



United Way
Peterborough & District
uwpeterborough.ca

DO YOU KNOW WHAT YOUR DONATION LOOKS LIKE?



Employee Campaign Co-ordinator Handbook

2017 Campaign

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 Partner 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

Your role as Employee Campaign Co-ordinator (ECC)

Welcome to the team!

Workplace campaigns account for well over half of our campaign achievement and ECCs (Employee Campaign Coordinators) 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
2. Build your team
3. Analyze, develop an Action Plan, and goal set!
4. Kick off and Canvass
5. Hold Special Events
6. Wrap-up, Recognition and Evaluation

Benefits to you:

1. Opportunity to learn/develop leadership skills
2. Lead a project from start to end
3. Develop fundraising skills
4. Get to know your colleagues/network
5. Gain knowledge of other divisions/departments of your organization
6. Make a difference in the lives of people in your community!



Volunteers at the City of Peterborough's 2016 Campaign Launch!

We are here to help!

United Way staff and reps are an important tool, and we are here to support you every step of the way! If you cannot remember who your staff support is email office@uwpeterborough.ca with your name and workplace and we will connect you.

Find everything you need online at www.uwpeterborough.ca/how-to-help/run-a-workplace-campaign/ including:

- Videos
- Posters
- Success stories
- Campaign ideas
- Training information
- Additional info on the work of UWP

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.



Outcomes of Your Investment:

United Way has identified 16 priority outcomes to guide all our investment activities.

Your investment helps people meet their basic needs through:

- Food Security
- Housing Access & Stability
- Financial Literacy & Income Growth



Your investment helps people gain skills and realize their potential through:

- Education and Life Skills for Youth
- Supports for Families
- Employment and Skills Training



Your investment helps people establish:

- Healthy Aging for Older Adults
- Mental Health & Addictions Recovery
- Violence or Trauma Resilience
- Inclusive Community



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 5 years (75% of community investment dollars)
- **Innovation Fund:** shorter term funding up to 2 years (20% of community investment dollars)
- **Neighbourhood Fund:** short term local funding (5% of community investment dollars)

Fund Distribution

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 Community Impact Committee, who then seek final approval for use of funds from the United Way Board of Directors.

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
- CMHA
- Community Care Peterborough
- Community Counselling & Resource Center
- Community Living Peterborough
- Elizabeth Fry Society
- John Howard Society
- Kawartha Sexual Assault Centre
- New Canadians Center
- PARN
- Peterborough Community Chaplaincy
- PCCHU (Food for Kids)
- Peterborough Family Resource Centre
- Peterborough Youth Services
- Trent Valley Literacy Association
- YES Shelter for Youth and Families
- YWCA

United Way's Innovation Funding

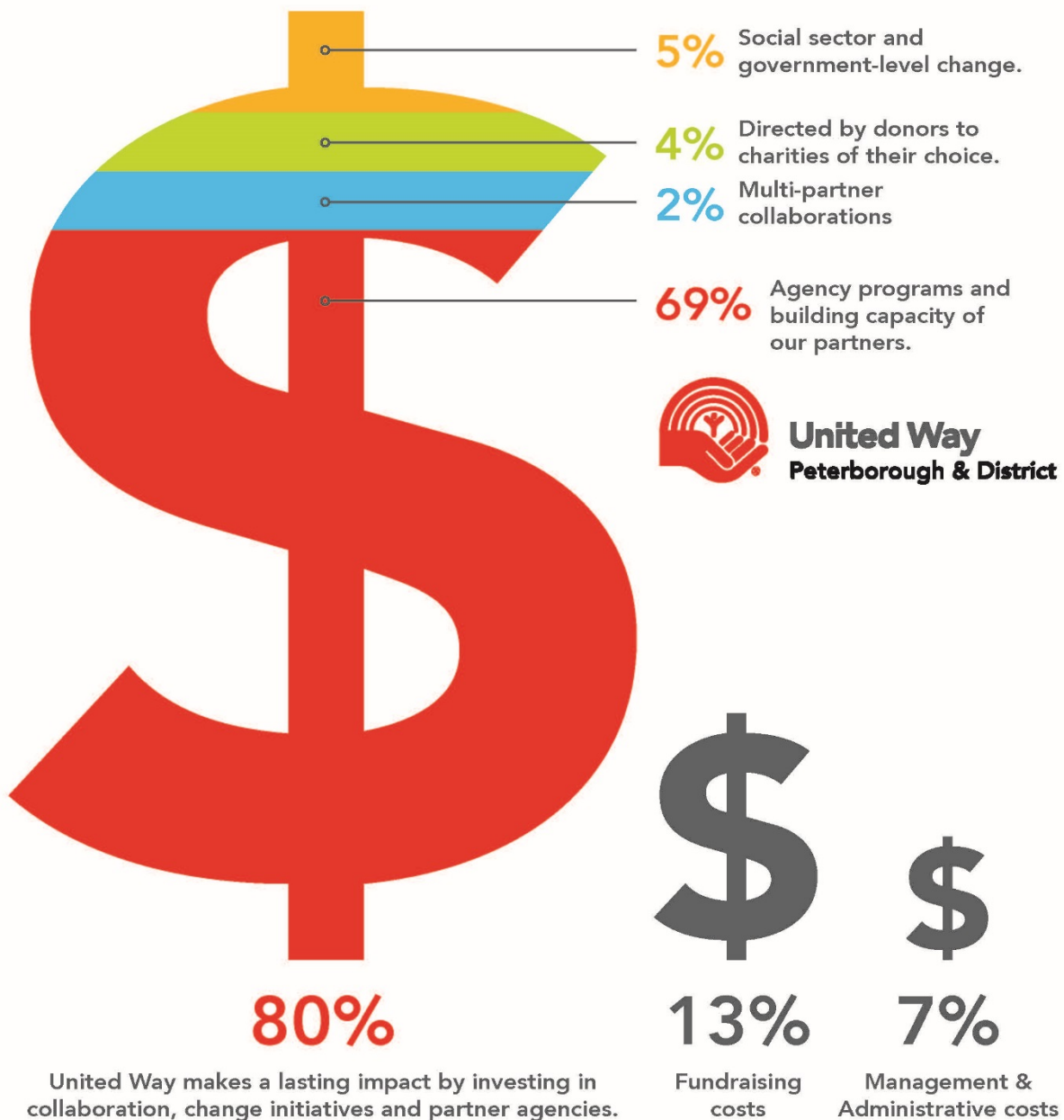
Through our Innovation Fund, United Way supports non-profit innovators, whether small or large, to design and/or deliver new initiatives that meet identified emerging social issues. Innovation Funding is one-time funding provided for up to 2 years to an individual charitable organization for their own 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.

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% (\$25,000) of our community fund to this important work.

Where your dollars go...

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



All information based on Audited Financials.

Elevator Pitch

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. 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.

United Way researches where our community is most vulnerable and then invest in programs and form partnerships to prevent social issues from becoming crises.

A gift to United Way Peterborough & District is the gift that helps the most.



The Longer Version

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 the critical programs and services of our 16 partner agencies. 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.

Giving to United Way helps approximately 60,000 people in Peterborough County and City. Chances are, United Way has helped someone you know.

Your donation will be used to:

- **Ensure that basic needs are met**
Your donation provides access to nutritious and affordable food; builds knowledge and skills regarding food literacy, nutrition, preparation and use; supports individuals and families to secure and maintain stable housing; and provides training in the fundamentals of financial literacy and financial management.
- **Help youth realize their potential through education and life skills support**
Your donation provides mentorship, recreation, and education support for youth at risk; promotes employment readiness for youth facing barriers to employment; and ensures that at risk youth are provided shelter and support for a brighter future.
- **Support healthy aging for older adults**
Your donation helps older, often isolated, individuals maintain their quality of life and remain in their own home safely, independently, and comfortably.
- **Help parents provide a nurturing environment for their children**
Your donation builds leadership, parenting, and coping skills within vulnerable families; provide parents with the necessary skills to support personal and vocational success; and help individuals of working-age are able to secure meaningful and fulfilling employment.
- **Build a vibrant community where every individual has the opportunity to experience personal safety and wellbeing**
Your donation promotes resilience and recovery for those living with a mental health issue or an addiction; support those affected by violence or trauma and promote safety in relationships; and assist newcomers and others entering the community to settle successfully.

“I can’t afford to donate enough to make a difference”

United Way stretches your dollar to create the largest impact possible:

- \$2 per pay helps a family find stable and suitable housing
- \$5 per pay helps a family member to support a loved one living with a mental illness
- \$10 per pay provides healthy aging programs to help a senior stay in their home longer
- \$15 per pay (approx. \$1 a day) helps a person struggling with unemployment to gain the skills needed to find a job

Each individual’s gift, no matter how big or small, makes a difference in our community!

If your company matches gifts, mention each gift has double the impact!

How to Run a Campaign

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 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



Trent University's UW Committee at their BBQ launch

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+)



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’ PartnerAgencies 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.

The Ask

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.

Sample Ask

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.

Know your campaign details:

- When is your campaign beginning/ending
- Tell them about the exciting events you have planned (and about the access pass if you are using this incentive).
- Share your campaign goal

Be prepared for questions and concerns

- Familiarize yourself with UWP and our work
- Arm yourself with our FAQ (included in this guidebook)
- If you don't know the answer or are not comfortable answering the question, offer to get back to them and send along the question to your UWP staff support. It's ok not to know!

Make the ask

- Find out their interests and connect them to United Way
- One on one and peer to peer is the best way to ask

Tips for making the ask

- Be positive
A smile can go a long way
- Ask co-workers you know first
Start by approaching the people you're most comfortable with first. You'll gain confidence and be ready to approach those you don't know well after
- Highlight the importance of each gift
Talk about the impact of each individual's gift and the difference it makes in the community
- Mention the ease of giving
Encourage giving through payroll. Emphasize how their gift can be spread over 24 or 26 pay periods. Tell them that their payroll gift is recorded on their T4 so it's easy at tax time.
- Contributing is voluntary
Share your enthusiasm and be a resource to help your co-worker make an informed decision about giving.

SAMPLE ASK

"I just wanted to come by and drop off this United Way pledge form and some information about some key United Way-supported programs that are happening right here in Peterborough City & County!

Your gifts make a difference right here in our neighbourhood. To help the most people, we are striving for GOAL (amount or participation level).

If you have any questions about United Way please let me know. Thank you for your thoughtful consideration to pledge this year!"

Tips for promoting 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
- 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.



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).



UWP CEO Jim Russell drops the puck at BDO's annual hockey tournament fundraiser

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.

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!

Nickel-and-dimed vs. pledge-based

Nickel-and-dimed: Betty pays \$5 to enter into a Jays game draw, \$8 for raffle tickets, and \$2 for dress down Fridays. Since Betty has already made 3 donations she does not submit a pledge form.
Total donation = \$15

Pledge-based: Betty fills out her pledge form to get an All Access Passport, which includes an entry into the draw, 5 raffle tickets, and access to dress down Fridays. Betty pledges \$1/day = \$365 gift and freely enjoys all the fun

Extra impact for our community = \$350!

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.

Debrief/Evaluation

It is important to reflect on what worked and what didn't at the end of your campaign. We are happy to facilitate and take notes at a debrief session.



Celebrate your campaign results!

Union Involvement

United Way and organized Labour have a strong and long-standing partnership. If your workplace is unionized, run a joint union and management campaign. Here are some tips that you should use in your campaign:

Include Union Representation

Ask the unions to appoint a campaign representative. Ideally this person should be part of the union executive and a co-chair of the campaign. Union campaign representatives help secure joint union/management endorsements and assist in formulating strategies and campaign events that appeal to union members.

National Union and joint union/management endorsements

Use national and local union endorsement letters to build support for your campaign. These letters show solidarity between national and provincial unions and United Way. A joint union/management endorsement letter shows a similar level of support between the local union(s) and employers.

Ask your staff support if you are interested in an example of a union endorsement letter. Ask the employer and unionized executive to sign the joint union/management letter endorsing your campaign. Distribute the letters to all union and non-union members.

Labour-focused presentations

Appeal to social advocacy and justice as well as charitable giving when presentations to a unionized work environment. Ask your staff support for ideas and assistance with these presentations.



Recognition

Include union logos on all marketing materials produced in-house with a line noting sponsorship from unions, if applicable. Use union banners/flags at departmental and cross-departmental events.

At events, verbally credit both union and management support of the campaign. Ensure management credits union support of the campaign.

Examples of organized Labour and United Way Partnership in Peterborough City & County:

- Advocating for 15 and Fairness
- Tampon Tuesday
- Basic Income Guarantee joint submission

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
- 'I donated' Stickers

Available to borrow

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

**Be a leader.
Change a life.
Give \$100 a month.**

Making an annual donation of \$1,200 or more to United Way Peterborough & District distinguishes you as a leadership donor.

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.

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

FREQUENTLY ASKED QUESTIONS

Why should I donate to United Way Peterborough & District?

A single donation to United Way Peterborough means you are helping 16 local organizations to create hope and possibility for 60,000 people living in our community. Together, we make a difference every single day. 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. Our funding provides relief when basic needs such as food or shelter are nowhere to be found while also creating hope by helping job seekers to find work and youth to go on to graduate. These are only a few of the ways your donation creates change. When you give to United Way you are changing lives.

Where does my money go?

Our work is focused on two priority areas -- moving people from poverty to possibility and creating healthy and strong communities. To learn more about our work in these areas, please keep reading.

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.

Why would I give through United Way Peterborough & District when I can give directly to an agency?

When you give to United Way Peterborough, you are supporting more than one individual cause. You are supporting a big picture perspective that takes the needs of an entire community into account. Our most vulnerable residents are dealing with complex and interconnected issues. You can support these individuals by helping to fund a range of local programs and services that create a circle of care, providing both immediate and long-term support.

How are Partner Agencies selected and funding amounts decided?

We use a comprehensive allocation process to make decisions about where to invest donor dollars in our community. We begin with establishing an evidence-based model for building a strong community and alleviating pressing social issues. We then assess the suitability, alignment, and effectiveness of an organization's ability to deliver on that vision. All applications are scored and assessed by a panel of volunteers and experts in areas such as finance, organizational management, and community development. These recommendations are then further vetted by our Community Impact Committee with final approval coming from our Board of Directors. But the work doesn't stop there! United Way Peterborough also monitors funded organizations to ensure ongoing operational effectiveness and achievement of funded outcomes. This process is a core principal of our work as we believe that donor dollars have to be invested wisely for the greatest impact in our community.

Why aren't all agencies a part of United Way Peterborough & District?

There are many important programs in the community responding to individual and family needs. Our ongoing support of agencies is a business decision that involves a long-term financial commitment. In order to continue that support, we must make decisions that keep us within our financial abilities. The number of agencies or programs funded depends on campaign dollars raised.

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 funding model features three distinct funding streams:

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

Why do some agencies have their own fundraising drives?

United Way does not fund the entire budget of any of our agencies. All agencies are encouraged to seek out a variety of funding sources. For major expenses and initiatives, such as large-scale renovation, agencies often conduct their own fundraising drives.

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 7%. This means that 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.

In addition to running a workplace campaign, how can I support United Way?

Organizations can become engaged in United Way's work beyond running a workplace campaign by making a corporate donation; participating in United Way events; seconding or sponsoring an individual to the Sponsored Employee Program; special event sponsorships; Gift-in-Kind donations; and professional service contributions.

thank you!

Share that you care.

Visit our social media channels to celebrate your UWP campaign with the community.

#WeArePossibility
#ChangeALife
#NowMoreThanEver
#Give4LocalResults

