Change starts here.

UnitedWay@work
United Way of the Alberta Capital Region
Phone: 780.990.1000 **Fax:** 780.990.0203
Email: uwatwork@myunitedway.ca

Hello!

Thank you for choosing to personalize your campaign. Please complete this form at least 3 weeks prior to your desired campaign start date to ensure your site is up and ready for you.

As this document is designed to tailor your campaign for your needs, please ensure you complete it in it's entirety.

Please do not hesitate to contact your campaign manager at 780-990-1000 with any questions or concerns regarding this form.

Organization Name:* ____

Online Campaign Launch Date:* ______________ End Date:* ____________

* Required fields

Please Note: If you are using the built in PDF viewer in Google Chrome or Mozilla Firefox, the submit button will not function, therefore please save the form (file...save) and submit by e-mail attachment to informationservices@myunitedway.ca

Contact Information & Access Levels

Please review the access types outlined at the bottom of this page and indicate the appropriate level for each individual who will be part of your campaign.

Employee Campaign Chair Name:* ______________________________________
Phone Number: _____________________ **E-Mail Address:*** __________________
Access Level:* ______________________

IT Contact Name:* ____
Phone Number: _____________________ **E-Mail Address:*** __________________
Access Level:* _______________________ **TRA Qualified:** ☐

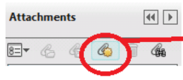
Additional employees that may require reporting/financial access

Name: ____
Phone Number: _____________________ **E-Mail Address:** __________________
Access Level: _______________________

Name: ____
Phone Number: _____________________ **E-Mail Address:** __________________
Access Level:________________________

If there are additional people, please provide on a separate sheet, or please attach a text document outlining the particular individuals and access levels by **Clicking Here**

Once pressed, the 'attachments' sidebar will display in Adobe Reader.



Click on paperclip to attach your file to this PDF

Access Types

A) Non-Financial Access (Most Common):

- View the campaign dashboard
- View and manage employee information such as contact details.
- Resend communications to individual employees (e.g. Welcome e-mail, reminder e-mail, and donation confirmation)
- Run a variety of reports that outline non-financial data associated with your campaign including decision rates.

B) Financial Access (Full Access):

- All Non-Financial Access Permissions
- View individual donation details including designations.
- Run a variety of reports that outline financial data associated with your campaign including donation breakdowns by individual employee.

C) Ambassador Access:

- Access to a single report outlining employee decision rates (e.g. decided, undecided, donated)

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@Work Questionnaire

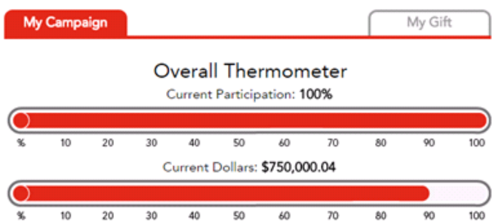
1. **What is your campaign participation goal?**

______%

2. **What is your campaign goal in dollars?**

$_____

3. **Which thermometer would you like visible to employees?**



This example displays both the dollar and participation thermometer. The dollar thermometer can be shown in percentages or dollars.

Dollars ______ Participation ______ Both _____

a) **If you would like a pledge thermometer visible, please choose how to display the results:**

Dollars ______ Percentage _________

b) **If you would like a participation thermometer visible please choose how to display the results:**

Donated ______ Decided ________

4. **Please provide instructional messages for those donating by cheque.**
(e.g. where or who to deliver the cheque to in your office)

5. **E-Mail Content**

Please see appendix to view e-mail content.

E-Mail Scheduling Example (Based on 2 Week Campaign)

	Monday	Tuesday	Wednesday	Thursday	Friday
Week 1	Welcome		Reminder 1		
Week 2		Reminder 2		Reminder 3/Late Bird	

6. **Please provide the details for your welcome e-mail below:***

From: ____

Date: ____ Time: AM ___ PM ____

7. **Please provide the details for your reminder e-mails below:**

First Reminder*

From: ____

Date: ____ Time: AM ___ PM ____

Second Reminder

From: ____

Date: ____ Time: AM ___ PM ____

Third Reminder

From: ____

Date: ____ Time: AM ___ PM ____

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Personalized Pledge Campaign (@Work)

Please provide a current electronic employee file in **Excel or Comma Delimited (CSV). United Way requires a minimum of 15 working days to produce your personalized campaign.**

Your employee file would typically include full names, organization name, e-mail addresses & locations. (e.g. Leduc)

Organization name:* ____
Your name:* ____
Email:* ______________________ **Phone Number:*** ______________________
Campaign Role:* ____________________________

Kick off date: ________________________________

Who should we contact with issues regarding the employee file?
Name: ____
Email: ______________________ **Phone Number:** ______________________

Data Requirements:

Please Indicate the number of pay periods your organization has: ___________

Would you like to include employee ID numbers? ____ If yes, please include them in the employee file.

Please indicate the group levels you would like to use for reporting, up to a maximum of six (6) levels. (For example; department, floor, team name). When no group levels are provided, your company's name will be used by default.

1. ______________________
2. ______________________
3. ______________________
4. ______________________
5. ______________________
6. ______________________

Please keep a copy of this completed form your records

Print **Submit**

Thank you!