



United Way
Peterborough & District
uw peterborough.ca



75 Years of Caring

Employee Campaign Co-ordinator Guidebook

2016 Campaign

Welcome to our campaign!

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75 Years of Caring

Our community impact

We are committed to this community and have developed an investment strategy focussed on innovative solutions to critical challenges facing vulnerable people in our community aligning to two main priority areas:

Moving People from Poverty to Possibility

Building Healthy & Strong Communities

From Poverty to Possibility

Our focus includes meeting the basic needs of the most vulnerable people in our community and building the capacity of individuals to engage in employment, education, and/or skills training opportunities.

We reduce poverty by creating opportunities people need to build resiliency and shift from poverty to possibility.



Building Strong & Healthy Communities

Supporting the overall well-being of individuals and families is vital to building a strong & healthy community. Eliminating barriers and creating access to services allows people to contribute to community and develop a sense of belonging.

We are strengthening Peterborough city & county by developing strong people to build thriving communities.



United Way Peterborough & District is working every day to create opportunities for a better life for everyone. We do this by supporting a network of social services and programs that focus on the following areas seeking to build a healthy and inclusive community.

From Poverty to Possibility

Partner Agencies: **16**
Innovation Projects: **4**
Number of People Supported: **35,801**

The Issues:

- **47%** of workers in Peterborough have literacy skills below the level required for their job
- **57%** of workers have incomes that fall below the level necessary to afford basic everyday expenses and have a decent quality of life
- **5,800** Peterborough households regularly experience a shortage of nutritious, quality food

Your United Way Responds:

- **2,278** people received debt management and financial literacy training to better manage personal finances and build assets
- **3,350** receive job training and develop life skills to improve their personal and vocational success
- **72,489** meals provided to ensure that safe, affordable, and nutritious food is available to alleviate the effects of hunger

Impact:

87% of those trained in financial literacy improved their ability to manage personal finances and avoid financial crisis.

60% of participants who took part in a United Way funded job training program secured meaningful and fulfilling employment.

Building Healthy & Strong Communities

Partner Agencies: **14**
Innovation Projects: **1**
Number of People Supported: **24,768**

The Issues:

- **26,616** Peterborough residents will deal with or be affected by some kind of mental illness in their lifetime
- **29.3%** of people in Peterborough find their participation in community life and activities is sometimes or often limited
- **1 in 2** girls and **1 in 5** boys will experience sexual violence at some time in their lives

Your United Way Responds:

- **11,347** people coping with a mental illness received counselling to increase their skills related to emotional regulation and distress
- **14,130** people were provided with settlement services and enhanced opportunities to build and participate in a safe and inclusive community where all voices are valued
- **9,100** survivors of violence and trauma received emergency crisis intervention, safety, and recovery treatment to rebuild their lives

Impact:

73% of youth taking part in positive relationship and body image programs improved their self-confidence.

100 activities assist **450** newcomers to settle successfully in our community.

*The statistics contained are drawn from local and national data sources, as well as information provided by our Partner Agencies.

Investing for Impact

When you invest in the work of United Way you invest in our community. We take great pride in providing stewardship excellence, promising to:

- undertake an intensive funding application and review process ensuring funded agencies meet the highest standards in operational and management effectiveness,
- take responsibility ensuring your contribution is invested in the most effective and efficient way,
- monitor and report the performance and measure the impact of your community investments.

Guiding Principles for Your Investment: United Way has identified 5 principles to guide all our investment activities. Our funded agencies are required to align to the following principles;

1. **Inclusive:** Agencies provide personalized service to clients enabling them to effectively navigate the social service system.
2. **Collaborative:** Agencies actively seek out and participate in opportunities for cross-agency communication and partnership to strengthen the community and the sector.
3. **Responsive:** Agencies demonstrate a commitment to continuous learning, applying insights and practices to best respond to client needs.
4. **Family-Centred:** Agencies place families at the centre of service delivery, with the aim of building stability and resilience within caregiver relationships.
5. **Balanced:** Agencies demonstrate a commitment to providing services that balance intervention and prevention strategies.

Investing Your Dollars

Our intent is to be focused in our funding and to fund deeply over time. Our belief is this approach has the best chance of realizing impact in our community. Our funding model features three distinct funding streams;

- **Long Term Fund:** core funding over 3 to 5 years (75% of community investment dollars)
- **Innovation Fund:** shorter term funding over 1 to 2 years (20% of community investment dollars)
- **Neighbourhood Fund:** short term local funding (5% of community investment dollars)

Investing With a Comprehensive Application and Review Process

A Letter of Intent (LOI) phase is the first step in our community investment process with the intention to allow potential applicants to demonstrate how their organization, collaborative, or initiative offers the most promise to achieve UWP's community impact priorities and outcomes. This year, we received a total of 60 LOI submissions from 39 different agencies for our two primary investment streams – the Long Term Priority Fund and Innovation Fund.

A Community Review Team then develops recommendations based on an in-depth and consensus-based group discussion process. The most promising submissions are invited to submit a full funding application. This year, 19 agencies moved forward to submit full funding applications under the Long Term Priority Fund and 5 agencies moved forward to submit full funding applications under the Innovation Fund. All LOI recommendations are then reviewed by United Way's Agency & Community Services Committee with final approval from the Board of Directors. To be eligible to apply for UWP funding, LOI submissions have to pass three levels of review and consideration.

During the second phase of the community investment process, UWP staff complete a preliminary review of all applications to identify any issues/questions. A funding review team scores each application and recommendations are developed through extensive group discussion. The level of recommended funding is established by the review team based on merit, application quality, and fit to UWP's Community Investment model. All investment recommendations are further reviewed by

United Way's Agency & community Services Committee with final approval from the Board of Directors. The following agencies in receipt of UWP funding pass three levels of review and consideration.

United Way's Long-Term Priority Funding

This United Way Peterborough investment stream is used to stabilize agencies that align to the community priorities and outcomes identified by United Way. Agencies receive funding for up to 5 years and are expected to meet the highest standards in organizational accountability. Close to 75% of our community fund is used to support long-term investment.

- Big Brothers & Big Sisters: \$72,675
- CMHA: \$36,338
- COIN: \$36,338
- Community Care Peterborough: \$52,488
- Community Counselling & Resource Center: \$72,675
- Community Living Peterborough: \$38,760
- Elizabeth Fry Society: \$48,450
- John Howard Society: \$48,450
- Kawartha Sexual Assault Centre: \$34,723
- New Canadians Center: \$52,488
- PARN: \$31,493
- Peterborough Community Chaplaincy: \$44,413
- PCCHU (Food for Kids): \$10,000
- Peterborough Family Resource Centre: \$48,450
- Peterborough Youth Services: \$41,990
- Trent Valley Literacy Association: \$24,225
- YES Shelter for Youth and Families: \$56,525
- YWCA: \$72,675

United Way's Innovation Funding

Through our Innovation Fund, United Way supports non-profit innovators, whether small or large, to design and/or deliver new initiatives that meet identified emerging social issues. Innovation Funding is one-time funding provided for up to 2 years to an individual charitable organization for their own initiative or to serve as the lead on a multi-agency initiative. 20% of our community fund will be allocated to supporting innovation in the non-profit sector.

Previously Funded Projects:

COIN – Work-Life: \$19,800

The goal of Work-Life is to support better outcomes for discouraged workers, test new ideas and approaches, and develop project partners' capacity and resources to be able to offer proven interventions to discouraged workers.

Fourcast – Changing the Conversation: \$46,000

Changing the conversation seeks to improve the way addiction and mental health providers interact and respond to those with a substance use or mental health concern regardless of organizational mandates.

Kawartha World Issues Centre – Making TRACKS: \$47,000

TRACKS seeks to reduce school drop-out rates among Aboriginal youth by offering cultural curriculum that reflects the values of Indigenous communities promoting an environment of respect and inclusion that could ultimately address bigger issues including inactivity, youth violence, and self-harm.

Kinark – Family Support Provision: \$45,000

Family Support Provision connects families whose children are accessing mental health services to resources that help parents/caregivers and siblings feel supported and build coping skills. The FSP acts as both mentor and advocate, working with mental health systems to alleviate the sense of chaos a family may be experiencing.

YES Shelter for Youth and Families – Family Reconnect: \$13,000

The goal of the Family Reconnect Project is to reduce youth homelessness by enhancing family functioning, improving communication skills and supporting the development of positive family culture.

United Way's Neighbourhood Funding

United Way wants to make neighbourhoods safe and strong across our community. Our focus is to support neighbourhood vitality through strong resident engagement and local leadership to achieve positive change. This fund supports grassroots neighbourhood and resident initiatives. Our intention is to allocate 5% (\$10,000) of our community fund to this important work.

Where your dollars go...

79 cents of every dollar raised
by United Way is invested in our community.



5% Social sector and government-level change.

3% Directed by donors to charities of their choice.

3% Multi-partner collaborations

68% Agency programs and building capacity of our partners.



United Way
Peterborough & District

79%



13%

United Way makes a lasting impact by investing in collaboration, change initiatives and partner agencies.

Fundraising costs

Management & Administrative costs

Real People, Real Possibility: Andrew and Stephen Jaikaran



Life is complicated – for the family living in poverty, the child struggling in school. Or the person living with a mental illness – there is often no single way to move forward. Which is why when you give to United Way, you're working with us to invest in programs with a wide range of impacts on local people and local lives. Stephen and Andrew Jaikaran are no exception. We are so thrilled to have them share their story with you.

Andrew was diagnosed with autism spectrum disorder at age two. A year and a half later his parents were informed there was a 50 percent chance he would never speak and due to his disability he may never live independently. Now 22 years old, Andrew has a job, his G1 driver's license, and plans to attend Fleming College.

"It is important to have good friends, independence, a strong voice, and to be at peace with yourself and the world," he explains. "I'm looking forward to getting my G2 license and will ride the city buses until then."

Stephen talked to us about his struggle to raise a special-needs son made easier through United Way funded programs. "You have helped a person, a family, a community" he said. "I don't know how to thank you, but I'm glad I got the chance to say it."

Point In Time

Count Peterborough

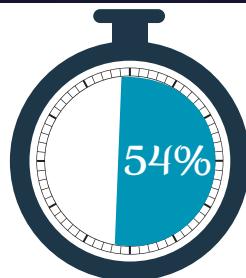
At least

120 people



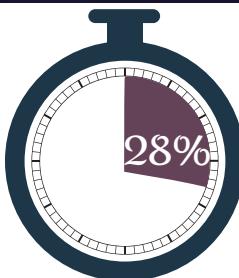
were experiencing homelessness in Peterborough

March 22, 2016



Chronically
Homeless

have spent 6 months or more homeless in the past year



Episodically
Homeless

have been homeless 3 or more times in the past year



A Total of

15,461
combined days

were spent homeless by participants within the past 12 months, totalling 42 years



20%

Have attended Post Secondary School



23%

Of participants identified as Aboriginal



64%

Experienced homelessness before the age of 26 years old



98%

Have a source of Income

"Everyone has a right for somewhere to live,"
Survey Participant

Top 3 Reasons for Homelessness Among Participants



Family Breakdown
33



Addiction/
Mental Health
23



Unsafe Housing
20

Point in Time Count

Peterborough

On March 22, 2016, 46 volunteers including 13 team leaders conducted a homelessness count in Peterborough over the course of 14 hours...



255

people were approached

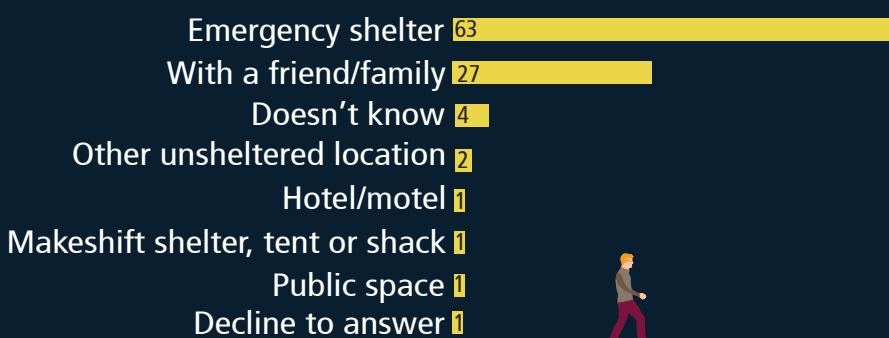
100

surveys were completed

100%

everyone reported wanting housing

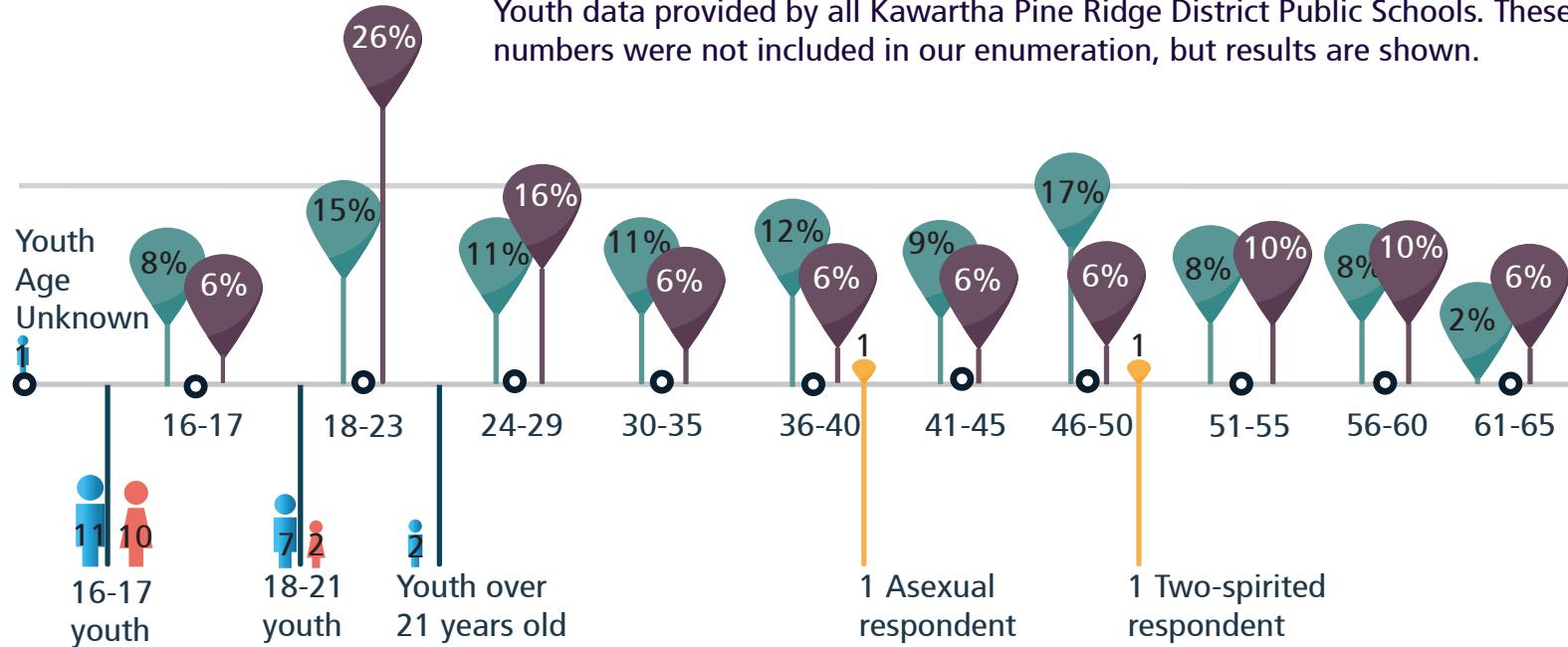
Where are you sleeping tonight?



Age and Gender

Young Female Young Male Male Female Asexual/Two-spirited

Youth data provided by all Kawartha Pine Ridge District Public Schools. These numbers were not included in our enumeration, but results are shown.



View the full 2016 Point-in-Time Count report on line at uw peterborough.ca



Your role as Employee Campaign Co-ordinator (ECC)

Welcome to the team! We are so thrilled to have you be a part of United Way Peterborough & District's **75th Campaign!**

ECCs are an integral part of the United Way Campaign. You are the go-to person. The one who assembles a team, creates a plan, and acts as an 'ambassador' for United Way. We would like to take a moment to thank you for the job you are about to do.

As an ECC your responsibilities include:

1. Learn about United Way Peterborough & District
 - Learn about the local impact
 - Arming yourself with stats and facts will help you feel more prepared to lead this campaign!
2. Build your team
 - Secure support from management/head office/labour if unionized
 - Recruit your friends and co-workers to help canvas and plan events
3. Analyze, develop an Action Plan, and goal set!
 - Review past campaign results if possible
 - Hold a planning session – UWP Staff members would be happy to help!
 - Set a goal
 - Develop an action plan
4. Kick off and Canvass
 - Book end your campaign with a clear kick off and celebration – Invite us!
 - Canvass employees for their donations
 - Mid-Campaign Review
 - Re-canvass if necessary
5. Hold Special Events
 - Boost morale and have some fun by holding special events – only AFTER pledge form canvassing
 - Invite your UW representative, we like having fun too!
6. Wrap-up, Recognition and Evaluation
 - Celebrate your results!
 - Thank everyone
 - Reflect on the strengths and challenges from the campaign and identify opportunities for next year

Build your team

Obtain Support from Management

Successful workplace campaigns need a strong endorsement from management and labour (where applicable). By agreeing to a campaign, your CEO/senior manager/union leader has already indicated an interest in supporting United Way Oxford and our community. Encourage them to take an active and visible role in your workplace campaign. Some examples may include:

- Sending a personalized message to each employee encouraging participation
- Attending and/or speaking at your events such as launch
- Approving the necessary time needed to plan and implement your campaign

Recruit a campaign team and canvassers

Start this process early. Forming a committee with a blend of new and returning members will encourage new ideas while maintaining continuity. The size of your organization will determine how many members your committee will need and what their individual functions will be.

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.

Canvassers

While the Campaign Committee helps develop a plan and strategies, the canvassers are the actual front line volunteers. An ideal number of canvassers would be 1 canvasser per 10 co-workers. Canvassers should be familiar with the work of UWP and have access to materials and stats to answer questions to help ensure co-workers are making an informed decision about their charitable giving.

Effective canvassing begins with the selection of reliable, enthusiastic volunteers. Emphasize how much their involvement would mean to you, UWP and their community. Tell them why you think they are the best person for the job. Canvassers should be:

- Representative of your workplace to facilitate peer to peer canvassing
- Able to ask for a donation without being self-conscious



Analyze, develop an Action Plan, and goal set!

Review past Campaign Results

Begin your analysis by gathering information of previous campaigns. UWP can help with this. Identify the strengths and weaknesses while identifying possible opportunities.

- How many people participated
- What was the average gift
- How much money was raised
- Was canvassing effective – can it be improved?
- Were special events effective?
- Major recommendations for the upcoming campaign

Once you have answered these questions, you are ready to develop your own action plan!

Goal Setting

Establishing a clear goal is one of the most important best practices in any fundraising plan. 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.

Goals don't always have to be purely total amount raised. Consider the following types of goals:

- Increasing participation rate
- Increasing average gift
- Increase number of leadership gifts (\$1,200+)
- Increase number of Everyday Heroes (\$1/day)



Once a goal is decided on, publicly announce it and ensure progress is communicated via email, thermometers and posters. Visualization of the goal will help co-workers take ownership of it.

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.

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.

Kick off and Canvas

Kick Off

It is very important that every United Way campaign have a definite beginning and an end. Kick off can be an event, a publicity blitz, or simply something fun and out of the ordinary that signals the start of your campaign. Remember the kick off should be an awareness event, not a fundraiser. It can jeopardize the results of your campaign if it is used as a fundraiser.

Here are a few ideas that have been successful:

- 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.
- 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 throughout your organization.
- 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 is well-publicized and appeals to a broad range of your employees.

Canvassing

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 and followed up with!

Canvassing should have a definite time frame with a fairly short turnaround (1-2 weeks) and should take place before any special events. Having a strong reporting and monitoring system in place will help you track your progress and allow you time for planning a re-canvass if goals are not met.

Types of Asks

Make your own donation first – it is much easier to ask others to give when you have done so yourself! Begin by canvassing people you know, it is a great way to get comfortable with the ask and build your confidence.

Here are approaches for canvassing:

One to One

A canvasser personally connects with a fellow employee. When employees are asked to contribute by a peer, it is more meaningful. Peer canvassing is advisable at every level of the organization and is preferable where employees are spread over a large area and it is difficult to get everyone together.

Group

Pledge forms are distributed following a presentation, an effective and efficient method, ensuring everyone receives the same message. Your canvasser team still has a one-to-one role to play in these situations by encouraging employees to attend all presentations and following up with those who were not present.

Combination

Similar to a group canvass, a presentation is held but pledge forms are not distributed, allowing Canvassers to perform a one-to-one follow-up with each employee. Canvassing should be done immediately following the presentation.

Mail

Pledge forms are distributed by mail. While the personal approach is the most effective method of canvassing, certain work situations (i.e. field workers and retirees) necessitate the use of a mail approach to effectively reach all employees. Experience shows that the most effective mail solicitations are conducted as a separate communication and not included in pay envelopes. Many campaigns incorporate a personal phone call to follow-up on outstanding donations.

The number one reason people do not give is that they were not asked! Make sure every employee was asked to participate, face to face when possible.

Special Events

Special events create excitement and awareness for your campaign. They are a good complement to your campaign but should never be a replacement for pledge form canvassing.

Some things to consider when planning a special event:

- 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?

Special events should take place after the initial employee canvass because small donations at a Special Event (a \$2 cookie at a bake sale) should not replace pledge form donations (\$2/pay).



Special Events – putting the fun in *fundraising*

Special Events are a fantastic way to create awareness, infuse your workplace with energy, and boost employee morale. They certainly can raise money, but the real value in special events is the excitement and momentum they create for your annual United Way workplace campaign.

There are hundreds of innovative ways to raise awareness and create excitement about the United Way campaign. We've listed a handful of proven special events that you might consider:

Agency Speaker	Arrange for a member of United Way's Speakers' Bureau to attend a departmental meeting or coffee break. Most presentations take about 10 minutes and it's a great way to learn about our community.
Agency Tours	Arrange for your workplace committee, canvassers or small groups of employees to tour United Way agency partners see first-hand the work they do in our community. Tours take as little as 30 minutes.
Auctions (Services)	Auction your employees' special talents as prizes. Guitar lessons, cook dinner, valet parking, or buying & delivering coffee everyday for a week for example.
Auctions (Silent/Live or Email)	Employees and/or departments can donate baskets or prizes to the auction. Employees write their bid on a bidding sheet (Silent/email), or have a Guest Auctioneer and use paddles to bid (Live).
Bake / Book / Garage Sale	Always fun to shop! All proceeds donated to United Way.
BBQ Lunch or Breakfast	Executive Chefs serve breakfast or lunch to kick off your campaign. Arrange for someone from United Way to come and join in the fun.
Bowling	At the end of the hall or playing the real thing.
Carnival / Mardi Gras /Vegas	Employees pay to play a variety of games and/or they can win "starter" chips with every \$5, \$10, etc. pledge made.
Car Race / Horserace	Build a large display of a racetrack with cars or horses representing each department. Cars/horses will advance around the track as dollars and/or participation rates increase in each department.
Car Wash	Executives and volunteers wash cars in the company parking lot over the lunch hour to maximize employee participation. Charge a flat minimal fee.
Casual / Jean Days	Charge a donation fee to wear jeans on Friday or free when you return your pledge form. "I'm Dressed This Way for United Way" stickers easily identify participants.
Celebration	Hold a Celebration at the end of your campaign to thank all your volunteers and donors and celebrate your success!
Chili Cook-off	Co-workers compete for bragging rights for the best chili! Charge a small fee per bowl and include rolls for lunch.
Coffee Cart	Executives and/or Canvassers hand out free coffee and/or donuts as they distribute pledge forms and brochures. This event is great for workplaces that employ shift workers or those who can't leave their desk for traditional events.
Cookbook	Compile a cookbook of employee recipes and sell to raise money for United Way.
Crossword Puzzle	To create awareness, generate a crossword puzzle using clues and answers from United Way's website. Award small prizes to the person who answers all questions correctly.
Dance Lessons	Talented employees offer to teach dance, yoga or aerobic lessons for a small fee with all proceeds to United Way.
Day of Caring	Help out at a United Way agency during the week or on a weekend. Jobs may include painting, building a fence, planting gardens, BBQ's, etc. These can be arranged by United Way.
Dress Up Days	Wear RED for United Way or dress according to a specific theme to build energy and excitement.
Dunk Tank	Employees pay a small fee to dunk their favourite Executive! Yes, you can rent Dunk Tanks!

Elevator Toll	Charge a toll for anyone using the elevator on a particular day of the campaign. Hand out "tickets" with United Way facts to create awareness while raising money at the same time.
Jail & Bail	Employees pay a small bail to free their favourite Executive from "jail"! Advertise all proceeds to United Way.
Lunch	Executive Chefs serve lunch to kick off your campaign.
Lunch & Learn	Leading up to your campaign, offer free information sessions during the lunch hour. Arrange for an Agency Speaker to present. Encourage employees to bring their own lunch.
Office Olympics or Mini-Golf	Schedule noon hour events each day during your campaign to promote team spirit and encourage inter-departmental competition. Charge a flat fee per team and donate proceeds to United Way.
Piggy Bank Challenge	Groups decorate piggy banks. Have a best dressed pig competition or fattest pig with the most dollars. Piggy banks then used for employees to drop-off their change during campaign. Alternately, have collection jars beside cash registers or vending machines and collect donations all year long.
Pie Throwing Competition	Pay to throw a pie in your favourite Executive's face!
Pizza Night	Free pizza for that 2 am shift. Arrange an Agency Speaker to raise awareness (yes, even at 2am!).
Potluck Lunch	Promotes team spirit.
Scavenger Hunt	Schedule during the noon hour to promote team spirit and encourage inter-departmental competition. Charge a flat fee per team and donate proceeds to United Way.
Shoe Shine	Executives shine shoes in exchange for a small donation.
Spelling Bee	Employees vs. Management. Use United Way words (messaging, agency names, etc), to create awareness and promote team spirit.
Talent Show / Karaoke	Encourage employees to compete for the title of "Workplace Idol". Executives or Local Celebrities can guest judge.
Themed Events	Coincide your campaign and/or event with the current season or holiday (Back to School, Thanksgiving, Halloween).
Trivia	Include questions about United Way and your own workplace campaign to create awareness. Award United Way merchandise to the person who answers all questions correctly.
Ugly Sweater Day / Ugly Tie Day	Employees can vote on their favourite (or "ugliest"), use as a fun event.
Video Game Tournament	Individuals or teams pay to play faves like Guitar Hero, Rockband and Wii Olympics. Teams can dress the part.

Offering free admission, charging a *minimal* fee for special events is a great way to ensure employees still have the capacity to support the annual campaign and help you reach your goal.

Better yet, why not use the donor's completed pledge form as an entry ticket to a special event!

Have questions or want to bounce around some ideas? Give us a call at 705-742-8839.

Wrap Up, Recognition and Evaluation

Wrap Up and Recognition

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.

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.

Sound like a lot?! Don't worry, you're not alone – We are here to help!

Campaign Materials

The following is a list of promotional materials that will be available for your workplace campaign. Please refer to this list while planning your campaign. Your United Way Representative will help you with your order.

Available to Have

- Pledge forms
- Information Pamphlets
- Posters
- Videos
- Balloons
- Stickers
- Pins

Available to borrow

- Pop up banner
- Outdoor flags
- Aprons
- Staff members

Tips to promote pledge card giving

- Reserved parking spots
- Lunch in the boardroom with the CEO
- Company promotional items
- Extra break/ shortened work day/ Friday afternoon off
- Free oil change
- Free assistance with personal income tax preparation from your accounting department
- Birthday vacation day
- A travelling trophy that goes to the department with the highest participation
- Dress down days
- Provide certificates for free coffee for a week
- Provide certificates for a free meal if an in-house cafeteria is available
- Spring cleaning or housekeeping service coupon
- A “make your own ice cream sundae” party
- Trade your job with the senior manager of your choice for a day
- Everyday Hero: Give a dollar a day for 1 year and be publicly recognized as an everyday hero. Everyone wants to be a hero
- Hand out pledge cards at the kick-off and encourage return of the pledge card at the end of the event to be entered into a draw for a prize. A donation must not be required in order to be eligible for the draw
- Encourage all staff members to submit their pledge form even if they are not donating to ensure that the organization can get an accurate sense of their participation rate
- Create visual representation recognizing people who have donated. The visual recognition encouraged other employees to make a donation
- Create ‘passport’ to all events for those who return pledge form early

* Where the donor received an item, privilege, or other benefit in return for a donation, the value of the benefit may not exceed the lesser of \$75 or 10% of the donation amount. For more information, visit cra-arc.gc.ca.

Completing and Submitting Pledge Forms

The United Way Peterborough & District pledge form has four sections to be completed by the donor (employee).

Section 1 – Contact Information

- Please ensure all information is filled out legibly
- Some ECCs choose to personalize this section for their coworkers by printing labels with the employee information and sticking it to section 1, making it easier to complete and track returned pledge forms

Section 2 – Donation

- Donor chooses giving method – Payroll deduction is the easiest way to donate!
- Donations of \$1,200+ (\$100/month) will make you a Community Leader and you will receive recognition in the UWP Annual Report. If the donor would like to be recognized for their Leadership gift, fill out section 3

Section 3 – Recognition

- If the donor is giving \$1,200+ please ensure this section is filled out

Section 4 – Payroll Deductions

- The serrated section of the pledge form should be completed by everyone who chooses to give through payroll
- Remove this section of the pledge form and forward to the payroll department

Put your money where your heart is

If the donor is especially passionate about a certain cause they can direct all or part of their donation to a specific outcome priority for UWP.

The donor can also designate their gift to any registered Canadian charity.

On the back of the pledge form you can find examples of your dollar at work! Use these to inspire your donors and show the specific impact their gift can have.

Your support **changes** lives



Here are just a few ways your donation ignites change in Peterborough

- \$2 per pay helps a family find stable and suitable housing
- \$5 per pay helps a family member to support their loved one living with a mental illness
- \$10 per pay provides healthy aging programs to help a senior stay in her home longer
- \$15 per pay helps a person struggling with unemployment to gain the skills needed to find a job
- \$20 per pay provides the tools, skills and support necessary to a child or youth to succeed at school
- \$40 per pay provides a child with a healthy breakfast to have well-nourished mind and body to perform at his best
- \$100 per month provides mentoring to inspire and empower youth to reach their potential as individuals and citizens

Completing Campaign Envelope

Following these steps ensures that all funds are recorded correctly and your workplace is properly credited for your campaign!

- Ensure all information on the sticker in the top right corner is correct including number of employees
- Attach donations (cheques, cash, etc) to the correct pledge form so it is apparent which donation belongs to which donor
- Keep all events money separate from donor's monies. There is a specific Special Events envelope that all collected funds should be kept in
- Glance over the pledge forms and ensure names and info are legible on the forms
- Alphabetize the pledge forms – I know that it's an extra step, but when the pledge forms are organized alphabetically (by last name) it makes life so much simpler
- Completely fill out front of envelope - It's important the front break down of the envelope is filled out so that if we do have to do some investigative work to determine what dollars are what, that we have a starting point



Leadership Giving

The Leadership Giving program promotes and recognizes personal contributions of \$1,200 or more to United Way Peterborough & District. Special recognition is given at five levels:

Philanthropic Circle	\$25,000+
Platinum	\$10,000 - \$24,999
Gold	\$5,000 - \$9,999
Silver	\$2,500 - \$4,999
Bronze	\$1,200 - \$2,499

United Way Peterborough & District will adopt these levels plus our own additional levels of recognition including:

Builders of the Way \$1,000 - \$1,199
Friends of the Way \$500 - \$999

- In some organizations, the CEO appoints an individual, usually a member of senior management, to serve as the Leadership Chair. This individual coordinates 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 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 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.
- 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

Charitable Tax Benefits

Your donations help others...The tax savings help you!

Your charitable tax credit reduces the amount of federal and provincial income tax you may pay each year. The system rewards extra giving - the more you give, the larger your tax credit and the less income tax you pay.

Your gift of:	Income Level			
	\$40,970 to \$81,941		Above \$81,941	
	Total tax savings:	Actual cost to you:	Total tax savings:	Actual cost to you:
\$100	\$20.05	\$79.95	\$22.88	\$77.12
\$200	\$40.10	\$159.90	\$45.76	\$154.24
\$500	\$160.58	\$339.42	\$184.98	\$315.02
\$1,000	\$361.38	\$638.62	\$417.03	\$582.97
\$5,000	\$1,967.78	\$3,032.22	\$2,273.42	\$2,726.58

First-Time Donor's Super Tax Credit

The First-Time Donor's Super Credit (FDSC) gives first-time donors and those who haven't claimed a charitable donation in the last five years an **EXTRA 25% on their tax credit for charitable gifts.**

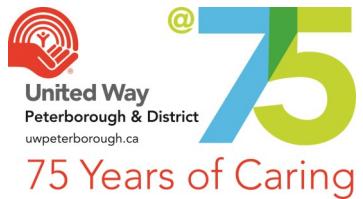
Tax Receipts

One-time gifts of \$20+ that are in our office before December 31st will be automatically issued a tax receipt from our office by the end of February,

Pay-roll deduction donors will see their receipt on their T4.

Visit Canada Revenue Agency's website <http://www.cra-arc.gc.ca> for more information.

**the rates mentioned above are based on taxation information obtained to date and may change without notice.*



Welcome to the 2016 United Way Campaign!

Inside this Campaign Package, you'll find the materials you need to help make your workplace campaign a success!

Workplace Campaign Package Contents:

- ✓ Pledge Forms
- ✓ United Way Campaign Posters
- ✓ Thermometer Progress Posters
- ✓ Special Event Envelope
- ✓ Where Your Dollars Go Posters
- ✓ 75th Anniversary Buttons and Stickers

Coming in mid-September! Changed Lives Made Possible by You Package

- ✓ United Way Impact Report Card
- ✓ Fast Facts about United Way
- ✓ Impact Stories from our Partner Agencies
- ✓ 75th Anniversary Retrospective

Watch your email for:

- ✓ Updates from UWP staff and volunteers
- ✓ Our United Way Newsletter
- ✓ 75th Anniversary Celebration Events & highlights

We're here to help!

Contact the UWP office if you would like any of the following for your campaign

- ✓ Impact Speakers or Videos from our Partner Agencies
- ✓ Balloons, Aprons, Stickers, etc.
- ✓ Any other information or questions you may have
705.742.8839 or email office@uwpeterborough.ca.

Connect with us!

[Facebook.com/UnitedWayPtbo](https://www.facebook.com/UnitedWayPtbo) & Twitter: @UnitedWayPtbo

Together, we are possibility.

FREQUENTLY ASKED QUESTIONS

I've heard things changed at United Way Peterborough (UWP). Why?

- In 2011, UWP started doing a comprehensive community research and consultation process to ensure our funding strategy was addressing the most pressing issues in our community
- The goal was to focus the donor investment entrusted to United Way where it would have the most impact
- A greater emphasis was placed on addressing the underlying causes of social problems, working to effect sustainable long-term changes

Where will United Way be investing donor dollars?

United Way's community investment framework is now focused on two priority areas:

- Moving people from poverty to possibility
- Creating healthy and strong communities

Moving People from Poverty to Possibility

We are committed to ensuring basic needs are met by investing services that address the following:

- People have access to safe, affordable, and nutritious food.
- People have improved housing stability.
- Seniors and individuals of working-age have the capacity to manage personal finances and build assets.

We are committed to equal access to opportunity and prosperity for individuals and families by investing in programs that address the following:

- Children & youth are able to achieve their education and training goals.
- Parents are supported to provide a nurturing environment for their children.
- People have the necessary skills to support personal and vocational success.
- Individuals of working-age are able to secure meaningful and fulfilling employment.

Building Strong, Healthy Communities

We are working to create a community where everyone is supported and belongs by investing in initiatives that ensure the following:

- Older adults are able to remain in their homes longer.
- Individuals and families affected by mental illness or addiction receive treatment and support.
- Survivors of violence or trauma are supported to recover and rebuild their lives.
- People are supported to build a sense of belonging and improve well-being.

Will two priority areas address all of the social issues affecting our community?

United Way cannot address every social challenge facing our community but we do know there are several critical areas where we can effect real and positive change. By combining community engagement with priority-setting and collective action, we hope to achieve lasting, measurable change together.

Why is United Way becoming more involved in policy and advocacy work?

While the majority of our work is partnering with many organizations to address immediate needs and to get at the underlying cause of social issues to prevent them from happening in the first place, we have also learned that there are some barriers in municipal, provincial and federal social policy. By advocating change around these social policies, we can make a more significant impact in our community.

How involved were member agencies in developing the new funding strategy?

Current member agencies actively participated in the process of developing a new funding strategy and had two years of notice about the impending changes. United Way actively sought the input and expertise of our partner agencies over the course of re-developing our investment framework. Agencies were involved and informed at each critical step in the process over the full three-years we took to create our investment framework.

All community agencies had opportunity to apply for funding under the new strategy. Some programs and organizations did not align with the newly developed funding strategy and some received less funding, but there were new programs and organizations that did align to the newly established priorities. UWP tried to alleviate as much stress and uncertainty as possible and provided transition funding on a case-by-case basis.

How did United Way decide which organizations qualified for funding?

In May 2014, the first step in the funding process launched with an open call for Letters of Intent. That process generated 60 applications for a total of \$3 million worth of funding. The 60 applications were thoroughly reviewed by a panel of volunteers from across all sectors of business, government and NFPs. These experts brought to the process their respective expertise and spent an average of 20 to 30 hours reviewing all of the applications and scoring each application individually.

They then came together with senior United Way staff and Board for 2 days to rank and build consensus on the best fit among those applications as they related to the outcomes that were determined with the community and shared with the community throughout this process. Those recommendations were then brought to the Agency & Community Service Committee (ACSC) to review, amend and to recommend to the Board for approval or revision.

Why did certain agencies not receive United Way Funding?

The decisions made are not easy but they are essential to move forward. There are effectively three main reasons why certain agencies did not receive funding in this cycle.

1. Only those agencies most strongly aligned to the Community Investment outcomes outlined above were able to receive funding given the limited resources available.
2. Only those organizations best able to meet our requirements around measuring and tracking the results received funding.
3. Concerns around an agency's reserve funds or levels of financial surpluses.

How long is funding provided to agencies?

Our intent is to be focused in our funding and to fund deeply over time. Our belief is this approach has the best chance of realizing impact in our community.

Our new funding model features three distinct funding streams:

- Long Term Fund: this is core funding over 3 to 5 years (75% of community investment dollars)
- Innovation Fund: shorter term funding over 1 to 2 years (20% of community investment dollars)
- Neighbourhood Fund: short term local funding (5% of community investment dollars)

Why should I donate to United Way Peterborough & District?

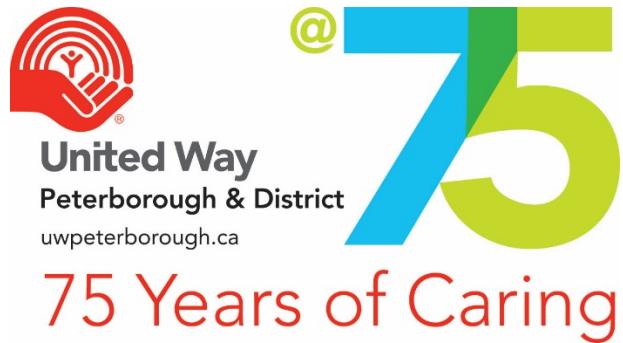
For 75 years, United Way has been defining and funding the most pressing and emerging needs in this community representing one of the most extensive collaborative approaches to create lasting change. It is the most effective and efficient way to advance the common good. When you invest in your community through United Way, you can trust that your dollars are being strategically invested where they are needed most.

Do funds raised by United Way Peterborough & District stay in the community?

Your investment goes far, but not far away! Unless directed by the donor to another United Way or registered charity, all donations stay right here in the City and County of Peterborough to help address the key social issues identified by our community.

How much of my donation does UWP use for fundraising and administration costs?

Fundraising costs represent 13% of the total funds raised and administrative overhead is only 8%. This means that close to 80 cents of every dollar raised is returned to the community. By comparison, the Canada Revenue Agency (CRA) considers 35% to be an acceptable standard. Every dollar donated and every dollar spent is accounted for in our independently audited financial statements contained in our annual report.



Together, we are possibility.

Thank You!



@UnitedWayPtbo



[Facebook.com/UnitedWayPtbo](https://www.facebook.com/UnitedWayPtbo)