

## Four Steps to Successful Championing

The most effective method of canvassing is peer-to-peer, one-on-one conversations. Canvassing is especially critical when your workplace is running a campaign using e-pledge. E-pledge makes things easy and convenient, but it needs to include a personal connection to inspire participation and reaffirm trust.

### There are four steps to successful Championing:

- Step 1: Learn and prepare
- Step 2: Make it easy to donate
- Step 3: Thank your colleagues
- Step 4: Follow-up, Wrap-up

### Step 1: Learn and Prepare

Learn about the United Way before you begin canvassing your co-workers. You must be able to answer their questions and concerns and have appropriate information ready so that your championing will be as effective as possible:

- Learn about United Way through your staff partner and complementary documents like the Communications Framework ([unitedwaykfla.ca/communication-framework](https://unitedwaykfla.ca/communication-framework)) and Annual Report ([unitedwaykfla.ca/2019-annual-report](https://unitedwaykfla.ca/2019-annual-report)). Follow United Way KFL&A on social media platforms to stay up-to-date on local impact
- Attend a champion training session or host a virtual one for your workplace, your United Way staff member can help facilitate
- Review and become familiar with the information in the materials and on the website at [unitedwaykfla.ca](https://unitedwaykfla.ca)
- Participate in a virtual Seeing is Believing tour to see the United Way supported agencies, front line workers, and recipients of services

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

- Consider your own personal reasons for giving and make your donation first
- Use your workplace e-pledge site to make your donation. This will provide you with first-hand experience with the system to better answer questions from your colleagues
- Schedule brief virtual visits with your colleagues. Take into consideration the best times and platforms (phone, Zoom, Teams, in-person with physical distancing, etc.) to meet with them
- Identify the people on your list who are past donors (available from your staff partner). Plan to approach them first or start with people with whom you have a good relationship. This will help build your confidence and momentum in championing

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### Step 2: Make it easy to donate

The number one reason people don't give is that they were never asked. Making it easy to donate will increase your success rate. Following up personally regarding ePledge completion is a key step to success:

- **Set the tone:** thank your colleague for agreeing to speak to you and for their past support (if this information available). Explain that the purpose of the (virtual) 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 outline some key messages about the United Way's impact on the community. Include any 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 your colleague if they received the link to donate** via e-pledge. Inquire if the link worked, and if they have any questions about the process. 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 the answers, contact your United Way staff partner or your Employee Campaign Chair (ECC)

### Step 3: Thank your colleagues

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

### 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

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### Champion Checklist

- ✓ Meet with Employee Campaign Chair (ECC)
- ✓ Make your own personal donation
- ✓ Attend a champion training session
- ✓ Read the United Way materials and visit the website [unitedwaykfla.ca](http://unitedwaykfla.ca)
- ✓ Join a virtual United Way Seeing is Believing tour
- ✓ Identify the employee group to be championed, start with those who gave last year
- ✓ Review the e-pledge site, and information about e-pledging. Review pledge forms (if applicable) to ensure you can answer questions about both options
- ✓ Meet virtually /physical distancing 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

Visit our website at [unitedwaykfla.ca](http://unitedwaykfla.ca) to view our annual report, financial statements, information, and updates. Follow United Way KFL&A on [Facebook](#), [Instagram](#), [Twitter](#), and [LinkedIn](#).

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