatives effectively.

STRATEGY: Get creative with resource allocation and leverage available assets to maximize impact. Consider securing in-kind support or venue space for fundraising events. Focus on low-cost or no-cost initiatives, such as virtual events or DIY fundraising campaigns, to minimize expenses while maximizing fundraising potential. Use your GCWCC Local Manager as a team member available to support you with people power and internal tools, technology, etc. that they have readily available.

3. Competing Priorities and Time Constraints:

GCWCC initiatives often compete for attention and resources with other organizational priorities and initiatives. Employees may juggle multiple responsibilities and struggle to find time to participate in the GCWCC.

STRATEGY: *To accommodate employees' schedules and preferences, offer flexible participation options, such as remote participation or asynchronous fundraising challenges. As well, integrate GCWCC activities into existing organizational events or initiatives to streamline participation and minimize disruption to employees' schedules. Incorporate GCWCC elements into team-building activities, meetings, or volunteer days to make it easier for employees to get involved.*

4. Measuring Impact and Effectiveness:

Lastly, measuring the impact and effectiveness of GCWCC initiatives can be challenging, especially if organizers lack the tools or expertise to track and evaluate outcomes accurately.

STRATEGY: *Be sure to use your free local expert; connect with and lean on your GCWCC Local Manager. Establish clear goals, objectives, and performance metrics with them for your fundraising initiatives to guide measurement and evaluation efforts. Ask your GCWCC Local Manager to share performance data to assess progress, identify areas for improvement, and optimize strategies for maximum impact.*

By identifying common challenges in the GCWCC and implementing targeted strategies to overcome obstacles and setbacks, organizers can enhance the success and sustainability of their fundraising initiatives, ultimately making a meaningful difference in support of their chosen cause.

FUTURE TRENDS

Staying attuned to future trends supports the GCWCC's growth, long-term success, and effectiveness. Future trends are both internal and external: what are the demographic shifts that are influencing the workplace culture, employee priorities, as well as campaign results? Equally importantly, how do we respond to them to maintain relevancy in the workplace? Below are some current internal and external trends in the GCWCC for consideration:

Campaign Trends

- The highest average employee donation continues to come from monthly donations, followed by payroll pledges, then one time donations.
- There is room to improve public trust in the campaign by increasing education and awareness.

- Events continue to be popular but can be improved by integrating philanthropic best practices. Campaigns that are “top-heavy” with events are leading to donor fatigue before the individual has made a donation. It also causes the “checkbox” mentality (‘I’ve made a donation by participating in an event’).

Philanthropic Trends

As part of our mandate, the GCWCC National Office actively monitors philanthropic trends in Canada and across North America.

KEY TRENDS RELEVANT TO THE GCWCC INCLUDE:

- **A broad trend of less donors giving larger contributions.** The donors tend to be older generations who are loyal and committed donors increasing their donations as circumstances allow. However, it is widely recognized that this is not a sustainable model, and new donors need to be stewarded to remain sustainable
- Across generations, there is a desire for trust and transparency. Emerging trends include **greater transparency around how donations are used** and improved reporting on impact and outcomes.
- Potential donors are seeking out information through online tools and spending an average of 3 to 5 minutes researching the organization or cause of choice. **Older generations look at an organization’s website or charity review sites, while younger generations focus on social media research.**
- When researching a charitable cause, all supporters are **looking for information about reputation, impact and efficiency.**
- **Donors of all ages appreciate visible recognition.** This can be through thank you emails or impact updates. Increasingly popular among younger generations is recognition on social media, in newsletters, and in reports.
- Showcasing impact and storytelling using appropriate language, tone and style are critical to successful fundraising. **Using emotional language and specific examples** leads to more successful fundraising results.
- Gen Z and millennials can be stewarded through volunteering their time, **promoting causes on social media, and participating in advocacy.**
- **Most donors will donate if it’s easy to do** so, while also using their preferred donation method.
- Workplace giving programs are becoming more flexible to accommodate donors’ diverse preferences and lifestyles. Emerging trends include **flexible giving platforms** that allow employees to donate through payroll deductions, one-time gifts, or employer matching programs, as well as the option to give to various causes and nonprofits.
- **Word-of-mouth continues to be a leading tool of influence:** 40% of donors use word-of-mouth as an important source of information. The opportunity here lies in fostering promoters/influencers/ambassadors/canvassers.

By exploring emerging trends in workplace giving, organizations can stay ahead of the curve, adapt to changing donor expectations, and maximize the impact of their giving initiatives in support of meaningful causes and social change. Consult with your GCWCC Local Manager regularly about campaign and philanthropic trends and how to capitalize on them.

CONCLUSION

This document is meant to provide you with detailed guidance on how to effectively execute your own campaign under the GCWCC. It has provided an explanation of what the GCWCC is, what the rules are, how it is structured, and what the best practices are to implement a successful campaign. In order to be successful, follow this guiding document and work closely with your GCWCC Local Manager. Know there are several great resources available to you at www.gcwcc.org and via the National Office (team-equipe@gcwcc-ccmtgc.com). You are encouraged to use them as much as possible because they are invested in your success, which in turn becomes the success of our communities. Every dollar raised makes a meaningful difference.





THANK YOU

for taking the time to read this guide
and understand best practices
in the GCWCC, we wish you the best
of luck in your campaign!