

EMPLOYEE CAMPAIGN COORDINATOR

HANDBOOK



United Way of Peterborough & District

Change Starts Here!

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Welcome to the 2011 United Way Campaign Team!

As an Employee Campaign Co-ordinator or member of a Campaign Committee, you play a vital role in helping our community. The success of our annual fundraising campaign is due to the efforts of volunteers like you who take the lead in communicating the value and importance of United Way in over 400 workplaces throughout Peterborough City & County.

Last year, thanks to the collective efforts of hundreds of workplace volunteers, employees, businesses and organizations, employees contributed 53% of the \$2.475 million raised in 2010. The 2010 campaign total represents \$18.60 in per capita giving for Peterborough & District.

Your efforts ensure that United Way meets immediate human service needs by providing funding to 33 Member Agencies that deliver 152 programs within the City & County of Peterborough. The financial contributions United Way receives from employees like you, ensures that help and hope are possible for over 43,000 residents.

United Way is committed to making sure that every cent donated is well spent. United Way's Member Agencies are expected to meet strict guidelines and standards of operation and are reviewed on an annual basis to ensure that these conditions are satisfied. Funds raised are distributed through an extensive review process that ensures dollars are being allocated to the most pressing needs within our community. In 2010, United Way distributed 86% of the dollars received to support the work of its Member Agencies – **this means that for every dollar contributed only 14% is spent on fundraising costs! These are some of the lowest rates in the charitable sector.**

As the standard cost of living increases and people recover from the recession, the need for agency services increases. **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 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

We suggest that you contact your United Way Campaign Staff support at 705-742-8839 as soon as possible to determine how United Way can give you a “helping hand.”

Staff and Senior Volunteer List

Campaign 2011

Campaign Chair

David Wills

United Way Board Chair

David Martin

United Way Staff

Interim CEO

Janice Abbott

Director, Finance & Administration

Janice Abbott

Director, Resource Development

Lisa Kouri

Director, Organizational & Community Development

Lisa Smith

Resource Development Manager

Anne Driscoll

Co-ordinator Labour & Community Services

Paul Brown

Youth Leadership Co-ordinator

Laurie Newman

Executive Assistant

Kelly Countryman

Community Information Coordinator

Cheryl Ellis

Where to Find Us:

United Way of Peterborough & District

277 Stewart Street, Peterborough, ON K9J 3M8

Tel: (705) 742-8839

Fax: (705) 742-9186

E-mail: office@uwpeterborough.ca

Website: www.uwpeterborough.ca

Why Give to United Way

Our Mission

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

Our Vision

To achieve our mission, we aspire to:

- Energize and inspire people to make a difference
- Be credible and accountable in raising and distributing funds
- Provide meaningful opportunities for individuals to realize their potential by demonstrating volunteer leadership in service to this 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 these investments have recognizable impact

Objectives

- **Raise funds** through a unified campaign that maximizes financial resources available to enable Member Agencies **to improve our community's quality of life**
- **Allocate funds** to meet current and changing human care needs in the community
- **Promote co-operation and co-ordination** among human care organizations
- **Provide responsible stewardship** of resources to maximize community benefit from donor dollars
- **Take a leadership role** in enhancing this community's quality of life
- **Provide training** and consultative services to enhance the **leadership of non-profit voluntary organizations**
- **Communicate year-round** to enhance United Way's image in the community and increase awareness of United Way
- **Build 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

Why Give to United Way

Campaign Results

In 2010 United Way of Peterborough & District raised \$2.475 million for the community. This figure includes \$397,154 contributed by corporations, \$1,336,375 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 \$221,353. Individuals contributed \$520,841 directly to United Way.

Funded Agencies

United Way supports 33 Member Agencies and directly funds 152 programs touching the lives of 43,000 people living in the City and County of Peterborough. Through our Member Agencies, United Way is making a difference in the lives of people and in the life of our community. These agencies help to build this community's capacity to be healthy, strong, resilient, inclusive and supportive for all citizens. Our 2011 campaign brochure includes useful information regarding the powerful results of the work of our Member Agencies within the community. Your 2011 ECC Kit also includes success stories from our Member Agencies that speak to the individual impact of United Way dollars at work. Without United Way many of these valuable programs and services may not be available in our community.

Fund Distribution

Each year a panel of trained volunteers meets with the agencies funded by United Way to review their requests for funding. This is an extensive process that reviews both the accountability and governance of the organization and the validity of the request. United Way's fund distribution process incorporates the strategic directions adopted by United Way in order to reach its full potential in the community. Regarding its fund distribution process, United Way is committed to: ensuring donor dollars are invested in organizations and programs that address current and changing needs in the community; collaborating with the community to determine community needs and emerging priorities; focusing on the impact and results of United Way funded programs; and maintaining needed services in the community. Panel decisions and recommendations are reviewed by our Agency & Community Services Committee, who then seek final approval for use of funds from the United Way Board of Directors.

Campaign Goal

This year's goal will be set by our campaign volunteers in mid-August and announced at our Kick Off on September 15, 2011. It is essential that we grow our campaign dramatically to meet the increasing pressure being placed on agency resources. To meet the growing need for agency services, funding allocations were increased by 6.4% in 2009 and 8.9% in 2010.

Why Give to United Way

United Way brings communities together – business, labour, governments, voluntary sector organizations and residents – to improve individual lives and our collective living conditions. No other organization supports such a broad range of programs, services and community agencies.

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

By giving to United Way, you chose to pool your contribution with thousands of others so that United Way can make significant financial investments in solutions that get results. Other benefits of giving to United Way include:

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 33 organizations and 152 programs and services. 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 dollars are invested only in organizations that meet stringent guidelines and expectations regarding organizational operation and financial management. Agencies are reviewed annually to ensure that they continue to meet these conditions. You can depend on the quality of United Way funded agencies!

Donating to United Way is convenient. You can donate online at www.uwpeterborough.ca, by payroll deduction, pre-authorized cheque, 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.

Member Agencies can focus on people – not fundraising. By saving Member Agencies the cost of fundraising and issuing receipts, they can focus more of their resources where they are needed the most.

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

Why Give to United Way

United Way agencies give people a “hand up”. Your donation to United Way reaches 33 local social service agencies that provide essential services to children, youth, seniors, women, men, families, and people with illnesses or special needs. These agencies help prevent social problems and improve people’s lives.

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.
- **Provide youth with the opportunity to grow healthy minds and bodies**
Participation in skill-training activities, peer groups, and counselling helps our young people grow into self-sufficient, productive individuals and decreases 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**
Your donation helps older, often isolated, people maintain their quality of life and remain in their own home through programs like telephone reassurance checks, respite care, friendly visiting, and transportation to medical appointments.
- **Assist adults and families in crisis**
Ensure emergency or on-going 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 provide supports such as employment, education and skills development.
- **Help families become stable and self-sufficient**
Help people living on low incomes help themselves through literacy programs, self-employment strategies, skills training, job search techniques and life skills training. 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.

We Are More Than Just Fundraising. We Build Community.

United Way of Peterborough & District is more than just a fundraising organization. We are an award winning, national leader within the United Way of Canada movement. We are the only United Way in Canada who has twice won a National Award in project development and community collaboration. We are considered a model United Way in terms of project delivery and leading community betterment projects.

Homelessness Partnering Strategy (HPS)

We are the Community Entity for the federal government's HPS initiative, mandated to oversee the HPS project in the City and County of Peterborough. In 2010, the Canadian Mental Health Association Peterborough led a collaboration of community partners including VON, Peterborough Social Planning Council, and Peterborough County-City Health Unit to provide support to the most difficult to serve homeless people within our community. The collaborative provided services designed to move people off the streets and out of on-going use of emergency housing to more stable permanent housing. Goals of the program include obtaining housing for people who are homeless, obtaining income support for people who are homeless and assist homeless people pursue employment, volunteer and educational opportunities as appropriate. To support these goals, HPS funding provides outreach workers who support clients, trustee services to assist with money management, and primary care through a nurse practitioner working with VON.

Training and Consulting Services

In 2010, we hosted 34 community-based, affordable workshops that trained 461 non-profit staff and volunteers in effective governance and organizational management practices. In addition, 68 not-for-profit organizations received direct consultation support and 12 organizations received special facilitation services such as mediation, strategic planning, and organizational needs assessments. Our local Training and Consulting Services program is considered a national leader in training and supporting the non-profit sector. These services help keep our local voluntary sector healthy and sustainable, enabling them to improve their programs and services.

Outcome Measurement

Our Outcome Measurement process is nationally recognized and earned us the Chair's Award of Distinction for Collaboration at the 2009 United Way of Canada National Conference. Our Outcome Measurement process is the national standard in outcome evaluation and we continue to train and support other United Ways across Canada on how to measure the human impact of the programs they fund.

Labour Community Services

Since 1995, as part of our partnership with labour, we have provided training and support for Union/Peer Counsellors, workers who are employed in workplaces throughout Peterborough City and County. Certified by Canadian Labour Congress, Union/Peer Counsellors offer guidance, referral services and community information to co-workers in need. Union/Peer Counsellor interventions are proven to reduce individual suffering and hardship and therefore also help with employee productivity.

We Are More Than Just Fundraising. We Build Community.

United Youth

Our youth programs are widely known and embraced by our community. In its 8th year, Backpacks for Kids distributed 1138 backpacks filled with essential school supplies to children in the City and County. Also in 2010, 1600 pieces of winter wear were distributed through Coats for Kids with 300 pieces of winter wear being distributed at our three rural distribution sites in Buckhorn, Havelock and Apsley. United Way of Peterborough & District's Youth Advisory Council continues to be an active component of our youth relations strategy. It is comprised of youth aged 14-19 who want to be involved with United Way and our youth-focused projects including Coats for Kids, Backpacks for Kids, Youth Grants, and G.I.V.E. (Get Inspired for Volunteer Experience).

Community Information Services

Since 2003, we have partnered with the City and County to provide community information and referral services. In 2010, more than 723 individual calls for help were referred to appropriate local services. In addition, we maintain the Peterborough County portion of www.fourinfo.com, the most extensive and widely searched online database of community information and volunteer opportunities for Peterborough city and county. In 2010 there were 593,425 searches for community information and 64,192 searches for volunteer opportunities on fourinfo.com. United Way of Peterborough & District is responsible for the collection of local data used by 211. This partnership ensures that information used by 211 accurately reflects the availability of local services.

Emergency Volunteer Registry (EVR)

The EVR is a unique project created by United Way of Peterborough & District to actively recruit volunteers and community partners in preparation for natural disasters or human health care emergencies that may affect Peterborough City and County. United Way staff are active members of the Peterborough Interagency Pandemic Influenza Planning Team (PIPIT) and Community Support Agencies for Emergency Planning committee.

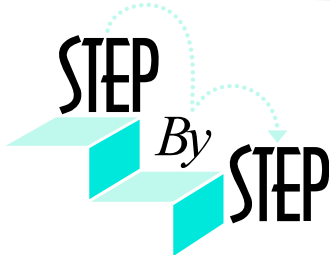
Certificate in Not-For-Profit Leadership

Since its inception in 2008, 28 students have studied fundamentals, best practices and current trends of non-profit management through an online certificate in Not-For-Profit Leadership developed by us in partnership with Fleming College. The curriculum uses practical education, training, peer collaboration, case studies, and organizational audits to educate new or aspiring executives, managers, and members of boards to effectively lead their organizations. This certificate is the only one of its kind offered online through the Ontario College system.

Food For Kids Peterborough

United Way continues its partnership with Food For Kids Peterborough to oversee an Ontario Trillium Foundation grant to expand and strengthen local student nutrition programs. This joint project is designed to build the existing volunteer base of Food For Kids by providing professional level volunteer recruitment, recognition, and retention services. By the end of the project, 180 new volunteers will support the program and contribute 3,600 volunteer hours to ensure access to healthy food before, during, or after school for local students in the City and County of Peterborough.

Campaign 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!

- 1. Learn about United Way of Peterborough & District**
 - Learn 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 and 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

Build Your Campaign Team

Obtain Support from Senior Management and, where appropriate, Union Leadership

The successful campaign needs endorsement and **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 mix 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.

Build Your Campaign 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 member 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-to-one ask for a donation is the single most effective fundraising method.

Analyze and Develop an Action Plan

Review Past Campaign Results

Before you begin to plan your campaign, analyze 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 Coordinator.

Try to determine the following:

- What were the strengths and weaknesses of last year's campaign? What about other previous campaigns?
- How much money was raised last year?
- What do we want to raise this year?
- What was our participation rate last year?
- How many people participated via the pledge cards?
- How many people used payroll deduction? Cheque? Cash? Visa?
- What was the average gift given?
- How many leadership donors (\$500+) are in our workplace?
- How were new donors attained?
- Was canvassing effective? If not, why?
- Were special events effective? If not, why?
- How many people will be canvassed by each volunteer?
- What support/involvement did we have from management/union in the campaign?
- Any 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!

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 \$104 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.

Workplace Campaign 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 a fund raiser.**

Here are a few ideas that have been successful. Talk to your United Way volunteers and/or 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 our Speakers Bureau program to present on the life changing impact of United Way and its’ Member Agencies 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.

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. Make sure 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
- Consider a retiree canvass. Many times retirees have been long time United Way supporters
- Incorporate, if possible, group and one-on-one **FACE-TO-FACE** canvassing.
- Canvass employees in their preferred language
- Have an 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 the 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

We believe that charitable giving is a personal decision. However, during the course of the campaign, you could be asked "How much should I give?" Here are a few options you may want to consider when answering the question:

Some common giving guidelines are:

- **15 minutes per pay** contributed bi-weekly
- **One day's pay** per year

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, week, etc. to United Way.

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 to 30 minutes

Canvassing Methods

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.

<p>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.</p>

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 its 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 and your United Way staff support person.
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 your progress to your established 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.

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. Special Event Ideas are listed on our website at www.uwpeterborough.ca.

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?

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:

- Announce the end of your campaign
- Communicate your campaign achievements (dollars, participation, etc.)
- 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 there 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 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) 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 for Retaining & 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, each department/floor, various ethnic/cultural backgrounds, etc. If you already have a committee, identify areas with potential for increasing donors and actively recruit a committee member to ensure representation from all areas.

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.

Retaining & Increasing Donors

Face-To-Face Canvassing: People give to people, so make sure that employees are personally “asked” to support the campaign - either one-to-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: This is a great incentive for donors to 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.

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** (see page 25) 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.

Involving Unions in Unionized Workplaces

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.

How Unions Can Help

- Include a Union Representative on your United Way Committee
- Obtain a written endorsement from the Union President
- Recruit effective Union canvassers

In addition, ask Union Representatives 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.

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	\$1,000 - \$1,499
Builders	\$1,500 - \$2,499
Patrons	\$2,500 - \$4,999
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 donors 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 Donors will be recognized and with their permission, their names will be included in the United Way 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 & Administration

Employee Payroll Deduction

Payroll deduction is the most convenient way to contribute to United Way. Payroll deduction benefits employees because it eliminates the expense of writing and mailing cheques and it spreads their donations through the year. Payroll deduction also ensures that pledges are collected regularly and forwarded to Member Agencies on a timely basis.

It is very simple to set up a payroll deduction plan

1. Forward pledges from all employees who have authorized payroll deduction to your payroll department using the company's copy of employee pledge cards.
2. Deductions normally start on January 1st of the next year. However, for a first time campaign, you may want to commence deductions immediately on the next appropriate payroll. You will need to confirm with your payroll department if this is possible.

Year-End Tax Receipts

Employees who donate by payroll deduction will be receipted on their 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.

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 authorizing payroll to deduct the funds from their final pay. The employee may also wish to submit a cheque for the balance, payable directly to United Way of Peterborough & District. If the employee chooses, they may call United Way office to discuss their options.

Tax Benefits & 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 \$160.58 or 32% of the donation. Please note this information is current as of August 2011 but may change. We will provide updated information as it becomes available.

Gifts of Securities

Instead of giving cash, an individual may wish to donate capital property such as publicly traded securities or bonds. Employees should discuss this option with their financial advisor.

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 from your workplace.

How to Complete the Pledge Card & Secure the Campaign Envelope

Please Note: Federal and Provincial government workplaces and centralized company campaign pledge cards may vary considerably from our locally provided forms. As well, some workplaces may be completing pledge cards online.

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, and signs pledge card.

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: Ensure post-dated 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.

How to Complete the Pledge Card & Secure the Campaign Envelope

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 on a quarterly basis or other preferred time frame.

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 print material.

5. Giving Options:

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

Securing the Campaign Envelope

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.

How to Complete the Pledge Card & Secure the Campaign Envelope

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

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 33 Member Agencies in the City and County of Peterborough by directly supporting 152 programs. Without United Way, each agency would have to make an individual approach for funding, requiring those 33 agencies to hire additional staff to fundraise in order to maintain their levels of service. This would divert attention and resources away from the primary mandate of the organization. United Way strives to ensure that 80% to 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 United Way Member Agencies are reviewed to ensure that they meet strict guidelines and operating standards set by the United Way, Canada Revenue Agency, and the Province of Ontario. Funding requests submitted to United Way are also thoroughly reviewed to ensure that the programs delivered are relevant to our community and that dollars invested create measureable change within the lives of clients.

Does United Way depend on government funding?

No. However, most of our Member Agencies do receive government funding.

Appendices: Helpful Hints to prepare your Speech

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’m going to tell you a bit about United Way/about two of the 152 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.

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 community’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: Conclude by reminding the audience of how United Way meets its 2011 Campaign slogan of “Change Starts Here”.

Speakers Bureau

United Way Speakers are available to visit your workplace to highlight how member agencies and donor gifts have made a difference in their personal circumstances or that of agency clients as a whole. Typically a workplace presentation lasts no more than 15 to 20 minutes. A United Way representative will also accompany the speaker to discuss the overall United Way picture including the programs directly delivered by United Way, the range of programs delivered by Member Agencies, and donor options. Employees are offered an opportunity to ask questions about United Way and the agency. Hosting a speaker presentation, consistently results in an increase in donations to the United Way. Presentations put a human face to how donor dollars benefit our community. Presentations can be fitted to any available time schedule.