

# Local Love

impacting local lives



**Employee Campaign  
Chair Steps to Success**



**United Way**  
Kingston, Frontenac,  
Lennox and Addington

## **The Power of Local Love**

Join thousands of donors who choose to change lives everyday, right here in KFLA, by giving to our community through the United Way.



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“ I love seeing people in the community and knowing that I made a difference and we as a workplace made a difference in their life ”

-Employee  
Campaign Chair

# Employee Campaign Chair Roles & Responsibilities

An Employee Campaign Chair (ECC) is a volunteer in a workplace who has been carefully selected to lead the United Way workplace campaign. This individual works closely with United Way staff and volunteers and is responsible for working with a team to lead, manage and monitor the workplace campaign.

## Responsibilities

- Chairing the employee campaign
- Recruiting volunteers, committee members and canvassers
- Coordinating training sessions for canvassers and committee volunteers
- Developing a plan for the workplace campaign, with targeted strategies
- Compliance with CRA, licensing and other regulations
- Liaising with United Way staff for materials, tools, training, and speakers
- Monitoring progress and identifying challenges
- Supplying updates and results to United Way staff relationship manager
- Returning completed reporting to United Way office by mid-November

## Time Frame

- Spring: debrief and evaluation, planning and strategy, recruitment
- Summer: training, preparation
- Fall: implementation of plan, attending community events, monitoring and wrap-up

## Reporting Relationships

- Advice and guidance provided by United Way staff relationship managers
- Supported by staff and sponsored employees
- Responding and reporting to senior management/leadership in the workplace

## Qualities To Ensure Success

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

“ This campaign is about more than dollars raised, it is about lives impacted. These funds will go a long way in making a difference in the lives of so many in the KFL&A area. ”

- Scott Harris, 2019 United Way Campaign Chair

# Welcome to the United Way Team

Our core strategies have worked well, driving growth over the past two decades. These include a targeted focus on workplace partnerships, leadership giving, intentional awareness, and engagement opportunities.

In March 2020, the global pandemic resulted in the shutdown of workplaces and businesses across the country. There has been a dramatic economic impact, and it is projected there will be a long phased-in recovery.

## Assumptions for this year's campaign:

- Physical distancing will still be in place
- Phased opening up/lifting of restrictions
- All workplaces have been impacted in some way
- Some workplaces will still have employees working from home
- Digital, virtual platforms will be widely practiced.

Events are going to happen virtually, based on social distancing restrictions which we anticipate will be in place through the Fall.

A positive aspect to this is that the multi-year strategies already in place can still work:

## Workplace campaigns re-worked for a new model

- Virtual campaigns, with ePledge, digital messaging
- Digital peer learning, training, sharing ideas

## Awareness and engagement adapted to digital platforms

- Agency speaker videos, highlighting impact and innovation
- Frontline agency staff featured, sharing stories of impact
- Virtual tours

## Focus on Leadership giving

- This will continue to be an area of growth
- Leadership Challenge Grant has been renewed for 2020

This guide has been put together to help you run the best campaign possible. It is full of useful hints and suggestions and best practices from your peers in other local workplaces. It captures what works well and what may not work.

Remember, you're not alone. Please contact the United Way office at 613-542-2674 or your staff partner if you have any questions or comments.

## Complementary Documents

**Communications Framework:** A document that provides key messages and a summary of information about the impact of the United Way. Available online at [www.unitedwaykfla.ca/communication-framework/](http://www.unitedwaykfla.ca/communication-framework/)

**Annual Report:** Available online at [www.unitedwaykfla.ca/2019-annual-report/](http://www.unitedwaykfla.ca/2019-annual-report/)



## Steps to a Successful Workplace Campaign

### Step 1: Planning and Teambuilding

- Learn about United Way
- Build a Team
- Train your team
- Plan your campaign

### Step 2: Preparation & Awareness

- Promotional materials and tools
- Multi-channel considerations
- Short timelines

### Step 3: Employee Giving

- Launch your campaign
- Canvass
- Champions
- Manage & Monitor
- Wrap up & Recognition

### Step 4: Events

- Plan virtual events
- Timing of events

## Step 1: Planning and Team-building

### Learn About United Way

#### Actions:

- Meet your United Way staff partner
- Attend a Peer Learning Session
- Review United Way materials
- Visit [www.unitedwaykfla.ca](http://www.unitedwaykfla.ca)
- Stay in touch through social media like the Facebook page, follow on Twitter, Instagram and LinkedIn at [@unitedwaykfla](https://twitter.com/unitedwaykfla)

#### Quick Tips:

Work with your United Way staff partner to run the best campaign possible. They can:

- Supply digital awareness and promotional material
- Provide training to your team
- Arrange for guest speakers from partner agencies via video or virtual channels, virtual tours, and other ways for your workplace to get involved

# Build A Team

Build a campaign team that is reflective of your organization. Recruit representatives from all departments, including management and Labour (if applicable). This year, consider what you will need to enhance your virtual campaign.

Connect United Way with IT, HR, and payroll departments to help with ePledge data and files.

An ideal committee includes the following:

- Virtual Events Chair
- Communications/Awareness Chair
- Treasurer
- Lead for Champions
- Executive Sponsor
- Next Gen Workplace Ambassador
- Retiree Champion

Consider who you need to add to the team to run the best digital campaign (IT, digital communications, learning champion).

Roles and descriptions are outlined later in this guide.

## Quick Tips:

- Recruit early
- Define roles, structure, expectations
- Peer-to-Peer; include representatives from all departments and locations, union (if applicable), management, Next Gen, retirees

Look for people who have the following qualities:

- Enthusiastic about participating in your United Way campaign
- Results-oriented and dependable
- Respected by their co-workers
- Support the United Way

# Train Your Team

Educate your campaign team about United Way and the local impact of your donation. This year it is particularly important to ensure everyone has the opportunity to learn about the new virtual tools and plans.

## Actions:

- Encourage them to attend a Peer Learning Session or host a custom training/orientation session for your committee with your staff partner
- Schedule a training session for your unit representatives and department leads
- Schedule training sessions for champions
- Include a virtual Seeing Is Believing tour or speaker at the start or close of your training

## Quick Tips:

- Connect with your United Way staff partner for support in delivering training
- Don't forget to include orientation and information to your IT/HR/Payroll reps



## Develop Plan

Develop a plan to address this year's changes.

### Actions:

- Develop strategies for a virtual campaign this year
- Establish a timetable
- Circulate timetable to management and employees (and union if applicable)

### Quick Tips:

- Review Leadership gifts (\$1,200) and identify opportunities to grow; consider which medium would best suit each Leader

## Step 2: Preparation & Awareness

Consider a multi-channel approach. Think about how you can broadly reach out to all levels of employees and locations. Wherever your supporters are, whatever medium they engage with, they should get the same campaign message.

### Actions:

- Review opportunities for engagement and awareness
- Review digital tools available and decide which would work best for your campaign
- Don't hesitate to ask for customized materials or tools
- Promote your campaign throughout your workplace using intranet, email, videos etc.
- Signal the start of your campaign to your entire organization

### Quick Tips:

- Establish a Sense of Urgency - Keep your campaign timeline short –Ideally just a week or two. This is typical best practice and even more important for this year given the business challenges companies are facing.
- Craft a Short, Clear Call to Action - Simple cause and effect is best (i.e. dollar impact). Cut through the noise and promote the bottom line



# Step 3: Employee Giving

## Launch your campaign

### Actions:

- Include the United Way virtual kickoff event as an opportunity for team building, motivating, and thanking your own team
- Kick off your campaign with an event or a simple reminder
- Virtual agency speakers (videos or real time via online platform)
- Involve management (and union leadership if applicable)

## Virtual Kickoff

- Considerations for a virtual kick off might include:
- Depending on the size of the organization the “kick-off” might be one large meeting or a series of smaller meetings
- Determine who needs to lead the meeting – CEO, Leadership Team, United Way rep
- Kick-off should be no longer than 30 mins (or select an ideal time but remember it is more difficult to hold attention for long periods of time virtually)
- If possible, make part of the kick-off interactive. Ideas could include running a poll, showing a speaker video, running UW trivia – keep the audience engaged
- A call to action should be embedded in the meeting invite, or immediately after by providing a link to your giving platform
- Where attendance may be an issue consider joining a pre-existing meeting with a captured audience like a town hall or weekly department meeting



**19,741**

children and youth accessed programs to reach their highest potential



**9,951**

individuals and families were helped by programs and initiatives supporting personal wellbeing and safety



**29,628**

people were helped by our programs and initiatives in meeting their basic needs and moving out of poverty

### Reminder

Though many campaign activities can be turned virtual, it is not as simple as running them online. You need increase the ways in which people can interact to hold virtual participants’ attention.

# The Ask

Now, more than ever, pledging will need to be the focus of workplace campaigns to mitigate potential loss of revenue from special events.

**#1 reason people don't give is because they weren't asked**

## Actions:

**100% Canvass is the most important step to success. It must be:**

- Personal follow up
- Conducted by the most appropriate canvasser / champion who has the information and training to provide answers
- All employees can be asked whether they have all the information they need, whether they received their e-Pledge email, and whether they have had a chance to consider a gift
- Ensure all Friends and Leaders have been asked by a Leadership Champion or peer ask
- Blitz campaigns make it easier to get the word out

## Champions

Champions are critical to help reach out to employees and to help create excitement and interest in United Way.

- Think about your champion to employee ratio – this may need to be lower in a virtual world to ensure reach outs can be made to everyone
- Offer UW online training and build in interactive pieces like online role play in breakout rooms

**Champion roles may look slightly different in a virtual world:**

- Help them feel comfortable running an effective canvassing meeting
- Provide presentation template and script. You may want to include key messaging related to UW's COVID-19 emergency response to enhance UW's case for support
- Ensure your champions can help employees to make a donation through your giving platform to make it as easy as possible for people
- Labour partners help you reach out to unionized members within workplaces where you might have limited access

## Things to consider

- Do all employees have access to email and/or computers?
- What are alternative ways we can reach employees that might have typically given via paper pledge form?

## Giving Options

- Make giving easy. Look at all the different options of giving and see how you can adapt or offer these to employees in your workplace.
- Many workplaces find it effective to offer auto-renewal
- Redirect donors who use paper to the United Way website through phone calls either by your champions or UW
- Editable PDF pledge forms
- Consider roll-over gifts by getting permission from donors (eg. unless the donor says otherwise, the gift will be rolled-over to subsequent years)

- Employee payroll deduction plans through workplaces are the easiest way to give
- to the United Way. Other options for giving include:
- Monthly donations from credit cards or chequing accounts, processed on the 15th of each month beginning in January
- One-time donations by cash, cheque or credit card
- New this year, instead of cash or cheque, we have options like e-transfer and paypal.
- If your online campaign doesn't offer these, look into how employees can use the online option on UWKFLA's website (talk to your staff partner)
- Gift of Securities: donors can benefit from the tax advantages of donating securities

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Leadership Giving is the fastest growing segment of the United Way campaign. Leadership Giving starts at \$1,200 a year, or \$100 a month or more.

● <b>Transformational</b> .....	\$100,000+
● <b>Philanthropist Circle</b> .....	\$25,000 - \$99,999
● <b>Platinum</b> .....	\$10,000 - \$24,999
● <b>Gold</b> .....	\$5,000 - \$9,999
● <b>Silver</b> .....	\$2,500 - \$4,999
● <b>Bronze</b> .....	\$1,200 - \$2,499
● <b>Friends of the Way</b> .....	\$500 - \$1,199

## Leaders of the Way

### Leadership and Major Individual Giving

There is historical data that shows most people continue philanthropic giving even in challenging economic times. Additionally, there are many things that don't change: people feel good when they give. There is no time like the present – reach out to donors about the work United Way is doing in the community in response to COVID-19.

Focusing on Leadership Giving is the most effective strategy to grow your campaign. Please contact the United Way at [leadership@unitedwaykfla.ca](mailto:leadership@unitedwaykfla.ca) for more information. You can also request the Leadership Giving Guide from your staff partner.

#### Quick Tips:

Don't make assumptions about anything and stay curious; go into conversations with an open mind and ask questions to gather information and insight. Donors might be considering increase in gift due to the current situation and/or knowledge of lost revenues. They may be thinking of postponing their giving decision to see how uncertainty plays out, but both are okay.

# Leadership Challenge Grant

Once again this year, Jessica Bayne-Hogan, Women United, member of the United Way Board of Directors, will generously provide a Leadership Challenge Grant to encourage Leadership level gifts. In 2019, this helped increase giving by Leaders of the Way by 21%.

## New Leadership Donors

By becoming a new Leadership donor, you increase the impact of your gift.

- Your first-time donation of \$1,200 or more to the United Way will be matched up to a collective maximum amount
- Increase your gift to \$1,200 this year and the Leadership Challenge Grant will match your \$1,200 donation

## Renewing Leadership Donors

If you are already a Leader of the Way and, this year, you add at least 10% to your gift, the Leadership Challenge Grant will provide a match up to a maximum amount.

For more information about the grant and Leadership giving, contact us at [leadership@unitedwayfla.ca](mailto:leadership@unitedwayfla.ca).

# Manage & Monitor

Ongoing monitoring and diligent follow up after the initial approach will ensure that no one is missed

## Actions:

Establish system early for:

- Monitoring progress
- Reporting to United Way and senior leadership
- Provide updates to employees on the campaign results so they can see the progress
- Consider thanking employees as you receive their contribution to the campaign (call or e-mail)
- Regular follow up is necessary with canvassers/champions – phone calls, emails
- Weekly updates to staff partner
- Communicate results regularly to workplace



## Wrap Up, Recognition

Recognize donor and volunteer contributions to build loyalty to United Way and your campaign.

### Actions:

Thank everyone (committee members, canvassers, senior management, Labour, volunteers)

- United Way digital cards, certificates are available
- Publicly acknowledge those who have gone above and beyond
- Work with United Way to ensure all donors get thanked. All Friends & Leaders get thank you from United Way; are there steps you can take to thank all donors?
- Communicate results to the workplace
- Evaluate results, document in plan for following year
- Conduct a debrief with your campaign team to determine what worked and what didn't work

### Quick Tips:

- In the spring: ePledge thank you email with impact of your gift include thank you and share impact of donations
- Redeploy your campaign team to follow up with a gentle reminder to those who may have forgotten to submit their pledges – phone calls are a great way to connect
- Send out a short reminder email to your employees from the ECC or CEO/ Labour leader, outlining community needs, campaign results to date and stress the urgency of submitting pledges
- Include campaign results in your thank you messages so that everyone can feel part of your success.

# Step 4: Virtual Events

Virtual events are a fun way to increase involvement in the United Way campaign, raise awareness, and build team morale

## Actions:

- Use events for morale, visibility, awareness, teambuilding
- Plan on raising funds through employee giving and not from events
- Choose a lead: recruit an events chairperson to be part of your campaign committee
- Check-in with management: ensure events do not interfere with any restrictions or guidelines your workplace may have in place
- Follow guidelines: make sure that you are aware of all government guidelines regarding receipting, solicitation of donations/prizes and licensing

## Some examples of virtual workplace events:

- Auctions and Raffles (don't forget to get a gaming license!)
- Games such as Bingo, spelling bees, trivia
- Social Media or "Next up" type campaigns – employees can get all dressed up at home (versus casual days at the office) and post pictures of themselves to create awareness about the campaign, do something good challenge where someone tags their next colleague to do something
- Virtual walks/runs
- Online galas, open mics, talent, dance parties and entertainment events (provided by colleagues from their homes)

- Online learning activities e.g. cook like a chef, flower decorating, learn a new skill (led by celebrity contacts, professional volunteers or colleagues and a list of supplies for participants to buy can be sent or purchased in advance)
- Walk This Way for United Way
- Virtual Escape Room –
- The Great Take-Out
- Recipe Exchange

## Events to engage Affinity Groups

This year, virtual events may be a way to engage different audiences like Next Gen, Women United, Retirees.

### For audience-specific engagement and events, don't forget to:

- Confirm how these different audiences come together (e.g. how often do young professional groups meet at the organization? Could a woman leader host a virtual panel discussion on women's issues?)
- Consider your account segmentation what engagement opportunities that the workplace is eligible for (see Donor Engagement and Events E-Learning) in your planning process

Special events are an excellent complement to your United Way campaign. They can generate awareness, fun. This year, use them for fun and awareness rather than fundraising.

## Quick Tips:

Take inventory of all the workplace special events that took place previously and how you can mitigate losses. Determine which events won't be taking place and which can move to virtual.

# Campaign Timelines

## Sample Model Campaign

Off campaign season

- Talk to your staff partner
- Attend a Peer Learning Session
- Establish timelines and recruit committee members
- Thank previous year's donors

### 6 weeks before

- Meet your staff partner
- Organize training and orientation



### 3 weeks before

- Promote your campaign
- Introduce your campaign committee
- Review list of agency speakers videos



### 1 week before

- Train your champions
- Provide awareness
- Agency speakers

## Campaign Launch

### Week 1

- Start the week with a kick-off
- Peer to Peer follow



### Week 2

- Re-canvass
- Follow up email



### Week 3, 4, 5

- Share achievement of your campaign
- Follow-up

“ You need to completely believe in the campaign and what it does. Know that you are making a difference. You have to be available and keep the momentum going – it is all worth it in the end. ”

- Employee Campaign Chairr

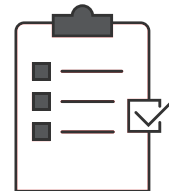
# 5 Steps to a Successful Blitz Campaign

## Benefits of a One Day Blitz

- Works well for ePledge campaigns
- 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-ups to be completed

## Checklist to a Successful Blitz Campaign

- Meet with your United Way staff 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.
- Send out an email of support from management and Union leaders encouraging employees to participate.
- Promote the campaign in advance with lots of email communication, through the company newsletter, the intranet, etc.
- Invest time in the training of champions to ensure that they are comfortable with the process and communicating the United Way message.
- Plan to include videos, agency speakers and messages from the management, union Union leaders or campaign coordinatorECC in your presentation to the staff the day of the blitz.
- Remind co-workers the day before the blitz
- 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!



# Campaign Committee Structure

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

There are variations in size and structure of a workplace campaign team, based on the structure of the workplace. The essential components are:

- **Chair:** Employee Campaign Chair is in a leadership position, appointed to lead the campaign and act as the liaison between the United Way and the workplace team, develop strategy and report to Senior Leadership/Management
- **Peer to Peer:** representation on the committee from different areas of the workplace including any different sites, different departments, job categories (and Union representation if applicable)
- **Personal follow up:** optimum canvasser/champion to employee ratio is 10 or 15 employees to be canvassed for each canvasser/champion. Often canvassers champions report directly to their canvass chair but team leaders are recommended for all departments if the size of workplace warrants it. This helps to streamline communications and follow-up
- **Training and orientation:** all committee members need to participate in a formal or informal training or orientation session to ensure they have the most accurate information and are aware of their workplace plans and strategies

## Committee Responsibilities, and Guidelines

### Committee Responsibilities

- Employee Campaign Chair
- The ECC is recruited by the leader of the organization and is the primary liaison with
- United Way. This volunteer ensures:
- Management of UW workplace campaign
- Resources are available to support the campaign
- Plans, timelines are confirmed
- Committee is recruited
- Training/orientation of committee and champions
- Goalsetting
- Monitoring and providing updates

- The Awareness & Education/Communications Chair is responsible for communications and information. They liaise with the United Way to coordinate speakers, tours and materials to promote the impact of donations. They often customize materials internally.
- The Lead Champions/Canvass is responsible for canvassing employees. Employee dollars make up the majority of UW funds raised. The Lead recruits team leaders and champions/canvassers, coordinates with United Way for materials, ePledge.
- The Treasurer is responsible for monitoring donations, reporting and submitting these results to the ECC and/or UW.
- The Leadership Chair is responsible for implementing the key strategy in this year's campaign, (e.g. leadership giving). They are a Leader of the Way (Leaders of the Way donate \$1,200+ annually) themselves. They follow up with leadership donors and work closely with the United Way to organize presentations or Leadership events.
- A Next Gen Ambassador is a representative in their twenties or thirties who engages Next Genners in the workplace, providing information about United Way.
- A Retiree Champion is a retiree who works closely with the committee to implement plans to canvass retirees, makes the ask and follows up with retiree donors.
- In larger workplaces, team leads represent the committee at every unit or department. They recruit and liaise with champions/canvassers in their unit/department, organize training, materials and monitors timelines. They liaise with the Treasurer to submit results.
- A canvasser/champion is actively involved in the canvassing/following up with all employees, and acts as a champion of the United Way by sharing messaging, focusing on impact, and answering questions that may arise.

“ The success of any campaign is built around a noble but simple idea - to make our community better. This campaign and the funding that we have raised together will do just that, but achieving success is more than just an idea. It only comes together because of great people like you. ”

- Brigadier-General Stephen Kelsey 2016  
United Way Campaign Chair

# Resources/Tools to Help You Succeed

**United Way Staff Partner:** will provide you with all the support, guidance and tools you need to succeed.

**Sponsored Employee:** is an individual loaned to the United Way by an organization for the three-month duration of the campaign.

**Peer Learning /Orientation sessions:** volunteers from other workplaces share their tips and tools at this session.

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

**Seeing is Believing Tours:** board the bus to see the impact the United Way of KFL&A has in our community. The tour provides volunteers with an opportunity to see their donations at work in the community.

**Customized agency tours:** if you cannot make one of the pre-scheduled bus tours, let us know and we will see if we can design a tour specifically for you. We can do walking lunch tours, or longer morning or afternoon tours.

**Presentations:** leaders in the community will make 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 and PowerPoint presentations are available upon request. Banners and signage are available on loan from the United Way office.

**Promotional material:** United Way stickers, balloons, aprons, chef hats, flags and much more are available through your staff relationship manager/loaned representative to support your campaign and events.

**Print materials:** United Way provides print materials to help you promote 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.

**Media liaison:** United Way will assist you in promoting your events through Blogs, social media, emails and can 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:** FAQ's are included in this Guide and are also available online at [www.unitedwaykfla.ca](http://www.unitedwaykfla.ca).



# Lottery License Process

As your organization begins planning for its upcoming United Way fundraising campaign, it is important to be mindful of legalities. If you're planning a raffle, your organization is required by law to obtain a lottery license. Alcohol and Gaming Commission of Ontario (AGCO) has a special process for workplaces running a United Way Campaign.

## When do you need a license?

Any event that involves gaming, such as 50/50 draws, raffles, casino nights, or bingos, will need a license from the province. The application form must be filled out in the name of your workplace and have a letter attached with the authorization signatures from United Way. The application will require written approval from the municipality. The application is then sent to your provincial licensing bureau with the required application fee. For more information in your region, consult the United Way.

\*Please note that it can take up to six weeks to receive your license. Therefore, if you anticipate needing a license, please contact your provincial licensing bureau as soon as possible \*

## What constitutes a game of chance?

- A prize (donated or purchased)
- A chance to win
- A fee for a chance to win

## Event proceeds

It is required that all proceeds of the event be recorded money be deposited separately from other donations or other event proceeds, as required by the gaming authority. A report must be filed with the AGCO within 30 days of the event.

To apply for a lottery licence, follow these steps:

1. Download the form from [www.agco.ca/sites/default/files/6004\\_affle\\_app\\_1.pdf](http://www.agco.ca/sites/default/files/6004_affle_app_1.pdf) or pick up a copy from the Licensing Department of your municipality. An application must be completed and signed by two members of the organization (not the United Way) that have signing authority and sent directly to the Alcohol and Gaming Commission of Ontario (AGCO).
2. The application must include an agreement letter from the United Way acknowledging the approval of the raffle and that all monies will directed to the United Way.
3. A "Letter of Support" must be obtained from the Licensing Department that approves the conduct of the lottery in the municipality. Reach out to your municipality for more details.
4. A fee of 3% of the total prize value is charged for the license and a cheque must be included with the application made payable to the "Minister of Finance".
5. A copy of the ticket to be used for the raffle must be submitted with the application.
6. The AGCO will issue the license directly to your organization and the license must be posted at the raffle draw.
7. Once the lottery is completed, a report must be filed with the AGCO within 30 days of the event. Please send a copy to the United Way at the same time. [www.agco.ca/sites/default/files/6347\\_g.pdf](http://www.agco.ca/sites/default/files/6347_g.pdf)

## Questions? Contact:

United Way Gaming Registration Officer Alcohol and Gaming  
Commission of Ontario 90 Sheppard Avenue E., Suite 200 Toronto,  
ON M2N 0A4 416-212-1856



# Guidelines/Requirements

(As per Alcohol and Gaming Commission of Ontario)

1. (a) A duly completed application form for the relevant type of lottery; for application forms and type visit [www.agco.on.ca](http://www.agco.on.ca)  
(b) Only one lottery license application will be approved to be held within the same draw(s) date. Two concurrent raffle licenses will not be approved. I.e.: You may apply for a 50/50 type raffle or a regular Stub draw event to be held at different days providing you have submitted the financial lottery report within 30 days of the draw date approved on the license previously issued.  
(c) If beer type tickets are used for the draws a sample ticket must accompany application along with the breakdown of the ticket numbers that will be used.
2. All applications must be approved by the applicant ministry/agency's United Way Campaign Chair and must be complete and duly signed by two executive officers.
3. Applications require a letter of recommendation from the municipality in which the applicant is based; in municipality, you must send the application form to: City Clerk's Office, Lottery Department, with a letter asking for their approval for this lottery application and in turn submit that letter with the application to the AGCO.
4. A letter of agreement between the applicant and United Way with a clause stating that the organization will only carry out the lottery during the published dates of the United Way campaign in the workplace of the sponsoring organization, and donate the total net proceeds to United Way Campaign. Letter should
5. The application must also contain a sample of relevant tickets to be used at the lottery events.
6. Must enclose a cheque, for the relevant license fee (3% of the total prize board which must include all taxes. Total Prize board must be a minimum of 20% of the value of tickets printed and is calculated on the higher ticket value not the discounted portion), and made out to "The Minister of Finance" - personal cheques are not acceptable. Use company cheque or money order.
7. If the prize-board on the lottery event is \$10,000 or more, an irrevocable letter of credit is required.
8. The lottery event must only be conducted and managed within the workplace.
9. Participation in the lottery event is restricted to the employers and employees of the licensee only, and tickets may only be sold to the individuals working within that office
10. All lottery events licenses for the United Way Campaign will be issued only by the AGCO. Please note that concurrent licenses will not be allowed. One license must end before a 2nd license may begin

# Donor Choice Option

Some donors may wish to designate a portion of their contribution to a specific community or agency.

- A minimum donation of \$20 is required for designations.
- All designations are paid over and above agency allocations.
- To cover some of the costs incurred in tracking and processing the donation, a 10% processing fee applies to all designations, except to other United Ways.

Donors can choose from the following options when making their contribution

## 1. To United Way to distribute for maximum impact

The United Way researches the needs of our community and invests in programs that have the maximum impact. Volunteers conduct a thorough review of agency applications and make recommendations to the United Way Board of Directors. Programs funded through United Way are carefully reviewed.

## 2. To United Way KFL&A Covid-19 Fund

The pandemic crisis has created the need for special funding to help agencies provide services in new ways to help the most vulnerable. Recovery will take a long time and community agencies are going to need financial support to deal with increasing needs.

## 3. To one of the United Way's impact areas:

- **All That Kids Can Be;** Our 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.
- **Healthy People, Strong Communities;** Our 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.
- **From Poverty to Possibility;** Our goal is to help people engage in their community by strengthening neighbourhood revitalization efforts, reducing poverty, and improving access to affordable housing.

## 4. To specific registered Canadian charities, including other United Ways

There are 85,000 registered charities in Canada. Donors can select any one of these. Donors are requested to provide the Charitable Registration number if using this option, ensuring that we send their money to the intended charity. Registration numbers are available in Charities Listings on the CRA website [www.cra-arc.gc.ca](http://www.cra-arc.gc.ca)

Designations are paid after they are collected. This means that designations through payroll or monthly options will be paid in the spring after the annual pledge has been collected. One time (cash, credit card) designations are paid in the spring following the current year campaign

### Tax benefits make giving to United Way even more attractive

An individual who makes a gift to United Way receives a federal tax credit against income taxes. The annual federal tax credit is equal to 15 percent of the first \$200 donated by an individual and 33 percent on whichever of the following amounts is less:

- The amount of the donations for the year above the first \$200
- The amount of taxable income that is over \$202,800

### Donating publicly traded securities

The Capital Gains Tax was removed from publicly traded shares that have been donated. This means that the donor receives a tax receipt for the full value of the shares but is not taxed on any gain.

### The benefits are clear...

If you sell a security, you pay tax on 50 percent of the capital gain. However, when you donate a Gift of Securities to United Way KFL&A the taxable capital gain is completely eliminated.

You will also receive a tax receipt for the full market value of the security in the amount of the closing trading price on the day United Way KFL&A received the security.

Gift amount*	Total tax savings	Actual cost to you
\$ 250.00	\$ 60.18	\$ 189.82
\$ 500.00	\$ 160.58	\$ 339.42
\$ 1,200.00	\$ 441.70	\$ 758.30
\$ 2,000.00	\$ 762.98	\$ 1,237.02
\$ 5,000.00	\$ 1,967.78	\$ 3,032.22

\*Taxable income less than \$200,000 and based on 2019 tax rates

# United Way Eternity Fund – Where there is a will, there is a way...

The Eternity Fund is the permanent endowment fund of the United Way. When you make a donation to the Eternity Fund, the money is invested and the principal is preserved. Only the income earned is used to support essential services and programs, ensuring your gift will benefit future generations.

Eternity Fund gifts can be in the form of cash, life insurance, securities, bequests and real estate. Please contact United Way for more info **613-542-2674** or by email at [uway@unitedwaykfla.ca](mailto:uway@unitedwaykfla.ca)

## Frequently Asked Questions

### Why is it beneficial to give to United Way KFLA?

A gift to the United Way maximizes the impact of your donation locally. Through United Way you help thousands of people in your community. Giving through United Way ensures accountability. 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 gift to the United Way will address social service needs in 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. Audited financial statements show our fundraising costs to be 15.7% including administration. Imagine Canada puts the average cost of administration at 35%.

### 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. The United Way does not provide 100% funding for any one program or to any one agency and encourages a diversity of revenue sources. 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 in your community or a specific charity (member or non-member agency) by indicating your choice on your pledge form.



## **My spouse gives at work. 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.

## **Does 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 often one of the only stable sources of funding for some agencies.

## **My family and I don't use agency programs, so how do I benefit by giving to United Way?**

United Way provides funding to agencies so that essential programs and services will be available in the event that you do 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 helps the vulnerable in 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 and supportive community.

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

There are many agencies that the United Way funds that provide essential services to 59,320 local residents in your community. You can designate to an agency or an impact area of your choice.

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

United Way spends a lot of time ensuring designations are paid as per donor choice. If you give 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 donate in the 2016 campaign through payroll deductions, your pledge is deducted from your pay in 2017 and the funds will be sent to the agency in the spring of 2018.

## 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 is Next Gen?

Next Gen offers young employees in KFL&A ways to become further engaged in their community through a number of activities. It is a unique opportunity for the next generation to bring about change in areas that are meaningful to them. For more information on Next Gen, please call the United Way KFLA office at **613-542-2674** or email [campaign@unitedwaykfla.ca](mailto:campaign@unitedwaykfla.ca).

## What if an employee is close to retirement?

Retirees may pay off the balance in a single payment and then continue their annual support as a retiree. If they provide their home address on their pledge form and check the box indicating that they are retiring, they will receive a pledge form to their residence in future years so that they can continue your support. Retirees can also continue to pledge in monthly installments through credit card or preauthorized payment. Some workplaces allow pension deductions as well.

## How much should I give?

Every decision is personal. United Way impact statements show what different levels of donation can do. Find out what the average gift was in your workplace and match or surpass that. Consider a donation at the Friend of the Way (\$500-1,199 a year) or Leader of the Way (\$1,200+) levels and maximize tax benefits.

## How are compensation levels for staff and the CEO set?

The Board of Directors periodically benchmark the CEO's salary with United Ways of similar size and with similar Canadian not-for-profit organizations. United Way regularly reviews the compensation levels of their staff to ensure they are within reasonable rates for the level of skill, knowledge and experience required for their position.

All charities are required to file a T3010 registered charity disclosure which includes the salary ranges of the ten highest paid employees. This is available at [www.cra-arc.gc.ca/chrts-gvng/lstngs/menu-eng.html](http://www.cra-arc.gc.ca/chrts-gvng/lstngs/menu-eng.html)

# 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 United Way for any information you might need

“ The United Way fills a tremendous gap in so many ways. With the Food Sharing Project, the United Way is a source of funding for us which is essential for a not-for-profit agency, but they're also advisors to us, and the range of community agencies that United Way supports in our community fills the gap for just about everybody. It touches everyone in our community and it's so important to fill those gaps. ”

-Brenda Moore, Food Sharing Project

# United Way Staff & CEO Salaries

## Emails And Letters Claiming Charity Ceos Overpaid Issue

We continue to receive emails and letters from local residents and donors expressing concern about United Way based on information they perceive as factual about the salaries and benefits of CEOs at top charities in the world – UNICEF, United Way, World Vision, Red Cross and the Salvation Army. This standby statement will provide information for front line staff to use in dealing with their donors if they are confronted with this misinformation.

The messages provided below are for use in conversation with United Way and GCWCC donors and others. This document is not for external distribution.

## Background

Emails have been in circulation since 2005, presenting salary and compensation information for top charity CEOs and drawing conclusions about administration costs. They resurface during our campaign, and are also circulated widely following natural disasters when there is a request for aid or funding.

## Key Messages

### So-called facts are misleading

Versions of this email have been around since 2005. Clarification is available on two “myth-busting” websites, Snopes and Urban Legends. Charity Navigator, an independent charity evaluator that works to advance a more efficient and responsive philanthropic marketplace by evaluating the financial health of over 5,500 of America’s largest charities, states that executive compensation should be looked at as a percentage of total annual expenses. It is also worth noting that because the Salvation Army has charitable status as a religion, it does not report executive salaries and compensation in the same way as other charities do.

### With regards to the statement about the salary of Brian Gallagher, president and CEO, United Way Worldwide

Mr. Gallagher is CEO of United Way Worldwide, which is a global organization leading 1,800 locally- constituted United Ways in 45 countries and territories around the world. It is supported financially through corporate sponsorship and through fees paid by each of the hundreds of local United Ways in the U.S. and world- wide. These fees represent a very small fraction of total fundraising in each of the United Ways under United Way Worldwide.

United Way KFLA is a community-based organization, overseen by a local volunteer Board of Directors responsible for strong governance.

United Way KFLA does not pay fees to United Way Worldwide, but to United Way Canada, at a rate of 0.08% of total fundraising. While we don't give out salary information for personal privacy reasons, salary ranges are available. The work of United Way is supported by literally thousands of local volunteers and managed by CEO and staff in Kingston and area.

## Our fundraising fee

United Way KFLA's campaign fundraising and administrative costs are around 15% of total campaign revenue. This cost is strongly competitive when compared to the national average for charities of 35%.

This covers the cost of gift solicitation, advertising and promotion, donor recognition, processing, charitable tax receipting, accounting, reporting and auditing.

We are able to keep fundraising costs very low, thanks to the support of many sponsors and contributors who provide gifts and services in kind and who lend us their staff through our Sponsored Employee program.

## For the Year Ending 2019

**83%** Funds invested directly into programs and services

**14%** Fund raising costs

**3%** Related Administrative Costs

\* Canada Revenue Agency's benchmark for fundraising and administrative cost ratio is under 35%



**\$4,978,784**

Total revenue, including annual campaign

\* \$4,565,001 without Rockin' the Big House

**\$699,533**

Fund raising costs

\* 11% without Rockin' the Big House

**\$142,490**

Related Administrative Costs

We have been recognized for accountability, and transparency in financial reporting having received a 4 star rating by Charity Intelligence Canada.

# 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 which 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. Contribution of services - Contribution of services are 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 goods & services from a charity. i.e. 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 benefitor advantage.

## **Next Gen Workplace Ambassadors**

Next Gen is a United Way initiative designed to engage young professionals in their twenties and thirties. There is Next Gen representation on all committees of the United Way.

The Next Gen Cabinet is made up of young leaders. They have created a network of 'Next Gen Ambassadors' in workplaces. Ambassadors spread the United Way message and ensure the next generation of leaders is involved in their community. They participate in Next Gen activities and promote events and engagement opportunities within their workplaces.

This is a great opportunity for someone in the Next Gen demographic at a workplace to become an active member of a peer group, with a chance to network with community leaders.

### **The Ambassador's Role**

The Ambassador's role is to work with the United Way Employee Campaign Chair and Committee to develop and execute a strategy specifically tailored to your workplace, with the following objectives:

- Increase awareness of the Next Gen and United Way message at your workplace
- Provide information about United Way to other employees
- Act as a point of contact between the United Way Next Gen and your employees in the Next Generation

# Workplace Retiree Campaign

## What is the Workplace Retiree Campaign?

- A Retiree Campaign is designed to retain donors from workplaces in the region who have retired. In response to a growing number of loyal donors
- who are leaving the workforce – as retirees or to pursue self-employment outside the traditional workplace – the United Way recognizes that it is critical for your workplace campaign to find new ways to engage these donors

## Why Should You Run a Retiree Campaign?

- The retiree population represents a great opportunity for increasing the number and volume of donations to United Way KFLA.
- Currently approximately 32% of the Kingston Area population is over 55
- The over 55 age group donates almost twice as much as the under 55 group
- Over the next ten years the population growth in Kingston will be in the 65+ age group

## Best Practices

- Connect with retirees before they leave their workplace and encourage them to continue their donation – through monthly giving options (credit card, Pre-authorized Payment or pension deductions), securities, or one time gifts
- Recruit a Retiree Champion at your workplace. Include the Retiree Champion on your campaign committee
- Peer to peer ask is important: solicit recently retired employees with a personal letter from your Retiree Champion
- A personal follow up can have a large impact. Track your results and progress, and follow up where necessary
- Analyze results at the end of the campaign and debrief on what worked well
- Tools and Templates
- The Retiree Task Force has developed a library of templates and tools that can help you with your campaign. Contact the United Way for more information



# Impact of Your Gift

Here are some examples of how your donation helps people in our region:



**15,500**

students had nutritious snacks and meals at school



**324**

high school students had intense tutoring and mentoring to help them graduate



**353**

people accessed information and programs in support of their mental health



**450**

people affected by epilepsy received information and supportive services



over **13,800**

people benefitted from reclaimed fresh produce and prepared meals



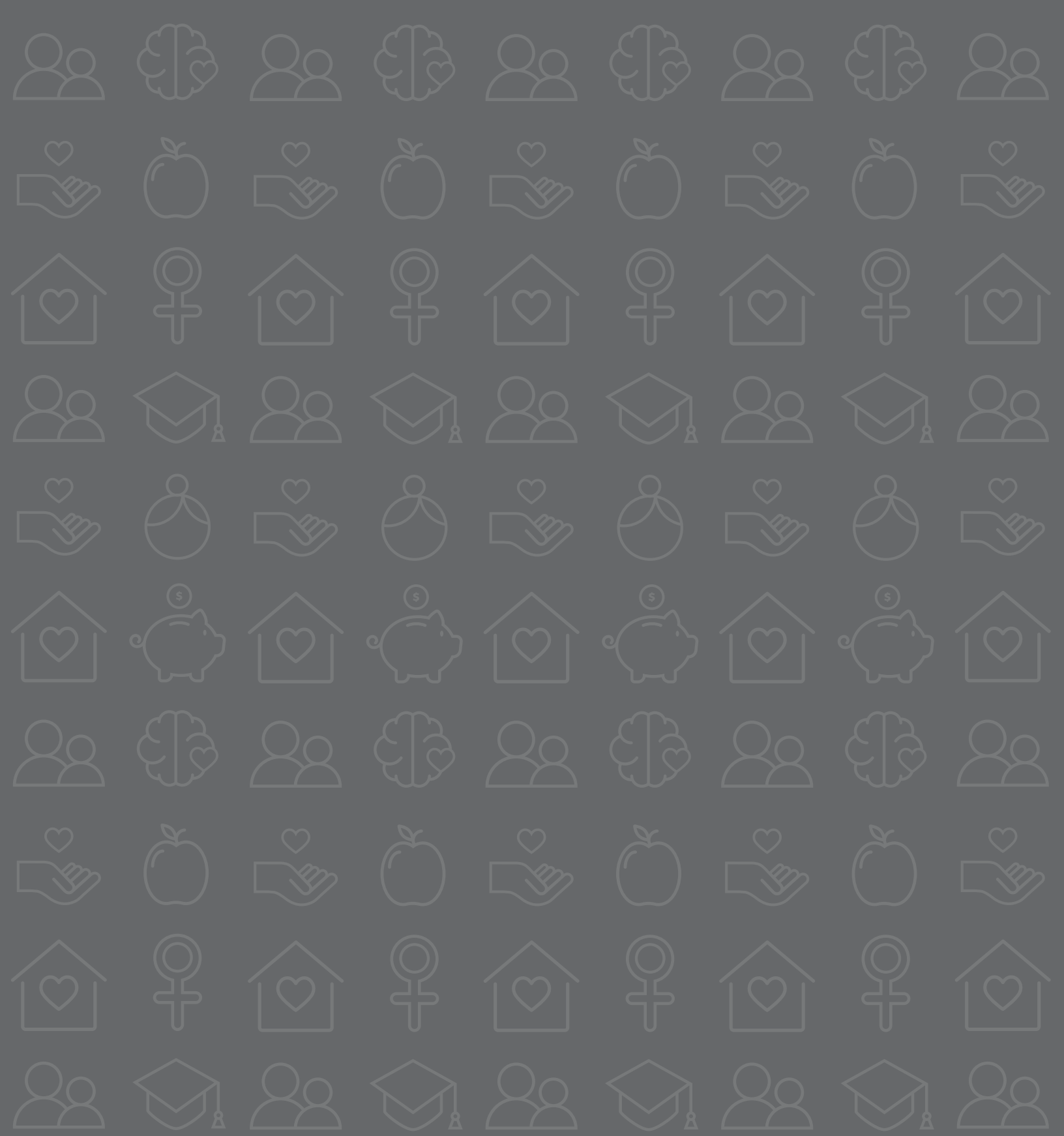
**38,000**

meals were served by local soup kitchens



**367**

job seekers with low incomes received professional work clothes



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