

Employee Campaign Coordinator Toolkit

An effective guide to help your workplace campaign

Give. Volunteer. Act.



United Way
Kingston, Frontenac
Lennox and Addington
Change starts here.

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THANK YOU!

WELCOME TO THE UNITED WAY TEAM

You are making a difference, by volunteering your time.

This guide has been put together to help you run the best campaign possible. It is full of useful hints and suggestions and will give you an introduction to “best practices” from other local campaigns... what works, and what may not.

Remember you’re not alone. Contact the United Way office at 613-542-2674 or campaign@unitedwaykfla.ca if you have any questions or comments.

My staff partner is: _____

Phone: 613-542-2674 ext. _____

Cell: _____

Email: _____@unitedwaykfla.ca

Some common United Way terms

Employee Campaign Coordinator (ECC): the key volunteer in the workplace, responsible for leading, managing and monitoring an employee campaign

Campaign Committee: the team of people who work with the ECC to plan and implement the campaign

Canvassers: the “heart” of the campaign, canvassers canvass their peers on behalf of the United Way

United Way Mission Statement

“To support and strengthen the organized capacity of our community to care for one another.”

To this end...

- We continually raise funds, striving for annual growth to meet vital community needs
- We allocate donor dollars in response to current and changing human care needs
- We strengthen the non-profit sector by providing organizational and other support services to community voluntary organizations

Employee Campaign Coordinator (ECC)

A unique personal and professional opportunity

- “You will head up a project team made up of people from your organization.
- Your team will be given a highly measurable and challenging financial goal to achieve, but in the past every team that has been assigned a similar project has made the goal.
- You will not have formal authority over anyone on the team but must guide them by means of persuasion and your personal credibility and influence.
- You will be able to work closely with a large number of people both inside and outside the organization.
- As project manager, you will interact with the senior leadership team of both your company and other organizations. You will meet a large number of the community's leaders in the social service, government and educational domains in both business and social settings.
- The project and your personal performance will be watched closely by large numbers of influential people. There will be significant rewards for success and penalties for failure.
- You will work very hard but will be very likely to succeed, since everyone before who has accepted the assignment has succeeded at it.
- At the end of the project -- assuming you also succeed -- there will be a major celebration.
- Does this not sound like a perfect development opportunity? It arises annually in virtually every organization....
It's called United Way coordinator.”

From The Performance Appraisal Question and Answer Book, by Dick Grote

An Employee Campaign Coordinator is a key volunteer in the workplace who is responsible for leading, managing and monitoring the Workplace Campaign.

Time frame & key meetings

2-3 months

- Committee and/or canvasser meetings if necessary
- Conducting the annual workplace Campaign
- Attending Campaign events through the course of the Campaign

Reporting relationships

- Supported by United Way staff and loaned rep team
- Coordination with volunteer from Campaign Cabinet

Qualities to ensure success

- Leadership & dedication
- Communication and motivational skills
- Planning & analytical skills
- Attention to detail
- Committed to United Way's mission

Responsibilities

- Chairing employee campaign
- Recruiting volunteers, committee and canvassers
- Training these volunteers
- Developing a campaign plan
- Liaising with United Way staff
- Monitoring progress
- Analysing results, identifying potential or challenges and working on solutions
- Supplying information, updates and results to United Way office
- Returning completed report envelopes to United Way office by mid November
- Attending Recognition event in March



Campaign Basics



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. The 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 more than \$3.1 million.

Since 1941, the United Way has worked to strengthen lives by bringing together the financial resources of the region – business, labour, individuals, government, and funders - in support of a network of social service and health agencies. Through these agencies and their programs, people found help and, in many cases, opportunity for a better life.

Funding Philosophy

The United Way will consider funding programs and services that meet the intent of our Funding Philosophy.

Funds will be allocated to support local human care needs through programs and services in the City of Kingston and the counties of Frontenac, Lennox & Addington.

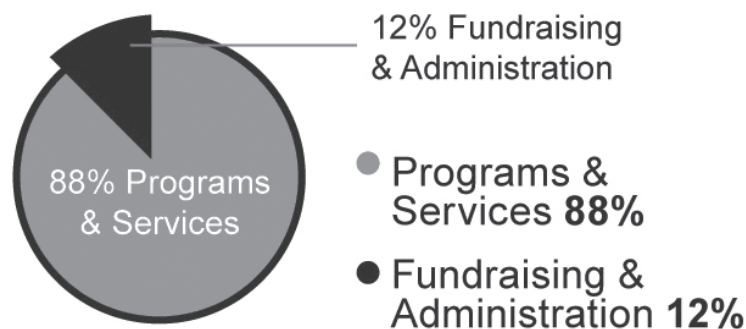
Recognizing the uniqueness of the communities in the area we serve, our United Way will strategically invest in services that:

- will enhance the capacity of people to care for themselves and one another
- give people the opportunity to have input into decisions that affect them
- are accountable, inclusive, responsive to the needs of the communities, and eliminate barriers that prevent people from accessing services
- are preventive, growth-oriented and directed to strengthening communities and individuals of all ages
- will help people live with hope, dignity and a sense of belonging

United Way is accountable to you and the community

At the 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%.

United Way provides opportunities for people to care for one another by meeting urgent needs and addressing root causes.

- We make a difference every single day (individual level);
- We're working to address the root causes of social issues (community-wide)
- We bring together people from all walks of life to build a better community (mobilization)

United Way's Community Investment Fund provides funding to improve social conditions.

In the short-term:

- Be meeting immediate needs through stable funding to a network of frontline agencies
- By providing grants to meet changing needs

In the long-term:

- By addressing the root causes of social issues

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, and 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.

Community Investment Fund

The 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.

Your one gift to the United Way Community Investment Fund will reach every sector of the community and address multiple needs throughout KFL&A.

Impact of Your Donations

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.*

Three Steps to a Successful Workplace Campaign

Plan:

- Learn about United Way
- Build your team
- Analyze & set goals
- Develop a campaign plan
- Plan a leadership campaign
- Prepare
- Develop a promotion plan

Execute:

- Promote
- Kick-off
- Canvass
- Special events
- Manage & monitor

Wrap-up:

- Follow-up
- Share results
- Thank everyone
- Evaluate results

Find out how to use these steps to run a winning campaign!

As you begin to plan for your United Way Campaign, we want to ensure that you have the very best tools and information to help you. Here are some steps that are part of every successful workplace campaign.

1. Plan

1.1 Learn about United Way

Objective

Gain an understanding of United Way serving Kingston, Frontenac, Lennox & Addington to build your own involvement and commitment and to be able to respond to questions and concerns

Actions

- Attend an Employee Campaign Coordinator Best Practices Session
- Meet with your United Way Staff Partner or Loaned Representative
- Review this guide, our brochure and other promotional material
- Visit the United Way website - www.unitedwaykfla.ca
- Invite someone from United Way to attend your first committee meeting
- Ask for a customized agency tour or attend our Seeing is Believing tour
- Request an agency speaker for a staff meeting

1.2 Build your team

Objective

Share the work and build a campaign team that is reflective of your organization

Actions

- Start recruitment early
- Seek out experienced volunteers as well as new ones
- Include representatives from each department and location; union and management
- Leverage support from senior management and union leaders to rally new volunteers and resources to involve them in campaign activities, like kick-off and wrap-up events
- Use the committee descriptions in this guide to fill specific positions and help volunteers understand their roles
- Recruit a Leadership Chair if you have 5 or more Friends or Leaders of the Way

1.3 Analyze & set goals

Objective

Build on previous successes by setting realistic goals

Actions

- Review history of earlier campaigns
- Ask your staff partner for assistance with a customized analysis session
- Identify strengths and develop key strategies
- Work with committee to establish goals
- Goals can be financial and/or can be based on participation rates, gift or 100% canvass

1.4 Develop a campaign plan

Objectives

Communicate a common objective to coordinate your team
Develop timelines and milestones to monitor your campaign

Actions

- Identify tangible steps to achieve goals
- Consider other key dates for your workplace
- Avoid dates when employees are away like hunting season or new systems in the workplace, community events
- Establish a timeline or critical path (samples are provided in this guide)
- Share your plan with senior management and union leaders to obtain early buy-in

1.5 Plan a leadership campaign

Objective

Grow your campaign exponentially through this high-growth opportunity by retaining and increasing the number of donors who give \$1,000 or more

Actions

- Review list of who currently gives as a Leader
- Identify opportunities for people to give at Leadership level
- Start with Friends of the Way (\$500-999) and new hires
- Identify a Leadership Chair or select a committee member to ensure Friends and Leaders are not missed
- Ensure all Friends and Leaders are asked

1.6 Prepare

Objective

Ensure you have all that you need to run a successful campaign

Actions

- Ensure that you have your campaign kit with materials from United Way
- Personalize your pledge forms – United Way can do this for you or you can do it yourself
- Order other campaign supplies (balloons, banners, video, etc. - see list in this guide)
- Schedule CEO, middle management, union leaders for kick-off
- Schedule United Way representatives and agency speakers to give presentations
- Recruit and train canvassers – 1:15 is the recommended employee to canvasser ratio

1.7 Develop a promotion plan:

Objective

Build awareness of United Way: the issues in the community and the impact donations make

Actions

- Utilize all communication tools in the weeks leading up to the campaign to reinforce the impact of United Way and the difference their contributions make to family, friends and neighbours
- Use United Way impact statements or testimonials to reinforce the value of all donations
- Pick agency stories that work for your workplace and add them to emails, notice boards, posters
- Organize a custom agency tour to increase awareness among canvassers and committee members

2. Execute

2.1 Promote

Objective

Make everyone aware of upcoming campaign, including events and dates for canvassing

Actions

- Promote your upcoming campaign using emails, posters, intranet
- Let employees know who has volunteered as canvassers and committee members
- Use your workplace notice boards to post letters of support from management and unions
- Request an agency speaker to speak at a meeting or training session that has already been scheduled
- Use events to increase awareness using posters, banners, impact statements, agency speaker
- Hold information sessions

2.2 Kick-off

Objective

Mark the start of your United Way Campaign

Actions

- Provide awareness raising opportunities such as: presentations by United Way representatives and/or agency speakers
- Agency tours
- Provide everyone with a donor information brochure
- Run free or low-cost special events that build awareness and morale

2.3 Canvass

Objective

Provide all employees with an opportunity to help build a stronger community in KFL&A

Actions

- Canvass face to face wherever possible; peer to peer canvassing is a must
- Blitz campaigns are the most efficient and effective way to get the most dollars in a short timeframe
- Ensure that everyone receives a pledge card
- Have your Leadership chair follow up with people who gave \$500 or more
- Ensure everyone is asked to support United Way
- Keep it short – two or three weeks is the recommended maximum regardless of size of your workplace

2.4 Special events

Objective

Boost morale, foster teamwork and have fun!

Actions

- Pick fun events before canvassing or to highlight the blitz
- After the canvassing is complete, run fundraising special events if you choose to
- Participate in United Way community events – Commando Challenge, Kick-off, Touchdown

2.5 Manage & monitor

Objectives

Ensure you are aware of any red flags

Keep thermometer rising

Actions

- Monitor your progress; follow up with canvassing team
- Have one committee member responsible for monitoring the progress of your campaign
- Provide ongoing communication of results to both the campaign team and co-workers
- Securely handle funds and pledge cards . As soon as pledge cards are returned, remit them to United Way; you don't have to wait until the end of your campaign
- As soon as special event funds come in, remit them to United Way

3. Wrap-up

3.1 Follow-up, Share results

Objectives

Ensure every employee has had the opportunity to participate
Announce achievement

Actions

- Follow up with employees who may have been away during the canvass
- Develop a system to track those who have not been canvassed; personalized pledge cards make this easy
- Communicate the final results – this is a simple and effective way to recognize contributions as a group

3.2 Thank everyone

Objectives

Recognize contributions and build loyalty
Maintain positive, life-long relationships with United Way

Actions

- Thank committee members, canvassers and other campaign volunteers
- Thank senior management and labour representatives
- Thank donors (the United Way office will thank donors giving \$500 or more and will send receipts and a thank you note with every cash/cheque/credit card donations; however the office is not in a position to thank every single donor)
- Thank suppliers for incentive prizes
- Think of creative ways to say thank you (parties, gifts, letters, email, presentations, chocolates, cards) to communicate your thanks
- Attend United Way's Workplace Volunteer Awards and Recognition event in March - see pg. 22 in this guide for a listing of Awards
- Arrange for someone from the United Way to present the award at a staff meeting

3.3 Evaluate results against goals and strategies

Objective

Lay a foundation for an even more successful campaign next year

Actions

- Compare your results with the goals you set
- Identify what worked and what didn't work
- Engage your successor in the evaluation process to build their knowledge and commitment to building on strengths

Sample Workplace critical path				
PLAN		Activity	To be completed	
			By When	By Whom
	Learn about United Way	Agency Tours		
		Agency Speakers		
		UW staff partner/materials		
	Build your team	Identify committee structure		
		Committee Recruitment		
		Committee Meeting/Training		
		Leadership Chair		
	Analyze & set goals	Partnership analysis		
		Review history		
		Re-visit strategies and goals		
		Areas of potential - retirees/new hires/ leaders/friends		
	Develop a campaign & leadership plan	Kickoff & touchdown		
		Payroll Canvass:		
		Develop timeline - 2 week canvass		
		Recruit site coordinators		
		Recruit canvassers		
	Prepare	Preprint pledge cards		
		Endorsement from CEO/unions if applicable		
		Package materials		
	Develop a promotion plan	Agency Speakers		
		Canvasser training		
EXECUTE				
	Promote	Emails, posters, intranet, notice boards		
	Kickoff event	Barbecue/ Event/ Dress down...		
		Agency speaker		
		Promotion of kickoff		
	Canvass	Canvassing by shift and department		
		Retiree canvass		
		Leadership canvass		
		New Hires		
	Special Events	Special Events		
		Decide which to keep		
		Timeline events so they don't interfere with canvassing time		
	Manage & Monitor	System/procedure to collect envelopes		
		Tracking of employees to be canvassed		
		Follow up with canvassers/team leaders		
WRAP-UP				
	Follow-up & share results	Follow up with employees who were away Communicate final results		
	Thank everyone	Thank committee		
		Thank canvassers		
		Announce results - thank donors		
	Evaluate results	Compare results to goal		

Options for Giving

Employee payroll deduction plans through workplaces are the easiest way to give to the United Way. In fact, 84% of our campaign total is achieved from individuals. Other options for giving include:

- Monthly donations from credit cards or chequing accounts (note that these are processed on the 15th of each month beginning in January).
- One-time donations by cash, cheque or credit card.
- 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, however, the donor receives a charitable tax receipt for the full market value of the security.
- Become a Leader of the Way by giving \$20 per week (\$1,000 per year) or Friend of the Way by giving \$10 per week (\$500 per year). Leadership gifts are recognized at the following levels:

Heroes	\$365 - 499
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 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.

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	
Your gift of	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
\$1000	\$363.38	\$636.62	\$420.15	\$579.85
\$5000	\$1,969.78	\$3,030.22	\$2,276.54	\$2,723.47

Two-week model campaign

Off campaign season (January to August) Activities

- Run a newsletter item about United Way's work in the community
- Participate in Day of Caring (June). This is a great way to recruit campaign volunteers. You can share the stories and photos in your newsletter or website
- Attend a Seeing is Believing Tour or request a custom tour to see the impact of your donations
- Talk to your United Way staff partner about other ideas that suit your workplace
- Attend an Employee Campaign Best Practices session prior to your campaign launch date

8 to 6 weeks before your campaign starts

- Attend an Employee Campaign Workshop if you haven't already

6 weeks before your campaign starts

- Confirm CEO and Labour leaders availability for kick-off and wrap-up events

3 weeks before your campaign starts

- Start advertising campaign – let your workplace know the campaign is coming
- Promote using: posters, email, intranet, notice boards, memos, etc
- Introduce your campaign committee members and canvassers
- Let your workplace know about the incentives you will have available
- Start building awareness of United Way serving KFL&A – “Did you know...?”
- Share stories from colleagues who have benefited from United Way funded programs and services
- Promote upcoming events at your workplace

1 week before your campaign starts

- Train your canvassers – this may require more than one session depending on size of group
- Provide awareness raising opportunities - agency tours, guest speakers
- Continue campaign promotion
- Leadership campaign event (breakfast, lunch, wine and cheese, agency tour, etc)
- Attend the United Way Campaign Kick-off breakfast in September to find out the community goal

Week 1 - Execute

- Start the week with a kick-off
- One-on-one, peer-to-peer canvass

NOTE: Hold off on fundraising special events until the majority of your pledge card donations are complete.

Week 2 – Execute

- Continue canvassing. Re-canvass anyone who has not returned a pledge card/completed their link
- Remit campaign envelope

1 to 2 weeks post Campaign- Wrap-Up

- Thank donors and volunteers
- Evaluate results against goals and strategies

Sample Two-Week Campaign Calendar

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
	Start advertising campaign- let your workplace know the campaign is coming		ECC & Leadership Chair attend Campaign Training Workshop			
<u>Pre-Campaign</u>						
	Campaign Promotion: Promote up coming events in your workplace	Train Canvassers	Leadership Presentation. Held 1-week prior to Kick-off to "set pace" and build momentum			
<u>Campaign</u> Week 1		Campaign kick-off! Agency speaker CEO remarks			Casual Day - Early bird draw for pledge forms collected	
	Campaign Representatives personally deliver pledge packages and speak with each employee					
Week 2	Continue canvassing for the week			Campaign Events Chili cook off Bake sale VIP parking spot raffle draw Collect pledge forms	Wrap-up Events Announcements and thank-you	
<u>Post-Campaign</u>		Collect last of the pledge forms -follow up with employees who were away		Submit pledge cards and event collars to United Way. Don't forget required copies to your payroll department		

Kick-offs are best scheduled for Tuesday, Wednesday or Thursday to attract as many employees as possible and so as not interfere with flex days.

Resources/Tools to help you succeed

United Way staff partner: is a professional, highly skilled individual who will provide you with all the support you need.

Loaned Representative: is an individual loaned to the United Way by an organization for the three month duration of the campaign. This person is an extension of the United Way staff and will work closely with you and your staff partner.

Training/Orientation sessions: UW staff and loaned representatives bring with them their skills and expertise to help you and your campaign exceed goals. They will share proven strategies and offer tips, best practices and easy to use ideas to help you succeed.

Agency speakers: Volunteers, clients and staff of agencies who will share personal stories to help your employees appreciate how important their support is.

Seeing is Believing Tours: Board the bus with us to see the impact the United Way serving KFL&A has in our community. The tour provides volunteers with an opportunity to see their donations at work in the community. Participants of tours saw an average increase of 35% in the campaigns at their workplaces compared to 6% in other workplaces!

Customized agency tours: If you cannot make one of our pre-scheduled bus tours, let us know and we will design a tour specifically for you. We can do walking lunch tours, or longer morning or afternoon tours. Whatever fits your timeline!

Presentations: Leaders in the community will come out and assist you with presentations to key groups during management meetings, staff meetings, etc. This is especially helpful when you are promoting the value of leadership gifts, which helps all campaigns grow.

Presentation materials: Videos, CD's, powerpoint presentations are available upon request. Banners, signage are available on loan from the UW office.

Print materials: pledge forms, brochures, directory of funded services, posters, newsletters are available, free of charge, to help you promote the value of the United Way.

Training guides: ECC and canvasser guides offer you ideas and best practices, including tips and strategies that will help you grow your campaign. These guides are also available on the United Way website at www.unitedwaykfla.ca.

Partnership Analysis/Strategic consultation session: To facilitate the committee's planning process and help you build on your successes and counteract challenges. (PA's helped grow campaigns 36-44%)

Media liaison: UW will assist you in promoting your events through our weekly newsletter (reaching over 350 workplaces) and will connect you with media contacts in the community.

Recognition: Canvasser certificates, pins, etc. are available through your staff partner/loaned representative on request.

Frequently Asked Questions: UW staff and loaned representatives are a great source of information about the United Way, health and social services in KFL&A and fundraising.

Frequently Asked Questions

Why is my donation best utilized by giving it to the United Way serving KFL&A Community Fund?

The United Way serving KFL&A Community 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 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. Our audited financial statements show our fundraising costs to be 12 percent including administration. The average fundraising costs for non-profit organizations in Canada are between 20 & 50%.

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, The 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. 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 and your partner can 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 the 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 the United Way?

There are many agencies that the 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 2009 campaign through payroll deductions, your pledge is deducted from your pay in 2010 and the funds will be sent to the agency in the spring of 2011.

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.

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 preauthorized payment.

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. The United Way serving KFL&A does not trade, sell or distribute donor information.

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.

What is 211?

Dialing 211 will connect you instantly with vital information related to community, social, government and health services. The service works closely with your local United Way to ensure residents have access to information and services.

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 United Way staff partner or Loaned Representative for any information you might need.

United Way serving KFL&A Workplace Volunteer Awards Criteria

Participation Awards based on employee contributions

For workplaces with more than 6 employees

Platinum	a minimum 90% participation and \$100 per capita
Gold	a minimum 75% participation and \$75 per capita
Silver	a minimum 65% participation and \$65 per capita
Bronze	a minimum 50% participation and \$50 per capita

For workplaces with 3 to 5 employees

Spirit	a minimum 100% participation and \$50 per capita
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Leadership Awards based on gifts of \$1,000 or more.

Ruby	workplaces with more than 40 Leaders of the Way
Emerald	workplaces with 25 to 39 Leaders of the Way
Diamond	workplaces with 10 to 24 Leaders of the Way
Sapphire	workplaces with 5 to 9 Leaders of the Way

Special Awards

Keystone Awards are given to employee workplace campaigns that raise \$250,000 or more through corporate, employee and event donations.

Limestone Awards are given to employee workplace campaigns that raise \$100,000 to \$249,999 through corporate, employee and event donations.

Sandstone Awards are given to employee workplace campaigns that raise \$50,000 to \$99,999 through corporate, employee and event donations.

Cornerstone Awards are given to workplace campaigns that raise \$25,000 to \$49,999 through corporate, employee and event donations.

Most Improved Awards are given to employee campaigns with the greatest percent increase in each sector.

Freshman Awards are presented to workplaces that have run an employee campaign for the first time.

Team Spirit Awards are selected based on committees that demonstrate team effort in the application of best practices.

Labour Awards are given to union locals that increase their support and their participation in workplace campaigns.

Spirit of Community Awards are given to organizations that reached out to the broader community, raising significant funds for the campaign.

Campaign Events

Events can be an important part of your campaign. But...**It's All About Timing!**

An ideal campaign has one or two events to create enthusiasm and build momentum. These may include a kick-off, early bird draw, and a final draw. ***They should not take away from the employee pledges and are best scheduled after the pledge forms have been distributed.*** To help with your special events, United Way has supplies available for your workplace to help promote your event, e.g. posters, aprons, balloons, etc.

Special Events should:

- Create awareness
- Motivate employees to participate
- Promote team spirit
- Raise funds

Special Events should be:

Limited in number – Special events can be time consuming for you and your committee members. And, they often result in low returns on participation. Having fewer, more exciting events is always a better choice.

Fun and free - Employees do not wish to be asked to donate repeatedly throughout the campaign. Events that cost money, e.g. silent auctions should always be held at the end of your campaign.

Awareness builders – The best special events help raise awareness about United Way and your employee campaign.

Before planning your event go through this simple exercise.

What: See what will be most effective in your workplace. Shortlist a few events from this guide or call the United Way for ideas of what works in similar workplaces.

When: Time your events carefully so they do not interfere with the payroll campaign.

Where: Once you've decided which events you will run, work out how much space you need for your event. There may be opportunities within the community for donated space.

Why: Work with your committee or your colleagues and decide whether the events are intended for fundraising, to enhance awareness of the campaign or to build team spirit and morale within the workplace.

How: Planning is essential for events. Give yourself lots of extra time to ensure you cover all the details. Remember, events are resource intensive but can be a lot of fun!

Tips to Successful Events

- Recruit an events chairperson to be part of your campaign committee.
- Involve as many employees as possible.
- Use campaign videos, promotional banners, posters etc. to help promote your event. Ask your staff partner for any supplies you need.
- Communicate with management well in advance to ensure that events do not interfere with any restrictions or guidelines the company may have.
- Have a plan “B” ready for things like weather or poor ticket sales.
- Make sure you that you are aware of all government guidelines regarding both solicitation of donations/prizes and also receipting.

Ideas for Events

Miniature Golf Tournament

Set up workplace as a mini golf course incorporating hallways, staircases, swinging doors, elevators, etc. Employees pay an entry fee to compete either individually, or on teams over a lunch hour.

Employee Cookbook

Solicit favourite recipes from the staff. Ensure there are a variety of different types of dishes Compile all recipes into a cookbook to be sold to employees, family and friends.

A Day Off with Pay Raffle

Ask upper management if they will agree to pay an employee’s wage for a day that he/she does not work. Raffle tickets are sold to employees, with the grand prize being a day off work.

Rent a Boss

Hold an auction where employees bid for services provided by managers (car washes, office clean up, cook and serve a gourmet meal, golf buddies, worker for an hour...).

Dressed This Way for United Way

Employees pay a designated amount to dress-down on Fridays. Stickers are available from the United Way office.

Office Olympics

Employees pay an entry fee to participate in various office events – pencil toss, human paperweight, computer quiz, office chair relay. Managers could issue challenges to other departments and serve as team captains or judges.

Parking Spot Raffle

Raffle off a “choice” parking spot from work i.e. closest to the entrance, President’s/CEO spot. Have a sign indicating “United Way winning spot parking only.”

Bake Sale

Ask employees to donate baked goods. Requires a suitable location that is easily accessible for all employees and/or the general public.

Car Wash

Set-up car wash in convenient location for employees and/or general public with easy access to an appropriate water source.



Enhancing Your Campaign



Increasing Participation

Increasing participation begins at the planning phase of your campaign. Use the checklist below to see whether you are on track to increase participation this year!

Planning:

- A partnership analysis has been scheduled to review previous results and identify areas of opportunity, strengths and challenges.
- Analysis results have been used to determine which areas need to be focused on to attract new donors.
- Events are timed to protect the canvassing period.
- An awareness plan is in place including group information sessions, agency tours and/or agency speakers
- There is a plan in place to thank all donors, volunteers and employees to ensure high participation in the following year.

Recruitment:

- Committee members are representative of the structure, make-up and locations of the organization.
- A Canvasser Coordinator has been recruited on the committee to ensure that sufficient canvassers have been recruited, trained and mobilized and every employee is “asked” to participate.
- An Events Chair has been named who will oversee all campaign events including awareness opportunities and fundraising events.
- A Leadership (or Friendship) Chair has been appointed to canvass Leadership donors and senior management.

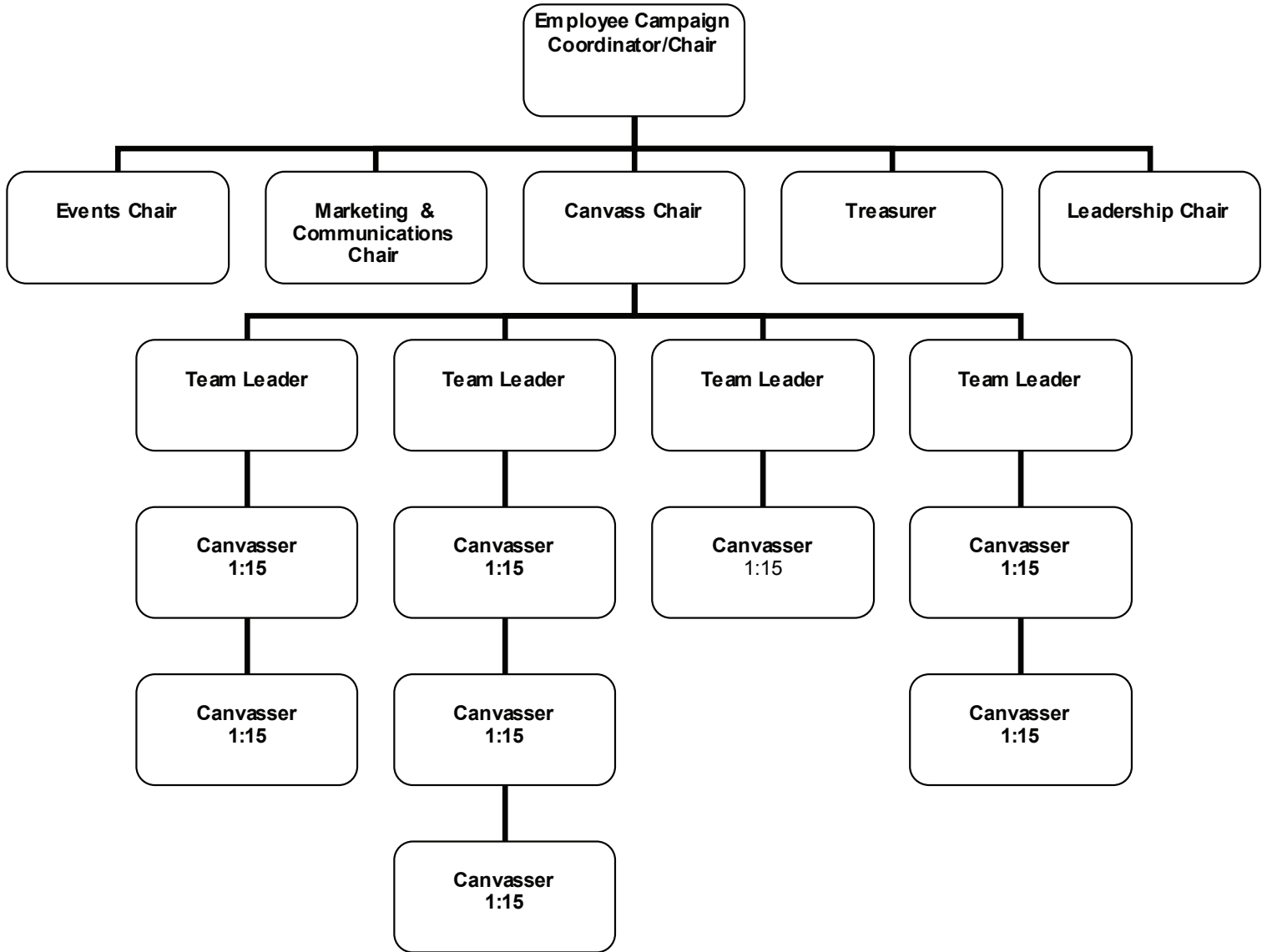
Workplace Canvass & Support:

- Management and union leadership supports campaign and provides visible support along with adequate time for volunteers.
- A participation goal has been set and the number of donors required to achieve this goal has been identified
- The United Way staff/loaned representatives have provided a customized training session for the committee and canvassers.
- Pledge cards have been personalized.
- Payroll deduction is being promoted as the easiest, most convenient way to give.
- The most effective canvassing techniques have been identified and a plan has been developed to approach all employees, including retirees, part-time workers, shift workers, field workers, new hires, etc.
- A prize/draw/incentive is being offered to encourage strategies to increase participation, including participation awards to areas/departments that reach a certain level of participation.

Campaign Committee Structure

The workplace committee is the key to fundraising for the community. The ECC and committee members work closely with the United Way staff partner/loaned representatives to ensure that the UW canvass runs within established timelines and that workplace campaigns utilize strategies and best practices.

Sample Committee Structure



There are lots of variations in size and structure of a workplace campaign team. The essential components are:

- One individual who is designated as the liaison between the United Way and the workplace.
- Representation on the committee from different areas of the workplace including any different sites, different departments, job category and Union representation if applicable.
- Optimum canvasser/employee ratio is 10 or 15 employees to be canvassed for each canvasser.
- Often canvassers report directly to their canvass chair but Team leaders are recommended for all departments if the size of workplace warrants it. This is to ensure that the Committee member responsible for the canvass can streamline communications and follow-up to larger numbers of canvassers more efficiently.

Committee roles, responsibilities and guidelines

Position	Responsibilities	Timelines
ECC	<p>The ECC is recruited by the CEO of the organization and is the primary liaison with United Way. This individual is responsible for ensuring that the UW workplace campaign is managed and resourced effectively, with established plans, timelines and updates.</p> <ul style="list-style-type: none"> • Plan & Timelines Confirmed • Committee Recruited • Organizing training/orientation of committee • Setting realistic but challenging goals – financial as well as participation • Monitoring all aspects of campaign 	<ul style="list-style-type: none"> • April/May • May • May/June • May/June • Ongoing
Committee		
Events Chair	<p>The Events Chair is recruited by the ECC and is responsible for all events organized during the UW campaign. Some of these events are fundraisers while others may be awareness events. The Events Chair will ensure that events do not impact on the workplace canvass.</p> <ul style="list-style-type: none"> • Identify events for this year • Ensure events are timed to protect canvass • Logistics for events • Liaise with UW re: license requirements, materials, etc. • Recruitment of volunteers for events 	<ul style="list-style-type: none"> • May • May • May • June • June
Marketing and Communications Chair	<p>The Marketing Chair is responsible for communications and information pertaining to the UW workplace campaign.</p> <ul style="list-style-type: none"> • Marketing Plan, developed in consultation with ECC and UW staff • Coordination of materials, newsletters, displays, posters, banners, etc. • Coordinate agency speakers – UW and Team leaders • Kickoff of workplace campaign and wrap-up • Communicate final results to workplace employees 	<ul style="list-style-type: none"> • May • July • Aug • Sept – Nov
Canvass Chair	<p>The Chair, Workplace Canvass is a key position on the committee and is responsible for canvassing, which makes up the majority of UW fundraising. The Chair recruits team leaders who, in turn, recruit canvassers.</p> <ul style="list-style-type: none"> • Recruit team leaders • Train/orient team leaders • Ensure timelines are communicated • All materials (preprinted pledge cards, brochures, banners) from UW • Liaise with Treasurer 	<ul style="list-style-type: none"> • May • June • June • Aug • Sept-Nov

Treasurer	<p>The Treasurer is responsible for counting all cash and payroll deduction amounts, monitoring pledge cards and events proceeds and reporting these results to the ECC and/or UW</p> <ul style="list-style-type: none"> • Develop process for collecting and verifying envelopes • Receive envelopes from team leaders (and/or canvassers) • Track and monitor results • Communicate results to ECC & committee • Verify envelopes • Point person for UW to verify envelopes • Ensure all cash donations are forwarded to UW prior to end of campaign (to ensure receipting as per CRA rules) 	<ul style="list-style-type: none"> • Aug • Sept-Nov • Sept-Nov • Sept-Nov • Nov
Leadership Chair	<p>The Leadership Chair is responsible for implementing the key strategy in this year's campaign, i.e. leadership giving. Over 25% of the campaign is raised from a small group that makes up 4.5% of the employees – the leadership champion's responsibility is to ensure that these donors are appropriately asked and followed up with and that presentations are made to encourage people to think about giving at Friends or Leaders levels.</p> <ul style="list-style-type: none"> • Follow up with leadership donors • Liaise with UW regarding thank you letters, stewardship letters, etc. • Working closely with UW and ECC, organize presentation(s) regarding leadership giving 	<ul style="list-style-type: none"> • Sept-Nov • Oct-Nov • Sept-Nov
Workplace canvass		
Team leaders	<ul style="list-style-type: none"> • Recruit canvassers • Identify and breakdown lists by dept. or unit for canvassers • Work with UW (and Chair Workplace Canvass) to organize training/orientation • Distribute materials to canvassers • Ensure canvass is occurring within timelines established by ECC & committee • Monitor results and liaise with Treasurer 	<ul style="list-style-type: none"> • July • Aug • Aug • Aug • Sept-Nov • Sept-Nov
Canvassers	<ul style="list-style-type: none"> • One canvasser for every 10 employees • Attend training/update/orientation session • Pick up pledge cards/brochures for those being canvassed (plus some extras) • Make the ask within timelines and forward pledge cards to Team Leader or Treasure (as defined) 	<ul style="list-style-type: none"> • Aug • Aug • As per plan

Multiple Location Campaigns

When building your campaign team, remember to ensure all levels and locations of your organization are represented on your employee committee. Experience shows that it is essential that each location has its own campaign.

By including a representative from each location, you will:

Ensure all locations have input into the campaign plan

Avoid delays in relaying campaign information back to the various locations

Ensure all employees have an opportunity to learn about and contribute to United Way

Some basic campaign strategies for each location:

1. *Recruiting a location coordinator:* responsible for recruiting, training and recognizing canvassers, ensuring all employees are canvassed and monitoring campaign progress.
2. *Recruiting a location campaign team:* to assist with implementing the campaign.
3. *Recruiting and training canvassers:* coordinators and canvasser's will need to familiarize themselves with the United Way; they may want to organize an orientation session and/or adopt a "swat team" approach.
4. *Canvassing:* locations may have shift workers, part time employees or employees who rotate from one location to another to fill vacant positions. The canvassers guide covers face to face canvassing, group canvassing and combinations of these strategies.
5. *Communications & Publicity:* A challenge often faced by multiple location campaigns is how to make employees at all locations feel part of the campaign. To avoid isolation, ensure that information is relayed back to location employees regularly, including dates, timelines, campaign theme, results, events, etc. Sometimes a friendly competition between the locations helps, especially if the results are regularly communicated.
6. *Local content:* If the location is in another community, coordinate with your local United Way to ensure the location United Ways provide information, brochures, speakers, support, to the location coordinator.
7. *Reporting and Monitoring:* It is crucial that employees understand the procedures and contact names for returning pledge cards. A system needs to be developed and pledge cards can be returned to location coordinators, canvassers, central payroll department... Location coordinators may wish to meet at least once during the campaign to discuss any concerns and/or problems and to re-visit strategies to ensure that they are working.
8. *Recognition for location's campaign team:* This could be done in a variety of ways – CEO hosts a luncheon/reception for all head office and location volunteers, CEO attends location meeting with location coordinators to thank canvassers, canvassers receive a personalized thank you letter from the ECC, CEO or location coordinator.

Benefits of a One Day Blitz

Average participation rate for organizations using this style is 80%
Most effective and time-efficient method
Great motivational tool for all employees fostering team work and team spirit
Less stressful for canvassers as they work in teams (buddy system)
Majority of the campaign is finished within a very short timeframe with only follow-up canvassing and special events to follow

5 Steps to a Successful Blitz Campaign

- 1. PREPARATION:** This is the most important step to realizing a successful Blitz campaign. The campaign will run smoothly if you have invested the appropriate amount of time to this step and have all of the pieces of the puzzle in place well in advance of the campaign. Some of the things you should do to be well prepared are:
 - Segment your workplace in advance by physical department, job type, union or shift. Decide which areas will benefit from the blitz and which would benefit more from a different style of campaign.
 - Orientation for the Committee and Canvassers is crucial. All volunteers need to be aware of the process and schedule for the day and also aware and comfortable answering questions about United Way and the programs that they support.
 - Make sure that you have the support of management and union leaders in place early.
 - Prepare personalized pledge forms or a canvassing list to ensure all employees are accounted for. This allows for easier tracking for follow-up canvassing.
 - Develop awareness materials including letter/memo either from the committee, management or a joint memo from both.
- 2. PROMOTION:** The most important thing to keep in mind is to make sure that all employees are well aware in advance of the blitz that it will be taking place, when it is happening and what will be expected of them on the day of the blitz. There are several critical steps you can take to ensure that this communication has been successful:
 - A letter of support for the upcoming campaign should be sent to all employees from management well in advance of the campaign urging them to participate. This could also be a joint letter from management and labour leaders and/or the committee. Letters can be sent to all staff or posted on Staff bulletin boards or as part of a newsletter if the company produces one.
 - Information regarding the logistics of the Day or Week of the Blitz also needs to be communicated to the work population so that they are aware of the schedule of events for that day. This information can be distributed at staff meetings, through the company newsletter, union meetings, staff bulletin boards, broadcast fax or email.
 - Posters promoting the upcoming campaign should be visible throughout the workplace for the week prior to the campaign.
 - A reminder that works well the day before the campaign is some form of a hand out as employees arrive for their shift. For example, volunteers stand at the entranceway and hand out United Way mints or cafeteria cookies to employees reminding that tomorrow is the Blitz, as they arrive at work.
 - Offer prizes, incentives or draws to encourage attendance at blitz sites. It is suggested that you also communicate the idea that any returned pledge form whether they are giving or not is eligible for prizes.

- 3. PRESENTATION:** This is the portion of the blitz where employees have the opportunity to learn about the United Way for themselves. Awareness is very important so that donors are educated about where their gift is being directed and just how important their support is to the overall strength of their community.

 - Agency speakers are the most effective way to bring the United Way message and a personal connection to the programs and services that are funded.
 - A brief message from management and/or the campaign coordinator can help to supply more information regarding the process, how their particular workplace can play a strong role in the community and why they feel it is an important campaign to support.
 - Agency materials could be readily available.
 - United Way staff could be present to help answer any questions that the canvassers/volunteers have trouble answering.

- 4. CANVASS:** How you choose to arrange for the opportunity for employees to fill in their pledge forms can take several different forms. The recommended model is to arrange for a room where canvasser volunteers work in shifts and all employees are given time to go there and to fill in their pledge forms. There are a couple of things you need to do to ensure that this model works:

 - Election style booth can be set up to ensure privacy.
 - Volunteers are well prepared to answer questions both about how the form is to be filled out but also any other question employees may have about donor choice, etc.
 - Employee lists must be available to ensure accurate monitoring of which employees have filled in their forms.
 - Employees have been assured by management that they will be given and encouraged to take the time to participate.

- 5. FOLLOW-UP:** This is a crucial step to ensure that you have maximized your potential for participation. Accurate employee lists and monitoring during the canvass is very important. All canvassers are responsible for identifying which employees within their segment of the workforce who have not yet participated.

 - Canvassers should be given firm timelines on the follow-up portion of the campaign.
 - Make sure that you communicate how the campaign is doing to the entire workplace. People enjoy knowing that they have participated in a successful campaign.
 - Thank everyone for their time, for their participation and for their generosity. This can take the form of personalized thank you's from each canvasser to those employees within their segment, or a communication from the committee to the entire workforce or both. This is the most important step in the process.

Checklist to a Successful Blitz Campaign

- Meet with your United Way partner and plan the logistics for your blitz.
- Segment your workplace and target those areas of the workforce most likely to respond to this style of campaign. Make alternative plans for the other segments.
- Secure management support for the campaign and the time necessary for employees to attend the presentation and have ample time to make their pledge. Send out a letter of support from management and Union leaders encouraging employees to participate.
- Promote the campaign in advance with lots of visible posters, email communication, company newsletter, staff bulletin board, etc.
- Preprint pledge forms for easy tracking and follow-up or generate accurate employee lists for each canvasser.
- Invest time in the training of canvassers to ensure that they are comfortable with both the process and communicating the United Way message.
- Plan to include videos, agency speakers and messages from the management, union leaders or campaign coordinator in your presentation to the staff the day of the blitz.
- Remind co-workers the day before the blitz by having canvassers greet all employees at the door with mint, cookie or sticker to remind them that tomorrow is the day.
- Prepare the pledge room in advance with a clear schedule for canvassers, a voting booth area for filling out the forms, posters and other agency material and employee lists for the canvassers to cross off names as the employees fill in their forms.
- Provide prizes and incentives if possible including all participants whether they choose to donate or not.
- Provide ongoing communication to the workplace regarding how the campaign is doing.
- Thank everyone for their time, participation and generosity.

How to Run a Successful Campaign

<p>The #1 reason that people do not donate is because they have never been asked.</p>
<p>Emphasize personal donations 78% of all United Way funds are derived from payroll deduction</p>

Steps to a simple, quick campaign:

- Check your package to make sure that you have everything that you need. There should be enough pledge forms and brochures for every employee.
- Ask your United Way contact for assistance and information about United Way, agency speakers, promotional materials, posters, etc.
- Schedule a coffee break, luncheon, or other gathering; or use existing meetings at shift changes, safety meetings, etc.
- Pre-promote the gathering to make sure that everyone knows using staff bulletin boards, broadcast fax or email. Posters promoting the upcoming campaign should be visible throughout the office for the week prior to the campaign/event.
- **Make sure that all employees** and shifts are included in your campaign.
- Have your presentation **BEFORE** any events that you may be planning for maximum return.
- Request an agency speaker through the United Way or show the United Way DVD. Workplaces that invited an agency speaker increased their campaigns by 17%.
- Hand out the pledge forms immediately after the presentation and ask for them to be returned the next day.
- Have an incentive draw to encourage quick return of the forms.
- Don't forget to follow up with those who haven't returned their forms.
- Once you have collected your pledge forms, put them in the enclosed envelope and call your UW representative to pick them up.
- The campaign wraps up mid-November so plan ahead.

You will want to recruit a person from each department/shift to help you with the planning and follow-up

It's that easy!!!

Events

If you choose to have events, make sure to do them **AFTER** you have collected all your pledge forms. Here are some ideas that have been successful in the past:

- BBQ's, pizza days, bake sales
- Chili contest
- CD/Book exchange
- Plant sale
- Rent-a-boss
- Jeans day/ dress to a theme day (Hawaiian etc.) / Dress differently
- Office Olympics
- Mini golf in the office
- Auction off preferred parking spots (by the month or the year)

Canada Revenue Agency Guidelines for Receipting

General Rule:

Donations that are receiptable are considered gifts. A gift is a voluntary transfer of property without valuable consideration. A gift must meet the following three conditions:

1. Some property, usually cash, is transferred by a donor to a registered charity;
2. The transfer is voluntary; and
3. The transfer is made without expectation of return. No benefit of any kind may be provided to the donor, except where the benefit is of normal value.

Donations that are RECEIPTABLE:

1. Direct cash, credit card and cheque donation - a receipt is prepared by the United Way
2. Payroll deductions - generally receipted on employee's T4 slip by employer

Donations that are PARTIALLY RECEIPTABLE

1. When an admission cost to a meal or entertainment event includes a "donation" component, that amount is receiptable
2. Where a charity offers an item, privilege or other benefit in return for a donation, the benefit is considered to have a nominal value where its fair market value does not exceed the lesser of: \$50, or 10% of the amount of the gift. For example, if the charity sells tickets to a golf tournament for \$250 and a tax receiptable portion of the ticket is \$150, then the most expensive prize the charity can offer any player will be worth \$15

Donations that are NOT RECEIPTABLE:

Under the following circumstances, contributions are not considered a gift and as such, a receipt cannot be issued:

1. Payment of a basic fee for admission to an event/program
2. Payment for a lottery ticket or other chance to win a prize. The donor cannot receive any material incentive to give. If any form of material incentive is offered, the gift is not receiptable. The exception is if draw tickets can be purchased without any requirement that ticket purchasers also make a donation to the fundraising campaign. In this case, a receipt may be issued for the donation to the campaign, not for the purchase of the ticket.
3. Contributions of services - Contribution of services is not receiptable, however there is nothing to prohibit a charity from paying for the services and later accepting the return of all or a portion of the payment as a gift, provided it is voluntary. In this case, a receipt may be issued for the gift.
4. The purchase of good/services from a charity. e.g. United Way cannot provide a receipt for the purchase of campaign t-shirts or sweatshirts.
5. Donation of inventory - the rationale is that the business already has a tax-deductible expense from the cost of manufacturing or purchasing the merchandise. Donations out of inventory would include computers from a computer store, bread from a bakery, food from a grocery store, etc.
6. Donation when the donor has directed the donation to an agency or specific program from which either the donor, or a person within arms' length of the donor, receives a benefit or advantage.



United Way
Kingston, Frontenac
Lennox and Addington

Change starts here.

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