

ECC Handbook

EMPLOYEE CAMPAIGN COORDINATOR HANDBOOK



United Way of Peterborough &
District

*Building Community,
Changing Lives...
Right Here, Right Now!*

September 2009

CONTENTS

	Page
Welcome!	2
Senior Staff and Volunteer contact list	3
About United Way	
Mission & Vision	4
Key Facts	5
What is United Way?	6
Where does a gift to United Way go?	7
Campaign Best Practices	
Best Practices Summary	8
Build Your Team	9
Canvassers	10
Analyse & Develop an Action Plan	11
Goal Setting	12
Kick-Off	13
Employee Canvassing	14-17
Special Events	18
Wrap-up, Recognition & Evaluation	19
Special Strategies	
Retaining & Increasing Donors	20-21
Involving Management	22
Involving Labour	23
Leadership Giving	24
Finance & Administration	
Employee Payroll Deduction Program	25
Tax Benefits and Receipting	26
How to complete the Pledge Form	27-28
Campaign Envelope Checklist	28
Appendices	
Frequently Asked Questions	29
Speakers Bureau	29
Sample United Way Speech	30

WELCOME TO THE 2009 UNITED WAY CAMPAIGN TEAM!

As an Employee Campaign Co-ordinator or a member of a United Way Campaign Committee, you have the opportunity to play an active role in helping our community. United Way is directed by community volunteers. Funds are raised in communities throughout Peterborough City & County and then distributed to agencies which help local residents.

Last year, thanks to the collective efforts of hundreds of workplace volunteers, employees and companies, at approximately 400 locations throughout Peterborough City & County, employees contributed \$1,295,000. to United Way, representing about 54% of the \$2,366,000 raised in total.

This year's campaign total represents \$18.48 in per capita giving for Peterborough & District.

Without you, there would be no way to provide this much-needed support to our Community.

Through United Way's agency review process, trained volunteers visited and/or assessed each agency that applied for funding last year. They made sure that every cent donated was well spent. Employee donations helped provide counselling for individuals and families, support for seniors and people with special needs living on their own, training for youth and people trying to re-enter the workforce, community health support services, food, shelter and much, much more.

Government cutbacks to social services means that United Way funding is more important than ever to our agencies. **We need your help** in our on-going effort to maintain a healthy, safe and caring community.

This guide is intended to provide you with the tools and information that you need to run the most effective campaign possible. In it you will find:

- Information about United Way
- Best Practices for successful campaigns
- Tips for retaining and increasing donors
- Strategies for special situations
- Finance and Administration information

In addition to reviewing this guide thoroughly and attending one of United Way's Employee Campaign Training Workshops, we suggest that you contact your United Way Campaign Staff support at 742-8839 as soon as possible to determine how United Way can give you a "helping hand."

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STAFF AND SENIOR VOLUNTEER LIST

Campaign 2009

Campaign Co-Chairs 2009

Susan & John Mackle

United Way Board Chair

Don Vassiliadis

United Way Staff

CEO

Len Lifchus

Director, Finance & Administration

Janice Abbott

Director, Labour Community Services & Development

Bill Astell

Resource Development Manager

Andre Vallillee

Resource Development Manager

Anne Driscoll

Executive Assistant

Kelly Countryman

Director, Organizational & Community Development

Lisa Smith

Youth Leadership Co-ordinator

Michelle McGovarin

Administrative Clerk

Cheryl Ellis

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Mission

"To improve lives and build community by engaging individuals and mobilizing collective action".

Vision

To do this, we aspire to:

- Energize and inspire people to make a difference
- Credibility and accountability in raising and distributing funds
- Provide meaningful opportunities for individuals to realize their potential by demonstrating volunteer leadership in service to community
- Reflect the diversity of the community we serve
- Craft human care agendas within and across our communities
- Build coalitions around these agendas
- Increase investments in these agendas by expanding and diversifying our own resource development and fundraising efforts and supporting those of others
- Ensure that these investments have recognizable impact

Objectives

In Peterborough City and County we achieve our mission and vision by:

- **Raising funds** through a unified campaign that maximizes financial resources available to enable member agencies **to improve our community's' quality of life,**
- **Allocating funds** to meet current and changing human care need in the community,
- **Promoting co-operation and co-ordination** among human care organizations,
- **Providing responsible stewardship** of resources to maximize community benefit from donor dollars,
- **Taking a leadership role** to advocate where appropriate to enhance the community's quality of life,
- **Providing training** and consultative services to enhance the **leadership of non-profit voluntary organizations,**
- **Communicating year-round** to enhance our image in the community and increase awareness of United Way,
- **Building a sustainable volunteer base** to fulfil the objectives of United Way

Values

- **Provide non-partisan leadership in social change** by focusing attention and resources on issues related to our mission.
- **Endorse innovation, partnerships and collective action** to stimulate new ideas, create opportunities and build relationships that advance our mission and build community.
- **Respect community wisdom and encourage citizen involvement** in mobilizing communities.
- **Encourage and promote volunteerism and volunteer leadership** in all that we do.
- **Demonstrate trust, integrity, transparency, efficiency, inclusivity and respect** in all our actions, programs and relationships by maintaining the highest ethical standards.
- **Embrace diversity** by reaching out to and building on the diversity within our communities and proactively removing barriers to participation.

Impact!

- United Way is unique in that we are the fundraiser with the broadest impact on our community's quality of life.

ABOUT UNITED WAY

United Way Key Facts

Campaign Results

In 2008 United Way of Peterborough & District raised \$2,366,000 for the community. This figure includes \$434,794 contributed by corporations, \$1,295,000 from workplace campaigns conducted in Peterborough County and City (this figure also includes donations designated from employees who work outside the immediate area) and community events raised \$133,346. Individuals contributed \$502,860 directly to United Way.

Funded Agencies

United Way funds 31 member agencies and 91 directly funded programs within Peterborough County and City, touching approximately of 1 in 3 people in our community. United Way supported agencies provide a wide array of programs and services that enrich the lives of children through adult role models and literacy programs provide youth with healthy minds and healthy bodies through peer counselling support, sports and camp programs. Services allow seniors and people with special needs to retain their dignity and independence through provision of warm and nourishing meals, friendships and tools for independent living. Adults and other family members obtain shelter, food and emergency services at times of crisis in their lives, as well as a variety of guidance and counselling programs to assist them in improving their life and coping skills. Without United Way many of these valuable programs and services could no longer be available in our community.

Fund Distribution

Each year a panel of trained volunteers visits the agencies funded by United Way to review their operational and financial efficiencies and effectiveness. This ensures that donor dollars are being directed where there is the most need in our community. The panel then makes their recommendation to the volunteer Board of Directors who approve the distribution of funds. In addition, local community organizations or groups can apply for funding for projects which will benefit the Peterborough County and City community.

Campaign Goal

It is essential that we grow our campaign dramatically to meet the increasing pressure being placed on agency resources. This year's goal will be set by our campaign volunteers in early September.

“Never doubt that a small group of thoughtful, committed citizens can change the world; it’s the only thing that ever has.”

- Margaret Mead

ABOUT UNITED WAY...

What is United Way?

United Way of Peterborough & District is a non-profit organization that was created 68 years ago to bring together financial and human resources in a common cause of caring.

In these times of increasing demand and decreasing government funding, United Way of Peterborough & District supports a network of 31 member agencies and 91 vitally important programs in the community.

A gift to United Way is the gift that does the most.

United Way has one of the lowest costs of fundraising of any not-for-profit organization. This is accomplished through the involvement of volunteers at all levels of the operation...governance, fundraising, community building and fund distribution. In addition, we use donated services and supplies wherever possible, and negotiate substantial discounts on items we purchase.

United Way simplifies your charitable giving. One gift to United Way supports a number of charitable causes. A single annual donation to United Way may be the only gift you need to make to support the causes closest to your heart.

We invest your donations wisely. United Way donations are entrusted to experienced and trained volunteers who decide where the funds will have the greatest impact. Every year, volunteers and professional staff review United Way funded agencies, examining their financial efficiency and effectiveness of service. You can depend on the quality of United Way funded agencies!

Donating to United Way is convenient. You can use payroll deduction, pre-authorized chequing, MasterCard, Visa, cash or cheque to make your United Way contribution.

United Way offers a full choice in donor options. Most individuals entrust their gift to the United Way Community Fund, allowing experienced volunteers and professional staff to determine where their dollars will have the greatest impact. Donors can also direct their gift to any registered charity in Canada or to another United Way.

Endowment Fund. The Forever Fund is United Way's permanent endowment fund. The fund ensures that United Way's tradition of caring continues into the future. There are a variety of different options that can be used for making charitable gifts to United Way. Bequests, life insurance, annuities, charitable remainder trusts, and strip bonds may be donated and donors may designate their gift to Special Interest, General or Administration Funds.

ABOUT UNITED WAY...

One gift goes many places

Giving to United Way helps approximately one in three people in Peterborough County and City. Chances are, United Way has helped someone you know.

United Way agencies give people a “hand up”. Your donation to United Way reaches 31 local social service agencies that provide essential services to children, youth, seniors, women, men, families, and people with illnesses and special needs. These agencies help prevent social problems and help improve people’s lives. Specifically your donation will be used to:

Enrich the lives of children. Children will benefit from adult role models, literacy programs, winter clothing, the capacity to participate in developmental activities, day camps and from improved parenting.

Youth are provided with opportunity to grow healthy minds and healthy bodies. Participation in skill training activities, peer groups and counselling helps our young people grow into self-sufficient, productive individuals and decreased their potential for conflict with the law. At risk youth are provided shelter and the support for a brighter future.

Keep seniors active in their community. Help older, often isolated, people maintain their quality of life and remain in their own home through programs such as telephone reassurance checks, respite care, friendly visiting, and transportation to medical appointments.

Assist adults and families in crisis. Ensure emergency or ongoing supports are there when needed such as distress lines, suicide prevention, emergency housing and food, individual and group counselling.

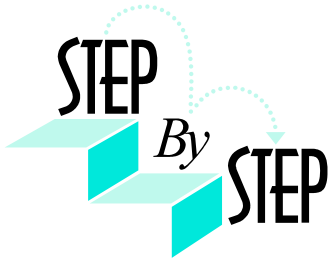
Help people with special needs live independently. Support people with physical and mental health problems through attendant, rehabilitation and other care services, and providing supports such as employment, education and skills development.

Help families become stable and self-sufficient. Help people help themselves through programs such as literacy programs, self-employment strategies, skills training, job search techniques and life skills training for people living on low incomes. Assist families in financial crisis through credit counselling programs.

Deliver health care support services. Provide support services to those coping with illness and those caring for others.

CAMPAIGN BEST PRACTICES...

Best Practices



At United Way of Peterborough & District, we believe that each campaign should be tailor-made to fit your organization. Using the Best Practices below, you can develop your most effective campaign yet!

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1. **Learn about United Way of Peterborough & District**
 - Learn about how United Way helps our community;
 - Find out how United Way can help you.
2. **Build your team**
 - Secure support from senior management/labour leadership;
 - Recruit a Campaign Committee and Canvassers.
3. **Analyse and Develop an Action Plan**
 - Review past campaign results;
 - Hold planning session;
 - Set financial and participation goals;
 - Develop an Action Plan;
 - Get Ready!!
4. **Kick-Off & Canvass**
 - Mark the beginning of your campaign with a Kick-off;
 - Canvass employees for their donations;
 - Monitor returns;
 - Mid-Campaign Review;
 - Re-canvass (if necessary).
5. **Hold Special Events**
 - Boost morale and campaign results by holding a *limited* number of special events AFTER your pledge card canvass.
6. **Wrap-up, Recognition and Evaluation**
 - Signal the end of the campaign;
 - Thank and recognize all donors and volunteers;
 - Pause to reflect on the strengths of your campaign and identify any areas of opportunity for next year.

CAMPAIGN BEST PRACTICES...

Build Your Team

Secure Support from Senior Management and Union Leadership

The successful campaign needs not only endorsement, but **active involvement** from top management. Be clear and concise in your requests and include the following:

- Approval of necessary release time during the workday for volunteers for meetings, kick-off, canvassing, etc.;
- Endorsement of employee campaign plans and goals;
- Appointment of a Leadership Chair from the management team who will sit on the campaign committee and co-ordinate the leadership canvass;
- Assistance in recruiting canvassers (if necessary);
- Letter to staff introducing campaign and campaign team and asking for support;
- Visible presence at all group meetings and campaign events and a “spot” on key management meeting agendas to solicit support;
- Authorization of a campaign budget to cover any costs incurred;
- Commitment to a corporate gift as recognition and support of what employees are doing in the community and if feasible, matching employee donations with a corporate donation.

TIP: Visible management/union involvement sets the stage for strong employee participation. Ensure that senior management and union leadership are present at all key events.

Recruit a Campaign Committee and Canvassers

Campaign teams vary depending on the size and structure of your organization. Your team should meet the following requirements:

- Reflect the structure and composition of your workplace, i.e. there is representation from each area/department/location of the organization, as well as cultural diversity and a max of management/union/support staff etc.;
- Each committee member is committed, with the appropriate skills and sense of responsibility to handle specific roles.

TIP: To increase donors, identify any specific areas with low participation rates and try to recruit a representative from that area as part of your committee.

CAMPAIGN BEST PRACTICES...

Build Your Team

Canvassers

While the Campaign Committee helps develop a plan and strategies, the canvassers are the actual front line volunteers.

Ideally, each canvasser acts as “ambassador” for the campaign to no more than 10 co-workers. They help each assigned co-worker to make an informed decision about charitable giving by:

- Explaining what United Way of Peterborough & District does and why it is important to support its work;
- Outlining your campaign timetable, prizes, events, etc;
- Requesting donations from co-workers;
- Providing United Way of Peterborough & District agency information;
- Answering questions and thanking donors.

Recruiting Canvassers

Effective canvassing begins with the selection of reliable, enthusiastic, committed volunteers. Canvassers should be:

- Representative of your total workforce to facilitate peer-to-peer canvassing;
- Well-liked and respected by their co-workers;
- Community or United Way volunteers, United Way of Peterborough & District donors or recipients of United Way services;
- Results-oriented and dependable;
- Able to ask for a donation without being self-conscious.

When recruiting canvassers, be sure to stress the benefits of the position and emphasize how much their involvement will mean to you, your organization and to the community. Tell them why you think they are the best person to do the job. Once a team member is recruited, confirm their appointment in writing. Perhaps your CEO will write letters of appreciation to team members, thanking them in advance for the important job they are about to do.

TIP: “People give to people”.

Having an effective canvassing team is one of the best ways to retain and increase donors. History shows that a one-on-one ask for a donation is the single most effective fundraising method.

CAMPAIGN BEST PRACTICES...

Analyse and Develop an Action Plan

Review Past Campaign Results

Before you begin to plan your campaign, analyse past campaign results in order to build on strengths and identify areas of opportunity.

Begin your analysis by gathering all available information on previous campaigns, including statistical data (United Way can provide you with a giving history of your organization.) If possible, set up a meeting with last year's Employee Campaign Co-ordinator.

Try to determine the following:

- The major strengths and weaknesses of previous campaigns, particularly last year's.
- Last year's goal? Did you achieve it?
- Overall participation rate and average gift amount?
- Participation rates/average gifts for each department, area or location of your organization (if applicable)?
- Average payroll donation versus the average cash/cheque donation
- Number of Leadership gifts (\$500+)
- Losses or gains from previous year, and reasons?
- How were new donors attained?
- Role of management/union in the campaign?
- Was canvassing effective? If not, why?
- Were special events effective? If not, why?
- Major recommendations for the upcoming campaign?

Once you have answered these questions, you are ready to start developing your campaign plan and building a team to achieve it!

TIP: If this is the first campaign for your organization, survey management and staff on their personal attitudes towards United Way and find out their personal giving history. Find out what will motivate them to participate!

CAMPAIGN BEST PRACTICES...

Set Financial and Participation Goals

Establishing **financial** and **participation** goals are one of the most important Best Practices in any fundraising plan.

After reviewing what your organization accomplished, set a realistic and attainable goal for this year's campaign. This will establish a clear direction and concrete objectives for your campaign team.

Financial goals should reflect an increase in actual dollars raised in last year's campaign after making any necessary adjustments identified during the course of your review.

Participation goals measure the number of employees who contribute as a percentage of the total number of employees. While the total dollar value of your campaign may fluctuate depending on the number of employees, setting participation goals will help your team stay motivated as it should always have an upward trend.

Where to Begin

- Review the results of your campaign analysis.
- Determine any factors which could effect this year's campaign – for better or worse!
- Work with your United Way Account Executive and staff support to develop strategies to address these situations.

Establish your Goals

Consider last year's results (if applicable) to set objectives for this year's campaign. Keep your goals realistic and attainable, but make sure they provide a challenge to your Campaign Team to keep them motivated. In addition to overall financial and participation goals, consider setting goals or challenges for specific departments or groups.

If no history of giving is available for the workplace to base a goal on you may consider assuming an average gift for your organization's employees using a formula of "15 minutes" from the bi-weekly pay. If a \$16 per hour employee contributes \$4 per pay that would be \$100 per year. Determine the average employee salaries and multiply that by the number of employees to set a goal. Another variation is a day's pay per year.

CAMPAIGN BEST PRACTICES...

Kick-Off

It is very important that every United Way campaign have a definite beginning and an end. A “Kick-off” is a means of marking the start of your organization’s campaign. It can be an event, a publicity blitz, or simply something fun and out of the ordinary that signals the start of the campaign. Remember, the “Kick-off” event should be an awareness and friend raising event not a fund raiser. It can jeopardize the results of your campaign if it is used as fund raiser.

Here are a few ideas that have been successful. Talk to your United Way Account Executive and staff support to develop a kick-off that is just right for your organization.

- Place a balloon at each employee’s work station, along with his/her United Way pledge form, a United Way information brochure and some key facts about your campaign (i.e. goals, canvassing dates, special events etc.).
- Position senior management at each entrance to greet people and hand out free coffee/balloons as people come into work.
- Hold a pancake breakfast or barbecue lunch where senior management/union executives act as celebrity chefs. Try to get all ingredients donated and provide food to employees for free. Please be aware that local vendors are often asked many times a year for donations. Please be sensitive and understanding if they can’t accommodate your request.
- Hold group meetings to introduce the campaign and show the United Way video. Hand out free bags of popcorn as people enter the sessions.
- Invite a United Way Speaker from a member agency and/or UW staff/volunteer through our Speakers Bureau program to present on the work of United Way in our community.
- Launch a publicity blitz. Mobilize a team to display posters, thermometers and any promotional material in prominent places (i.e. entrances/exits, elevators, bulletin boards, washrooms, coffee stations etc.) throughout your organization.
- At the very least, send out an endorsement memo to all employees from your CEO, President etc. outlining the highlights of your campaign and asking for full support.

Whatever you decide to do for your kick-off, be sure that it reaches every employee and it is an event, that it is well-publicized and appeals to a broad range of your employees.

*“Money is not given, it has to be raised.
Money is not offered, it has to be asked for.
Money does not come in, it must be ‘gone after.’”*

Anonymous

CAMPAIGN BEST PRACTICES...

Employee Canvass

Canvass Employees for their Donations

An effective canvass is the single most important element of your campaign. Whether you canvass each employee individually, or hold a group canvassing session with one-on-one follow-up, it is important that each employee be approached individually.

TIP: The number one reason people don't contribute to United Way is because they were never asked. The primary objective of an effective campaign is to make sure that every employee is asked to participate, face-to-face, and hopefully by a peer.

Plan for Canvassing Essentials...

- Obtain United Way training and supplies for canvassers;
- Set a definite timeframe for canvassing of one to two weeks maximum;
- Establish method for canvassing every employee, including part-time and contract workers;
- Ensure a retiree canvass is run. Many times retirees have been long time United Way supporters;
- Incorporate, if possible, group and one-on-one **FACE-TO-FACE** canvassing. With appropriate 'time';
- Canvass employees in preferred language;
- Have a employee/canvasser ratio of ten to one if possible;
- Prepare canvassers with all campaign information, giving history for their employee group and specific individuals. Incorporate ways to reward donors through incentives and recognition;
- Establish monitoring and reporting systems;
- Establish a re-canvass strategy if goals are not met in initial canvass.

TIP: Develop an incentive program to encourage early donations. Everyone submitting a pledge card by a certain date could be eligible for a prize draw.

Giving Guidelines

At United Way of Peterborough & District, we believe that charitable giving is a personal decision. During the course of the campaign, however, you could be asked by a potential donor "How much should I give?". Here are a few options you may want to consider when answering the question:

A giving guideline commonly used for:

- Hourly employees is "**15 minutes per pay**".
- Salaried employees is "**one days pay**"

Some organizations build "giving guidelines" into their campaign theme and **compare donations per pay to everyday purchases**. For instance, ask employees to consider giving the costs of a cup of coffee a day or a coffee per week to United Way. Some individuals (particularly high income earners) may be interested in the **tax benefits** of charitable giving.

CAMPAIGN BEST PRACTICES...

Canvassing Methods

Group Canvassing with One-on-One Follow-up

This is probably the most commonly used method. It involves holding group canvassing sessions, with personal face-to-face follow-up to answer questions, reinforce the request for support and collect donations.

Group Canvassing Time Guide

- 1) Distribute United Way materials and pledge cards as employees enter meeting room.
- 2) Meeting:
 - Called to order by CEO;
 - Welcome;
 - Endorsement of United Way Campaign;
 - Acknowledgement of a corporate gift (if applicable);
 - Introduction of ECC and UW staff support.
- 3) Remarks by ECC supporting United Way:
 - Mechanics of the pledge card:
 - i) Concept of suggested guide for giving;
 - ii) Pledge cards collected at end of meeting.
- 4) United Way testimonial by employee:
 - Description of an agency visit or agency speaker;
 - How the agency helped the employee or friend/member of their family;
 - His or her role as an agency volunteer.
- 5) United Way Campaign Video.
- 6) United Way Case for Support:
 - Presented by UW staff support, agency representative or ECC.
- 7) Conclusion of Meeting:
 - ECC states his or her case;
 - Employees fill out contribution cards (may be completed later);
 - Collect pledge cards;
 - Thank everyone for coming.

Total time: 20 – 30 minutes.

CAMPAIGN BEST PRACTICES...

Re-Canvass

Since thorough canvassing is the key to a successful campaign, it is sometimes necessary to re-canvass people after the initial approach.

Re-canvassing acts as a gentle reminder to those who have forgotten to submit their donations, and gives you the opportunity to raise additional funds. By carefully monitoring your campaign progress, you will know whether or not it is necessary to activate your re-canvassing plan. Here are some successful re-canvassing techniques:

- Hold a meeting with your canvassers. Poll them to see who has completed all their face-to-face meetings and what the results were. Identify any key issues and address them immediately.
- Send out a short reminder note from your Campaign Committee or President, outlining community needs, campaign results to date, and stressing the urgency of submitting pledge cards. (This could be included in employees' pay envelopes).
- Distribute a second pledge form with a memo reminding people of what their donation could do to help the community.
- Extend your campaign if you do not meet your goal. Let all employees know about the extension and tell them why their support is needed. SET AND COMMUNICATE A NEW DEADLINE!
- Re-deploy your canvassers to follow-up.
- Ask to be part of the agenda of all key meetings. Report on progress to-date and stress the urgency of getting all pledge cards submitted by a certain date.
- Develop re-canvassing flyers. Distribute to all employees who have not yet returned their pledge cards and/or display in prominent spots throughout your workplace.

TIP: Retaining and increasing Donors: Whether or not people donate, aim for 100% return of pledge cards. This will make it easier for you to determine who still requires follow-up and may inspire some employees to make a small donation rather than return a blank card. This will avoid lost intended gifts and may uncover issues which can be resolved.

CAMPAIGN BEST PRACTICES...

Monitor Returns and Mid-Campaign Review

Monitor Returns

Don't wait until the end of the campaign to assess your returns! An important part of running your employee campaign is collecting information which will allow you to keep track of returns on an on-going basis. Before your campaign begins, take some time to establish a monitoring system. By using a monitoring system you will be able to track how many employees have been canvassed, how many pledge cards have been returned, how many are outstanding, how many previous donors have still not contributed, how many new donors have responded etc.

Mid-Campaign Review

The information you gather through your monitoring system, will also provide the basis for your Mid-Campaign Review. The Mid-Campaign Review may be held in the middle of your campaign to determine it's progress and if your team needs to make any changes to reach your goal:

Conducting your Mid-Campaign Review

1. Organize a meeting involving key members of your campaign team/United Way staff support.
2. Collect information from each area/department of your organization. The more specific your data, the easier it will be to identify problems and opportunities.
3. Gather additional data such as: comparisons to last year's campaign; recurring objections; issues that may arise; general spirit of the campaign and the responsiveness of donors.
4. Compare progress to your plan and timetable.
5. Identify strengths, problems and areas of opportunity.
6. Develop an action plan for the remainder of the Campaign.
7. Motivate volunteers.
8. Determine need for re-canvassing strategies.

CAMPAIGN BEST PRACTICES...

Special Events

Holding Special Events after your Employee Canvass

Special Events act as excellent compliments to your United Way campaign. They create excitement and awareness and can set the stage for a successful employee canvass. *Quality, not quantity, is what counts with special events.* Select events that have a proven track record that will attract as many employees as possible and that will be as cost-effective as possible in terms of the amount of time and energy required. United Way can assist you with a list of special event ideas.

TIP: Be sure that any major fundraising events are held after the employee canvass, so that individuals do not feel that the money they spend on various events replaces their pledge card donation.

Considerations for holding Special Events:

- What would we like to accomplish with this event? Raise money? Raise awareness? Boost employee morale?
- Have we tried this event in the past? Was it successful? How many employees participated? How much money did it raise?
- What is our financial goal for this event?
- How much time will be required to organize the event? What other resources are required, i.e. money, equipment, volunteers, etc.
- Who will organize the event?
- Where will the event be held?
- How will the event be publicized?
- Is special approval or a license required?
- Is a back-up plan or rain date required?



CAMPAIGN BEST PRACTICES...

Wrap-up, Recognition & Evaluation

Signal the end of your Campaign

Just as the beginning of your campaign was marked by a kick-off, the end should be signalled by a wrap-up. Your wrap-up should:

1. Announce the end of your campaign.
2. Communicate your campaign achievements (dollars, participation, etc.).
3. Thank donors and recognize your campaign volunteers.

You can mark the wrap-up of your campaign in a variety of ways. Here are a few suggestions:

- Hold a wrap-up meeting for all employees to announce results and thank participants. Arrange to have a cheque presented to United Way. Take a photo for your employee newsletter.
- Hold a wrap-up reception in a central location (if your workplace has multiple locations). If you have an executive boardroom or dining room which is not widely accessible to employees, try to hold the reception as a “perk”.
- Organize a wrap-up ceremony in your cafeteria/lunchroom during peak period. Invite all canvassers and senior management/union leadership. Distribute canvasser certificates at that time.
- Print up a special Campaign Newsletter to announce your results and recognize volunteers, sponsors etc. This is a great opportunity to include any photos taken during the course of the campaign.
- Distribute a token thank you “gift” (promotional item, donated goods, a flower, mint) to each employee along with a memo outlining your campaign achievements.

TIP: Retaining Donors: By thanking donors and letting them know how much their gifts were appreciated and how their donations were used, you will set the stage for future giving.

Evaluation

It is important to reflect on what worked and what didn't at the end of your campaign. Be sure to build an evaluation session into your campaign timetable for soon after your wrap-up. This will ensure that events are still fresh in your mind.

Invite your United Way Campaign Staff support to facilitate this session for you so you can be an active participant.

SPECIAL STRATEGIES

Retaining and Increasing Donors

One of the primary objectives of almost every employee campaign is to retain and increase donors. Here is a list of suggestions to help you accomplish this in your workplace:

Hold a Team Planning session: A Team Planning session facilitated by United Way will save you time and help you develop creative and effective strategies for retaining and increasing donors.

Recruit a Representative Campaign Committee: The people you recruit should reflect the general make-up of your organization, i.e. People from labour/management/support staff, people from each department/floor, people from various ethnic/cultural backgrounds etc. If you already have a committee, identify areas with potential for increasing donors and actively recruit a committee member from there to be part of your team.

Secure Visible Management Support: Ensure that representatives from senior management/labour leadership are present at all key meetings and events.

Ensure that Middle Management is on Side: Present the campaign plan at management meetings. Have your CEO issue a memo outlining how she/he plans to participate in the campaign and listing the ways that other members of the management team can get involved.

Set a Participation Goal and Declare it Publicly: You may even want to build it into your campaign theme. Alternatively you can publicize the number of donors you are aiming for.

Personalize all Pledge Cards: It is much more difficult to ignore a form that has your name on it than one that is generic.

Focus More on Pledge Card Canvassing: (particularly on leadership and payroll deduction) and less on special events.

Give Every Employee the Opportunity to Participate: Ensure that all employees are being asked for their support (i.e. Part-time, contract, unionized, management, support staff, shift workers, home-based workers, retirees, new hires, field employees etc.).

Improve Your Canvasser Training: Make sure you are sending out the most enthusiastic, well-prepared team possible. Insist all canvassers attend training and work with your United Way staff support.

SPECIAL STRATEGIES...

Retaining and Increasing Donors (cont'd.)

Face-To-Face Canvassing: People give to people, so make sure that employees are personally “asked” to support the campaign...either one-one-one by a canvasser or during the course of a group canvass meeting.

Focus on Retaining Donors: Let past donors know the impact of their donations. Make sure that people feel good about giving by thanking them for their gifts.

Regain Lapsed Donors: Identify employees who did not donate last year, but did contribute in the past. Approach them and find out why they didn’t contribute—it could be that they just weren’t asked.

Welcome New Donors: Develop a special “welcome program” for new donors. This could involve a special “thank you draw for first-time donors” a special thank you letter or a personal thank you from a long-time donor.

Ask for 100% Return of Pledge Cards: Request that all employees return their pledge cards whether or not they decide to donate. This will simplify tracking, help maintain confidentiality and likely result in some additional donations.

Offer Early Bird Incentive Prizes for donors who submit their pledge cards by a specified deadline. (One of the most popular incentives is a draw for time off work with pay).

Re-Canvass: If you don’t get the results you expected the first time around, then re-canvass employees using some of the techniques described in the Best Practices section of this guide.

Implement a Participation Challenge between departments, floors or locations within your organization, or challenge another organization within your industry/sector.

SPECIAL STRATEGIES...

Involving Management

Just as it is important to have ideas generated from the ground level up, it is essential to have **visible support** from your senior management team.

Getting involved in a United Way campaign is actually a terrific opportunity for management to interact with employees on “neutral” ground and to demonstrate their commitment to the community.

Here are some suggestions as to how you can effectively involve management in your campaign.

- Identify a “mentor” from the management team. This person could serve as your link with senior management and may even sit on your Campaign Committee. He/She could also be helpful in terms of conveying your campaign plans to the management team, canvassing, trouble-shooting and securing their support.
- Put United Way on the agenda of all senior management meetings. Request time on those agendas to share the campaign plan and to request appropriate release time, volunteers and other resources.
- Share all relevant campaign information with senior management, including your campaign plan, results of your Mid-Campaign Review and conclusions from your final evaluation.
- Run a Leadership Giving campaign prior to the general employee canvass. This will send a message to employees about the level of management support, and, hopefully inspire them to give generously as well.
- Invite senior management to all key presentations and events. Ask a member of senior management to speak briefly at every employee group presentation. Encourage him/her to state his/her personal reasons for supporting United Way of Peterborough & District, or simply ask for a general endorsement of the campaign.
- Ask senior management to play an active role in the campaign by supporting the volunteers in their individual areas and asking them for regular campaign updates, offering assistance and providing appropriate recognition.

SPECIAL STRATEGIES...

Involving Labour

Successful United Way campaigns involve people at every level of an organization including labour representatives. It is essential to have visible support from your local unions. It's a great opportunity for all employee groups to interact together and show support for the common cause of caring about the community. We know that by involving a cross-section of all employees within an organization, overall participation levels rise.

Suggestions of how Unions can help

- Include a Union Representative in the United Way Committee;
- Obtain a written endorsement from the Union President;
- Recruit effective Union canvassers.

In addition, Union Representatives are encouraged to:

- Show leadership by personally supporting the campaign and speaking at group meetings;
- Encourage and help plan proper recognition for their membership;
- Be knowledgeable about United Way of Peterborough & District member agencies and the services and programs they provide.

TIP: United Way of Peterborough & District can assist by having prominent local labour leaders meet to discuss the value of United Way with officers of the union in a workplace. Contact your United Way representative with any issues and concerns.

*We make a living by what we get,
but we make a life by what we give.*

- Sir Winston Churchill

SPECIAL STRATEGIES...

Leadership Giving

The Leadership Giving Program promotes and recognizes personal contributions of \$500 or more to United Way of Peterborough & District. Special recognition is given at five levels;

Friends- \$500 - \$999
Leaders - \$1000 - \$1,499
Builders - \$1500 - \$2499
Patrons - \$2500 - \$4999
Pathfinders - \$5,000 & over

In many organizations, the CEO appoints an individual, usually a member of senior management, to serve as the Leadership Chair. This individual co-ordinates a special approach to his/her colleagues which may involve a presentation by a senior United Way volunteer and requests for donations at the leadership level. The Leadership Giving Campaign should ideally take place a week prior to the general employee canvass.

The Leadership Chair canvasses current and potential leadership donor within the workplace. Ideally, this canvass should take place about one week prior to the general employee campaign in order to set the pace for employee giving and “lead” your campaign toward success. Your United Way of Peterborough & District Campaign staff support will work with the Leadership Chair to develop a campaign plan for leadership giving.

All Leadership Givers will receive special thank you from the United Way. Also, with their permission, their names will be included in the Annual Report

Organizations without Leadership Chairs

If your organization does not appoint a Leadership Chair, your United Way Campaign staff support can work with you to develop an appropriate approach for implementing a leadership campaign.

Why Run a Leadership Campaign?

- A Leadership Giving Campaign ensures that all members of the senior management team are canvassed for their donations.
- A Leadership Giving Campaign (especially one run in advance of the general employee canvass) demonstrates management support for the campaign.
- A successful Leadership Giving Campaign sets the pace for the employee canvass.

<p>TIP: Leadership Giving can not only increase the average gift within your organization, it can boost participation! Typically, senior executives are not canvassed effectively. Be sure that each member of the senior management team is asked to contribute and one-on-one follow-up occurs.</p>
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FINANCE AND ADMINISTRATION...

Employee Payroll Deduction Program

Payroll deduction is clearly the most convenient way to contribute to United Way. Payroll deduction benefits employees because it eliminates the expense of writing and mailing cheques to United Way and because it spreads their donations through the year. Payroll deduction also eliminates the need for costly direct billing by United Way and ensures that pledges are collected regularly and forwarded to recipient agencies on a timely basis.

It is very simple to set up a payroll deduction plan:

1. Ensure that the pledges of all employees who authorize payroll deductions are forwarded to your payroll department using the company's copies of the signed employee pledge cards.
2. Deductions normally start on January 1st of the next year.
3. For first time campaigns, you may offer this valuable service immediately and commence deductions on the next appropriate payroll, then conform to the January 1st payroll cycle in the next campaign.
4. Respond to any pledge and payment inquiries from United Way of Peterborough & District or its auditors.

Year-end Tax Receipts

Employees who donate by Payroll Deduction Plan will be receipted in one of two ways.

1. **For most employers:** The simplest way to provide a receipt for income tax purposes is to report each employee's total donations on his/her T4 slip at year-end. Most organizations' payroll systems can handle this very easily. United Way of Peterborough & District's charitable registration number is 105454482RR0001.
2. If your payroll system cannot report charitable donations on T4's, United Way will issue tax receipts after we have received your final payroll remittance for the year (typically in January of the following year). You will need to provide us with the name of each payroll donor and amount donated through payroll deduction for the year; we also need the total amount remitted by you to United Way of Peterborough & District for the year.

Tax receipts will be produced and mailed to your organization for internal distribution.

For further information, please contact the Director of Finance and Administration by phone (705) 742-8839, fax (705) 742-9186 or e-mail at office@uwpeterborough.ca

New Employees

Please offer a method by which new employees, who joined the organization after the annual fundraising campaign, can join the payroll deduction plan. The new pledge may be paid over the remaining months in the collection year in which the pledge is made.

Terminations

Please provide terminating employees with the opportunity to pay the remaining portion of their United Way pledge at the time of termination by submitting a cheque for the balance, payable directly to United Way of Peterborough & District. Or if the employee chooses, they may call United Way office to discuss their options.

FINANCE AND ADMINISTRATION...

Tax Benefits and Receipting

The Tax Benefits of Giving

While no one makes a donation simply to get an income tax benefit, the tax benefits make giving to United Way even easier. Proper planning can maximize these benefits, allowing donors to make the most of their generosity.

An individual who makes a gift to United Way receives a credit against income taxes. The annual federal tax credit is equal to 15% of the first \$200 donated by an individual and 29% on the amount exceeding \$200. Note that these percentages only reflect the federal tax credit. When combined with the impact of provincial taxes, the total tax credit on a donation of \$500 receives a tax credit of \$163.00 or 33% of the donation. Please note this information is current as of July 2008 but may change. We will provide updated information as it becomes available.

Gifts in Kind

Instead of giving cash, an individual may wish to donate capital property such as publicly traded securities, bonds, real estate or artwork. It has never been a better time to donate capital property to charity, especially if the property is eligible securities.

Many Ways to Help

As you can see there are many ways to give a helping hand. Those interested in alternate methods of giving, should contact a financial planner or a tax specialist to learn more about these strategies.

An Additional Benefit

At tax time each year, most people are faced with a number of tax receipts to track and compile. By consolidating their giving through United Way, they only have to keep and record one receipt for all of their charitable giving. If giving by payroll deduction this amount will be included on your T4 slip from your workplace.

“It is one of the beautiful compensations of this life that no one can sincerely try to help another without helping himself.”

-Ralph Waldo Emerson

FINANCE AND ADMINISTRATION...

How to Complete the Pledge Card

(Please note: Federal and Provincial government workplaces and centralized company campaign pledge cards may vary considerably from our locally provided forms.)

The United Way of Peterborough & District pledge card has 3 parts:

Top Copy	White	United Way copy, which must be returned in the campaign envelope.
Middle Copy	Yellow	Company Payroll copy, which is forwarded to your payroll department for donors selecting payroll deduction.
Bottom Copy	Pink	Donor copy, which is retained by the Donor as an acknowledgement.

1. Name/Address:

Please ensure that the donor's complete name and address is printed clearly in the appropriate areas.

2. Donation Information:

Total Donation : Indicate total amount of donation

3. Method of Payment :

Payroll Deduction: Ensure the donor indicates the amount per pay and the total amount he/she wishes to contribute by payroll deduction.

Cash: Staple the cash to the United Way copy (top) of the pledge card to prevent loss. Make sure the cash matches the amount indicated on the pledge card.

Cheque: Ensure the cheque is payable to United Way of Peterborough & District. Make sure the donor has signed the cheque and that it matches the amount indicated on the pledge card.

Post-dated Cheques: These are cheques with a future date. Ensure the cheques are payable to United Way of Peterborough & District. Make sure the donor has signed the cheque(s) and that they match the amount indicated on the pledge card.

Monthly Pre-authorized Chequing: Donors may authorize United Way to debit their bank account. A deduction of the amount chosen will be made on the 15th of each month from January to December. Ensure that the donor has enclosed a voided cheque and signed the pledge card.

Credit Card: Donors may authorize United Way to charge their VISA or MasterCard. Ensure that the donor includes the credit card number, expiry date and signs his/her signature on the pledge form. Donors may choose to make a one-time payment, or have their credit card debited by United Way of Peterborough & District monthly.

Note: Payments will begin approximately on January 15th of the upcoming year.

Signature and Date: Please ensure that the donor signs the form and dates it.

4. Leadership Information:

Leadership Donors should indicate whether they wish to be recognized in United Way of Peterborough & District printed material.

5. Giving Options:

Donors who want to designate their gift to a United Way of Peterborough & District funded agency, another United Way or to another Canadian charity, must complete the pledge card indicating the agency.

Campaign Envelope

Envelope Security Measures

In order to ensure that every donation reaches United Way of Peterborough & District safely, please follow the security measures outlined below:

1. Keep all completed pledge cards and payments in a secure place until they are submitted to United Way.
2. Even if your campaign runs over several weeks, please submit your campaign envelope at the end of your campaign. If you have special events monies on hand that you would prefer to turn into the United Way office during this time, please do so.
3. **Do not send cash through the mail.** Please deliver envelopes personally, by your company courier, or call United Way to arrange for pick-up.

Campaign Envelope Checklist

- Copies of United Way pledge form have been separated;
- Cash/cheque payments have been attached to corresponding top (white) copies of the pledge form;
- Each group of pledge forms is balanced and agrees with the amount recorded on the envelope;
- Adding machine tapes are enclosed;
- All cheques are payable to United Way of Peterborough & District;
- The number of donors is recorded on the front of the envelope;
- The person(s) who balanced the envelope and the person who picked it up/delivered it to United Way of Peterborough & District have all signed and initialled the envelope;
- Envelope face has been copied and retained for your records;
- Number of employees entered;
- Note any changes to address, phone numbers or contact names on the front of the envelope.
- If possible indicate what unions are involved in the Campaign and what total dollar value was contributed by union members. The Peterborough Labour Council has asked UW to track these donations.

APPENDICES...

Frequently Asked Questions

Why should I give to United Way...no one I know uses the services they support?

- Many people choose not to tell their family and friends they have needed and used United Way member agency programs and services. United Way touches 1 in 3 people in our community. With statistics like that it is likely that a family member, friend, neighbour or co-worker has or will benefit from United Way. The services we support range from mentoring programs for children, support services for seniors and those with special needs to food, housing and counselling (life skills, employment and financial).

United Way is just another layer of administration. Why wouldn't I just give directly to the service provider?

- United Way raises funds for 31 member agencies in the City of Peterborough and County supporting 91 directly funded programs. Without United Way you would have each of the agencies making individual approaches for funding, 31 agencies who would have to hire additional staff to fundraise in order to maintain their service level. This would divert their attention and resources from their primary mandate, which is to deliver services. United Way strives to ensure between 80% and 85% of donated funds reach the service providers in our community.

How do I know that the money I donate is going where it is most needed?

- Every year a volunteer group of interested citizens reviews the operations of the service providers funded by United Way to ensure the programs/services delivered are relevant to our community, are operated effectively and efficiently and makes recommendations to the United Way Board of Directors about appropriate funding levels.

Does United Way depend on government funding?

- No. However, some of the agencies United Way funds do receive government funding.

Speakers Bureau

United Way Speakers are available to go into your workplace to do presentations on a specific member agency and the work of United Way (UW). Typically a workplace presentation lasts no more than 15-20 minutes. A UW representative talks about the big UW picture for approx. 5 minutes. S/he briefly explains the programs delivered by UW as well as the range of programs delivered by member agencies. S/he also explains donor options. Then an agency speaker talks about their specific member agency and how donors' gifts make a difference to the people they serve for about 5 minutes. The employees are then offered the opportunity to ask questions about UW or the agency. In conclusion an optional 4 minute video can be shown. In most instances where a speaker presentation is possible, donor donations increase. These presentations help clarify the work of UW and its member agencies, eliminate barriers and misconceptions and put the human face on how donor dollars benefit our community. Presentations can be fitted to any available time schedule. Often the campaign coordinator (canvasser) will explain incentives offered in their campaign and ask the participants to fill in their pledge sheets at the conclusion of the presentation.

APPENDICES...

Sample United Way Speech

As an Employee Campaign Co-ordinator or Committee Member, you are an ambassador for United Way. If you are called upon to speak to a group of your co-workers about United Way, here is a basic outline that you can follow.

Introduce yourself: Explain your campaign role, i.e. ECC, Committee Member etc. .

Outline your speech: I.e. "I'm going to tell you a bit about United Way/about two of the 91 directly funded programs that United Way of Peterborough & District funds/why I support United Way; and how you too can make a difference in our community."

Provide a few key United Way facts: (See 'About United Way' in this guide) Base your choice of facts on your audience and your own preferences. For instance you may want to stress the following:

United Way raises money and allocates it to 31 social service agencies in the City and County of Peterborough supporting 91 directly funded programs. The money is raised with the help of volunteers, and volunteers also make the decision about which agencies are funded. Those of you who have donated to United Way last year can feel confident that every dollar you gave was treated with great care and allocated so that it would have maximum impact on the community.

United Way is a leader in cost-effective fundraising. United Way works hard to keep their fundraising and administration costs low by working through volunteers, obtaining sponsorship support or donated services from the corporate and small business community to offset costs. This ensures that 80-85% of donated dollars go directly to support programs and services in our Community. This federated campaign helps relieve United Way member agencies of the need to commit resources to fundraising and allows them to devote more time to providing service.

Without United Way you would have each of the agencies making individual approaches for funding, 31 agencies who would have to hire additional staff to fundraise in order to maintain their service level. This would divert their attention and resources from their primary mandate, which is to deliver services.

Talk about the agencies: Focus on personal success stories, talk about your experience touring an agency or, if appropriate, how you or someone you know, has been helped by a United Way funded agency. Ask your United Way staff support for examples.

Explain why donations are so urgently needed this year: i.e. government cut-backs at the same time community is growing quickly. The "need" has gone up but our society's capacity to meet the need is diminishing.

Ask people to help by making a pledge card donation: Stress the fact that every gift counts. Remind people that donations are tax deductible, and that there are a variety of ways to contribute, i.e. payroll deduction, credit cards, post-dated cheques, cash, etc..

Wrap up and thank your audience: Remind them that "Building Community, Changing Lives" is everyone's concern and that we need your help Right Here! Right Now...