

Workplace Campaign Canvasser Guide

An effective guide to help
you succeed as a workplace
canvasser

Give. Volunteer. Act.



United Way
Kingston, Frontenac
Lennox and Addington

THANK YOU FOR VOLUNTEERING

You are making a difference, by volunteering your time to canvass your colleagues. This guide has been put together to help you succeed as a workplace canvasser.

If you have any questions – remember you're not alone.

Contact the United Way office at:

(613) 542-2674 or campaign@unitedwayfla.ca.

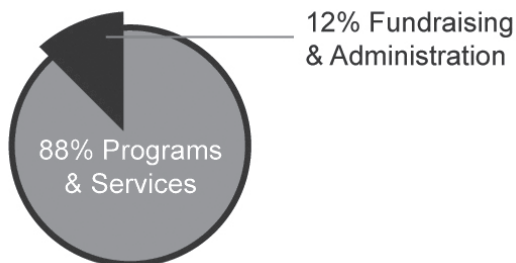
Building a Stronger Community Together

The United Way movement was started in Denver in 1887 by a Rabbi, a Minister and a Priest, who got together to help miners' families. The United Way's roots in Canada began in 1917 in Toronto and Montreal. United Way serving Kingston, Frontenac, Lennox and Addington began as The Community Chest in 1941 when \$23,500 was raised to support human care services throughout this region. In 2010, the United Way raised \$3.1 million.

United Way is accountable to you and the community

At United Way, we promote responsible stewardship of our community's resources. Our fundraising and administration costs are among the lowest in the charity sector. In 2010, they were 12%, well below the average cost of fundraising and administration.*

Our United Way also actively solicits in-kind donations, pro bono services and the support of over 2,000 volunteers to keep expenses as low as possible - and ensure that as much as possible of every dollar goes directly to programs in the communities we serve.



**Imagine Canada puts the average cost of fundraising and administration at 35%.*

Community Investment Fund

United Way strategically invests your donation in programs, services and initiatives that meet immediate needs. United Way also invests in long-term solutions to address local issues.

United Way is a major funding organization that delivers ongoing support to social service agencies through its Community Investment Fund, supporting a network of programs and services. This base support of funding to member agencies provides stability and allows them the flexibility to develop and respond to the emerging needs of the communities they serve. It allows them to make long-term plans, knowing they have a stable source of funding. United Way also provides one-time grants to community agencies, allowing them to respond to new emerging needs and issues.

Your one gift to the United Way Community Investment Fund will reach every sector of the community and address multiple needs throughout KFL&A. Last year 74,000 people benefitted from a United Way funded program.

We make a difference every single day

United Way funds a network of programs and services that cover a wide range of human care needs. Over time, our United Way's role has evolved from fundraising and fund distribution to community building, working with partners on community initiatives in three identified key impact areas.

The impact of United Way funded programs and services is measured against these three areas:

BELONGING TO COMMUNITY: FROM POVERTY TO POSSIBILITY

From Poverty to Possibility targets poverty, homelessness and neighbourhoods. The goal is to help people engage in their community by strengthening neighbourhood revitalization efforts, reducing poverty, and improving access to affordable housing.

TURNING LIVES AROUND: HEALTHY PEOPLE, STRONG COMMUNITIES

Healthy People, Strong Communities targets vulnerable people, people with barriers and in need of support, seniors and victims of violence and abuse. The goal is to improve opportunities for people to access programs and supports that empower them to overcome barriers, build resilience, reduce isolation and be part of a caring, inclusive community.

GROWING UP GREAT: ALL THAT KIDS CAN BE

All that Kids Can Be targets early years, children & families and youth. The goal is to ensure children and youth are valued and supported members of the community with opportunities and resources to help them reach their fullest potential.

Donor Choice Option

In some cases, donors may wish to designate a portion of their contribution to a specific United Way community or a specific agency.

Donors can choose from the following options when making their decision:

- To the Community Investment Fund
- To impact areas
- To specific registered Canadian charities

A minimum donation of \$20 is required for designations.

– All designations are paid over and above any allocation an agency receives.

– A 10% processing fee applies to all designations, except to other United Ways.

This covers some of the costs incurred in tracking and processing the donation.

Tax Benefits of Giving

Income Range	Less than \$75,769		Above \$75,769	
	Total Tax Savings	Actual Cost to you	Total Tax Savings	Actual Cost to you
\$50	\$10.53	\$39.47	\$12.32	\$37.68
\$100	\$21.05	\$78.95	\$22.44	\$77.56
\$200	\$42.10	\$157.90	\$48.88	\$151.12
\$500	\$162.58	\$337.42	\$188.10	\$311.90
\$1,000	\$363.38	\$636.62	\$420.15	\$579.85
\$5,000	\$1,969.78	\$3,030.22	\$2,276.54	\$2,723.47

Options for Giving

- Payroll Deduction: Employee payroll deduction plans through workplaces are the easiest and most convenient way to give to the United Way. Payroll deduction receipts will appear on your T4.
- One-time donations by cash, cheque or credit card.
- Monthly donations from credit cards or chequing accounts (these are processed on the 15th of each month beginning in January).
- Gift of Securities: Benefit from the tax advantages of donating securities and help your community at the same time! Securities donated to charity are not subject to capital gains tax, and the donor receives a charitable tax receipt for the full market value.
- The Eternity Fund is the United Way serving KFL&A's endowment fund. Administered by the Kingston Community Foundation, gifts to The Eternity Fund are invested forever and only the interest is spent. This investment income will support essential programs and services in our community.

Eternity Fund gifts can be in the form of cash, life insurance, securities and real estate.

- Recognition Levels:

Heroes	\$1 a day
Friends	\$500 - 999
Leaders	\$1,000 - 1,999
Builders	\$2,000 - 4,999
Pacesetters	\$5,000 - 9,999
Patrons	\$10,000 - 24,000
Philanthropists	\$25,000+

The impact of your donation:

Donations to United Way serving KFL&A impact the lives of thousands of people every year. The following is a brief list of examples that show what a difference United Way and its member agencies made in just one year.

Thanks to your generosity:

Belonging to Community: From Poverty to Possibility

- Over 33,000 meals were served and groceries made available to the most vulnerable people in our community, improving their nutrition and food security.
- 1,039 people found stability with a place to call home through emergency, transitional or permanent housing.
- 450 kids started the school year off right with school supplies and backpacks.
- 130 low-income or working-poor families were able to keep the heat on in the winter.
- 171 homeless kids and adults had the basic necessities provided and a place to sleep.

Turning Lives Around: Healthy People, Healthy Communities

- More than 200 seniors found a new sense of safety with the help of peer support for elder abuse.
- 564 women and their kids were able to start again, free from violence and abuse with the help of safe accommodation, counseling and supports
- 188 people living in rural and isolated communities enhanced their well-being with help for family or personal issues through free local counseling and social programs.
- 353 people improved their literacy skills and gave themselves a chance to earn more money, improve their health and enjoy a stronger future.
- 268 physically disabled kids and adults were able to move more freely after acquiring basic mobility devices.
- 266 people with vision loss were able to maintain their independence and stay active by learning daily living skills, specialized vision skills and safe indoor and outdoor travel methods.

Growing Up Great: All That Kids Can Be

- 12,000 elementary and high school students had nutritious in-school snacks and meals, helping them to improve their concentration and engagement.
- 761 youths between the ages of 9 and 19 received counseling and intervention support for gambling and substance abuse, enabling them to make better life choices.
- 221 kids developed healthy attitudes and social skills through positive relationships with adult mentors.
- 117 low-income adults and kids in Napanee strengthened their sense of belonging by taking part in affordable family-oriented community activities.
- 1,427 children and youth had the opportunity to develop confidence and learn new behaviours, attitudes and social skills through educational, social and recreational programs.

**For more impact statements and for testimonials, please contact the United Way office.*

4 Steps to Successful Canvassing

The most effective method of fundraising is face-to-face or one-on-one canvassing. There are four basic steps to successful canvassing:

STEP 1: PREPARE

STEP 2: ASK FOR THE GIFT

STEP 3: THANK

STEP 4: FOLLOW-UP

Step 1: Prepare

Learn about United Way before you begin asking co-workers for their donation. You must be able to answer their basic questions and concerns and have appropriate information ready so that your canvass will be as effective as possible.

- Attend a canvasser training session
- Review and become familiar with the information in the materials and on our website at www.unitedwaykfla.ca
- Visit United Way agencies to learn more about their programs and services
- Ask any questions you may have about United Way during your training
- Call the United Way office or ask your Employee Campaign Coordinator
- Find out about your employee campaign history

There are several other things you can do to help prepare for a more successful canvass:

- **Consider your own personal reasons for giving:** make your donation first
- **Prepare personalized pledge forms:** You may be provided with personalized pledge forms. Or you can write or print the names on the forms yourself. This is also a very simple way to track which employees you have already canvassed. If you have forms left they will have the names of those still to canvass on them.
- **Schedule brief canvass visits with employees:** take into consideration the best times and days to meet with them. You want to ensure that you will not be interrupting them at an inconvenient time.
- **Identify the people on your list who are past donors** (if available): plan to approach them first or start with people with whom you have a good relationship. This will help build confidence and momentum in canvassing.

Step 2: Ask for the Gift

People give to people and the number one reason people don't give is that they were not asked. Making the 'ask' personally will increase your success rate.

- **Set the tone:** Thank your colleague for agreeing to speak to you and for his/her past support (if information available). Explain that the purpose of the visit is to talk about the United Way, the workplace campaign and to ask for their support
- **State the Case:** Explain your personal reasons for supporting the United Way and also outline some key messages about the United Way's impact on the community. Include any pertinent information that you feel would appeal to the potential donor: the types of agencies that receive funding, the low administrative costs, the abundant use of volunteers to run the campaign or the accountability and strict code of ethics followed by the United Way and all of its member agencies.
- **Ask for the Gift:** Present each person with their personalized pledge form and brochure and ask them to consider supporting the campaign. Don't forget to explain the benefits of giving through payroll deduction.
- **Let them know** that you are hoping for an early response but that you would be glad to give them the time they need to make their decision.
- **Ask them** if they have any questions and make sure that you get answers back to them right away. If you aren't sure of answers, contact your United Way staff partner.

Step 3: Thank

- It is important to thank everyone, even those people who do not donate. Thank people for their time as well as their contribution. Remember, the impression you leave is the one that people will remember when they think of United Way.
- You may thank in person or send a thank you note. Work with your ECC to see if a system has been set up to thank donors and to ensure everyone gets thanked.

Step 4: Follow-up and Wrap-up

Ensure that everyone has been given an opportunity to participate in the campaign.

- Keep track of anyone who was away on vacation or sick leave and make sure that they have been canvassed before you close out your campaign.
- Make sure that anyone who had questions that you were unable to answer receives a reply so that they can make their decision regarding their donation.
- Once you have established that your canvass has been completed, compile the results and pass them along to your ECC.

Canvasser Checklist

- Meet with Employee Campaign Coordinator (ECC)
- Attend a canvasser training session
- Read United Way materials or visit the website: www.unitedwayfla.ca
- Join the United Way “Seeing is Believing” tour
- Make your own personal donation
- Identify the employee group to be canvassed
- Prepare personalized pledge forms
- Meet with each employee on the list
- Follow up with any questions that need answers
- Thank all employees for their time
- Follow up with previously absent employees
- Ensure that all forms are filled in correctly and forward to ECC or treasurer
- Communicate and celebrate campaign results with all employees

Frequently Asked Questions

Why is my donation best utilized by giving to the *United Way*?

The *United Way serving KFL&A Community Investment Fund* supports a network of programs and services that help a wide variety of people in the community. A panel of informed community volunteers, who are aware of local needs, distribute the donations where they are needed most and monitor member agencies to ensure accountability to you. Your one gift to the *United Way Community Investment Fund* will reach every sector of the community and address multiple needs throughout KFL&A.

How much does United Way spend on fundraising and administration costs?

United Way keeps fundraising costs to a minimum thanks to community partnerships and thousands of volunteers. Imagine Canada puts the average cost of fundraising and administration for non-profit organizations in Canada at 35%. Our audited financial statements show our fundraising costs to be 12% including administration.

If United Way raises funds for so many agencies, why do I still receive requests for money?

There are many organizations in our community that are not funded by United Way. For member agencies, United Way does not provide 100% funding for any one program or to any agency. This is to ensure sustainability and viability of all United Way funded programs or services.

I live outside of Kingston, Frontenac, Lennox & Addington. Where will my donation go?

You can designate your donation to any specific United Way community or a specific charity (member or non member agency) by indicating your choice on your pledge card.

My spouse gives at work. Why should I give?

United Way volunteers suggest that we all make a contribution based on our individual income level. Through payroll deduction, one smaller gift, added to another, equals a painless way to give a larger gift. You can add your partner to combine your gifts for favorable tax write-offs and recognition.

Doesn't the government provide money to help your agencies?

United Way itself does not receive government funding. Many government departments fund or purchase services from United Way agencies. United Way is one of the only stable sources of funding for some agencies.

I never use agency programs, so how do I benefit by giving to United Way?

United Way is a network of care that you support now so that essential programs and services will be available in the event that you need to access them. Your gift ensures that you and those you care about will have support when it is needed. Your gift to United Way is a sound investment in the quality of life of your community. Whether it helps your neighbour cope with a hearing or vision loss or supports children at risk, we all benefit from a healthy, supportive community.

I don't like Agency X. I don't want my money to go to them, so why should I give to United Way?

There are many agencies that United Way funds that provide essential services to one in three local residents. Why penalize all of them because of one agency?

When will the agency I have designated to receive my donation?

If you give by cash, cheque or credit card, your donation will be sent to the agency in the Spring of the year immediately following the campaign along with all other donations directed to that agency. If you give through payroll deduction, your donation will be sent to the agency, a full year after the campaign, once all payroll deductions have been collected, remitted, and consolidated to United Way. i.e. If you donated in the 2010 campaign through payroll deduction, your pledge is deducted from your pay in 2011 and the funds will be sent to the agency in the spring of 2012.

When will I get a tax receipt for my donation?

If you give through payroll deduction, your contribution will be on your T4 at the end of the next calendar year. If you give by cash, cheque or credit card, your tax receipt will be mailed to your home address by February 28 of the following year. Please ensure you complete the home address section of the pledge form if donating by cheque, cash or credit card as Canada Revenue Agency requires that tax receipts be sent to home addresses.

I'm concerned about protecting my privacy. What does United Way do with my personal information?

All information concerning your contribution is confidential. It is treated with the strictest confidence. United Way serving KFL&A does not trade, sell or distribute donor information. To view our privacy policy, visit our website at www.unitedwaykfla.ca.

What if I retire?

You have two options. You may pay off the balance in a single payment or continue your annual support as a residential donor. If you provide your address on your pledge form and check the box indicating that you are retiring, United Way will send a pledge form to your residence in future years so that you can continue your support. You can continue to do so in monthly installments through credit card or pre-authorized payment.

What is The Eternity Fund?

The Eternity Fund is United Way serving KFL&A's community-wide endowment fund. Donations to the Fund are permanently invested, and the interest is used to help United Way fund programs and services to help all residents live with hope, dignity and a sense of belonging.

Tips for Responding to Questions:

Listen and empathize

Make sure the person feels you are hearing their concerns. Show that you understand the objection, but don't agree with them. Instead, say: "I understand why you feel that way. Have you considered...?"

Encourage questions and discussion

Let people express themselves. Welcome their questions. It gives you an opportunity to address their concerns and correct any misconceptions they might have about United Way.

Relax and be yourself

You have an important idea to present. Making the information your own will help you relax. You should never feel like you have to argue or match wits with anyone. Your job is simply to convey to people that United Way is an effective way to create opportunities for a better life for everyone.

Don't worry if you don't know the answer

You're not expected to know everything about United Way. If you don't know the answer to a question, tell people you will find the answer and get back to them. Contact your ECC, United Way staff partner or Loaned Representative for any information you might need.

Filling out the Workplace Pledge Form:

Section 1 (personal information)

Name: Preferably pre-printed with employee name. Otherwise print clearly.

Company Name: Preferably pre-printed but otherwise please print clearly.

Home Address: Only necessary if receipt is required for cheque or cash gift. Donor must indicate that they would prefer their receipt to be mailed to their home.

Age Range: Check the applicable range, which will assist United Way in tracking demographics of our donors.

I am planning to retire: Check to have pledge form mailed to your home address in future years (ensure address section is completed).

Section 2 (making the gift)

Community Investment Fund: The most effective use of donors' gifts providing the broadest range of support to the areas of greatest local need. Please fill in the amount being directed to this fund.

Targeted impact: The donor may choose to direct all or a portion of their gift to our 3 impact areas.

Any Registered Canadian Charity: This can either be one of our member agencies or any other registered Canadian Charity. Please include the charitable registration number (available from the Canada Revenue Agency website). Please note that there is a 10% processing fee and \$20 minimum for designations.

Donors may choose to divide their gift between several of the above options. They need to ensure that the amounts add up to the 'Total Gift' amount. Please check all math.

Section 3 (payment options)

Payroll Deduction: Please enter \$ amount X number of pay periods and fill in total amount.

Cash: Please enter amount.

Cheque: Please make cheque payable to **United Way** and fill in amount.

Credit Card: Please print number clearly and include expiry date. One of the 2 options can be chosen: one time gift, or a monthly gift. If monthly, complete the \$ amount X 12 months in the monthly giving program section, and fill in the total amount that it calculates to.

Pre-authorized payment: Only valid with a void personal cheque attached. Payments will be deducted on the 15th day of each month, for a period of one year.

Section 4 (other giving options)

Endowment Fund: Please check to receive information about Planned Giving.

Will: Please check if you plan to include United Way in your will.

Securities: Please check if you would like to make a gift of securities. Donor must contact their financial advisor or download the transfer form from our website at www.unitedwaykfla.ca

Section 5 (leadership giving)

Please make sure that the appropriate leadership giving level box is checked. Donor should choose to check off the 'acknowledge publicly' or the 'remain anonymous' box. The donor can also indicate a combined gift by providing the name and workplace of their partner.

Section 6 (signature)

Pledge form should be signed and dated by the donor.

Additional Tips and Information:

- All gifts should be accompanied by a pledge form even if not receiving a receipt. This ensures a correct calculation of number of donors. Special Event proceeds do not need a pledge form.
- Payroll deduction receipts appear on the employee's T4.
- All one-time gifts of \$20 or more will receive a tax receipt.
- Monthly donors will receive a tax receipt at the end of the year.

Pledge Forms:

- 3-part Forms: If using 3-part pledge forms, the pink copy is the donor's copy, the payroll department of the workplace receives the yellow copy and the white copy is forwarded to United Way.
- Legal Size (perforated) Pledge Forms: If using legal size 1-part pledge forms, the bottom tear off is the donor's copy, the second tear off is for the payroll department of the workplace and the top portion is forwarded to United Way.
- GCWCC/Provincial Forms: If using GCWCC/Provincial pledge forms, complete the bottom tear off is for the payroll department of the workplace and the top portion is forwarded to United Way.

Visit our website at www.unitedwaykfla.ca to view our annual report and financial statements, information and updates.



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