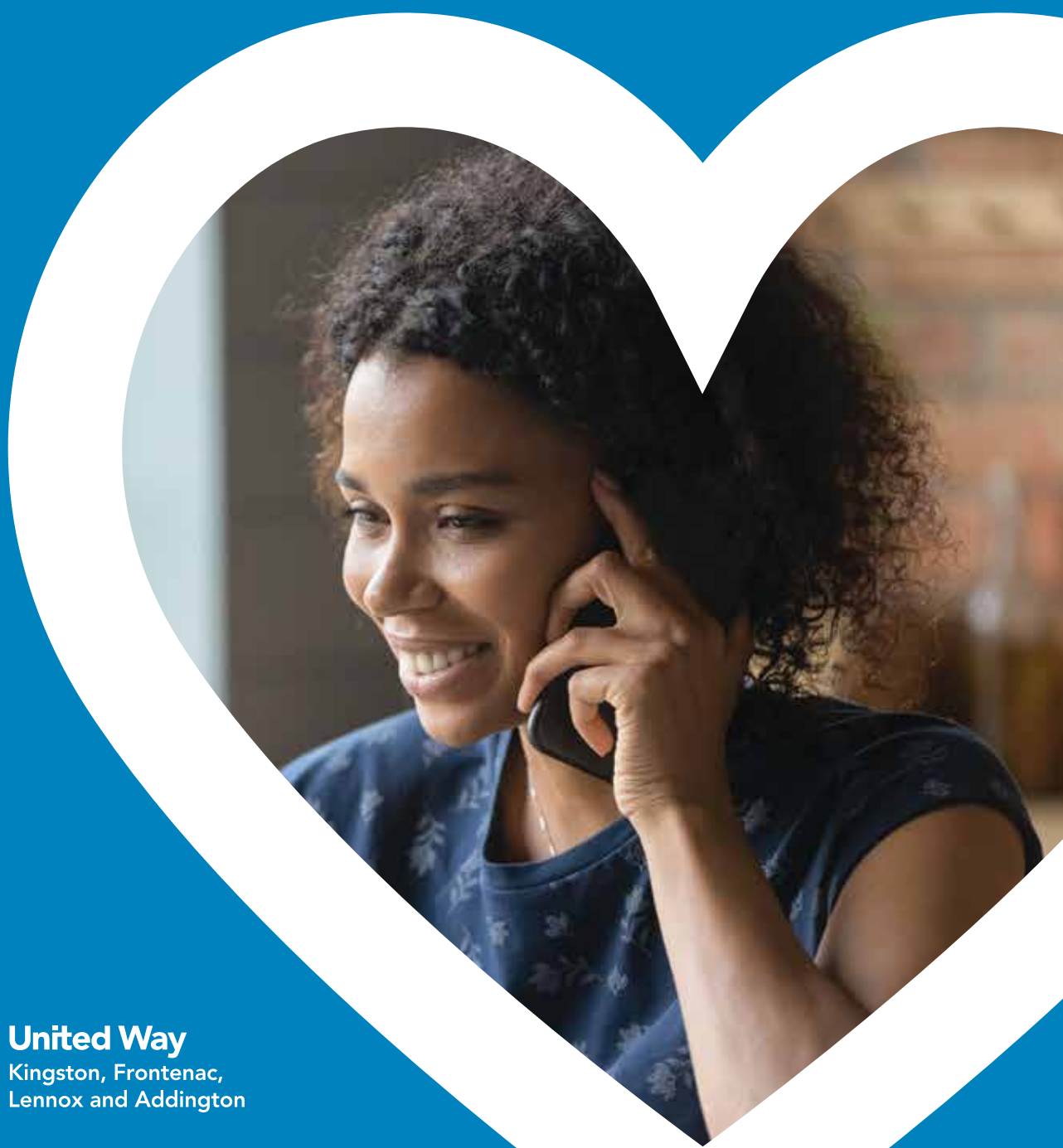


2022

# Employee Campaign Chair **Steps to Success**



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

Your workplace campaign  
is helping build a community  
where individuals can **live with  
hope, dignity and belonging.**



# Table of Contents

Welcome to the United Way Team .....	4	Donor Choice Option .....	22
Employee Campaign Chair Roles & Responsibilities .....	4	United Way Eternity Fund - Where there is a will, there is a way.....	24
Campaign Committee Structure .....	5	Frequently Asked Questions .....	25
Committee Responsibilities, and Guidelines.....	6	Tips for Responding to Questions .....	27
Campaign at-a-glance.....	7	United Way KFL&A Cost Ratio .....	28
10 Steps to a Successful Campaign.....	8	Canada Revenue Agency Guidelines for Receipting .....	29
Giving Options.....	14		
Leaders of the way.....	14		
Next Gen Workplace Ambassadors.....	16		
Retirees United .....	16		
Women United.....	17		
5 Steps to a Successful Blitz Campaign .....	18		
Checklist to a Successful Blitz Campaign.....	18		
Resources/Tools to Help You Succeed .....	19		
Lottery License Process.....	20		
Guidelines/Requirements .....	21		

“ There’s need across so many sections of society and it is wonderful that United Way KFLA touches on lives across economic, social and cultural boundaries. ”  
**-Seeing is Believing  
 tour participant**

# Welcome to the United Way Team

Welcome to the United Way Team

Thank you for volunteering your time! By volunteering with United Way, you are making a difference in the lives of so many of your family, friends and neighbours.

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:

**Community Impact Report:** [www.unitedwaykfla.ca/communityimpactreport/](http://www.unitedwaykfla.ca/communityimpactreport/)

**Annual Report:** <https://www.unitedwaykfla.ca/annualreport/>

**Campaign Toolkit:** [www.unitedwaykfla.ca/campaigntoolkit/](http://www.unitedwaykfla.ca/campaigntoolkit/)

## 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

- Chair the employee campaign
- Recruit volunteers, committee members and canvassers
- Coordinate training sessions for canvassers and committee volunteers
- Develop a plan for the workplace campaign, with targeted strategies
- Compliance with CRA, licensing and other regulations
- Act as liaison with United Way staff for materials, tools, training, and speakers
- Monitor progress and identify challenges
- Supply updates and results to workplace senior leadership and United Way
- Return completed reporting to United Way office

## 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

# Campaign Committee Structure

Your workplace committee is key to running a successful campaign. The ECC and committee members work closely with the United Way staff partner to employ strategies and best practices.

Committees can vary in size and structure ,depending on the workplace. Here are sample roles and responsibilities and general tips when working with your committee:

- **Peer to Peer:** it's proven that peer to peer campaigns are most successful. Make sure you have 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

- 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 a strategy for leadership giving. They are a Leader of the Way (Leaders of the Way donate \$1,200+ annually) themselves and canvass or 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.

# Campaign at-a-Glance

Here is a sample campaign timeline and overview:

## Spring or a minimum of eight weeks before launch

- Meet with your United Way staff partner to debrief and evaluate last year's campaign. Discuss what went well and opportunities or things you may want to do different this year
- Attend a Peer Learning Session
- Establish timelines and recruit committee members
- Thank previous year's donors

## Summer or a minimum of four weeks before launch

- Finalize your campaign plan
- Organize training and orientation
- Introduce your campaign committee
- Review list of agency and speakers, campaign materials and videos

## Fall: Campaign Launch!

- Hold a Campaign Kick-Off and Pledge Blitz
- Share videos, speakers, materials to help engage your employees
- Hold events after your pledge blitz
- Track your success and plan a touchdown to announce your results

“ You need to completely believe in the campaign and what it does. Know that you are making a difference and you need to have 100 per cent commitment from the start. You have to be available and keep the momentum going – it is all worth it in the end. ”

**-Employee Campaign Chair**

## General tips

- Focus on pledges/donations as that raises the most money
- Keep your timelines tight—many workplaces have found one-day or one-week pledge blitzes very effective
- Hold events that involve giving money only after your employees have made their pledge donations
- Tell stories: stories have the power to move people and put a face to the numbers





## Step 1: Planning and Team-building

Objective: Learn about United Way to build your team's commitment to motivate others to get involved.

### Actions:

- Meet your United Way staff partner
- Attend a Peer Learning Session
- Review United Way videos and materials on our website, [unitedwaykfla.ca](http://unitedwaykfla.ca)
- Go on a Seeing Is Believing (SIB) Tour
- Invite your staff partner to a committee meeting to talk about United Way
- Follow us on social media at @unitedwaykfla (be sure to like and share our posts!)
- Participate in community events and meet other volunteers

### Key Resources

- NEW! Impact Calculator and Charitable Tax Calculator: Your colleagues can see the impact of their donation with just one click or estimate their charitable tax credit
- Campaign Toolkit: A full page of materials on our website including videos, posters, templates, guides and toolkits
- Community Impact Report: This report lists all our member agencies and programs and provides key messages and information about the impact of the United Way. View online at [www.unitedwaykfla.ca/communityimpactreport2020/](http://www.unitedwaykfla.ca/communityimpactreport2020/)



## Step 2: Build A Team

Objective: Build a campaign team that is enthusiastic, active and reflective of your organization.

### Actions:

- Identify individuals and ask them to volunteer. Recruit early!
- Define roles, structure, expectations
- Include representatives from all departments and locations, union (if applicable), management, Next Gen, retirees. An ideal committee includes:
  - Executive Sponsor
  - Communications/Awareness Chair
  - ePledge/Payroll contact
  - Events Chair
  - Treasurer
  - Lead for Champions or Canvass
  - Next Gen Workplace Ambassador
  - Retiree Champion

### Quick Tips:

- Look for people who support United Way and are enthusiastic, results-oriented and dependable, and respected by their co-workers
- Assign roles and delegate work once you have your team in place
- Persuasive, discreet and have integrity
- Comfortable talking to other people

## Step 3: Train Your Team

Objectives: Educate your campaign team about United Way and the local impact of their donation.

### Actions:

- Host a training/orientation session for your committee
- Schedule a training session for your unit representatives/department leads
- Schedule training sessions for canvassers/champions
- Include a custom Seeing Is Believing tour at the start or close of your training

### Quick Tips:

- Focus on pledges and canvassing— it is the single most effective way to increase your campaign results
- Ask your United Way staff for help in delivering training and providing campaign supplies

## Step 4: Set Goals and Develop Your Plan

Objective: Set realistic goals and develop a plan for achieving them.

### Actions:

- Work with your committee to establish financial and other goals e.g., total \$ raised, 100% canvass, # of donors, increased average gift, etc.
- Review Leadership gifts (\$1,200) and identify opportunities to grow
- Establish your campaign dates
- Outline steps to launch your campaign and achieve goals
- Circulate timetable to management (and union if applicable) and invite leaders to key events

## Step 5: Prepare and Build Awareness

Objective: Lay the groundwork for a successful campaign by building awareness of the campaign, the issues in our community, the work of the United Way and the impact their donations make every day.

### Actions:

- Review opportunities for engagement and awareness
- Request agency speakers through your staff partner
- Review materials catalogue
- Make request for materials from your staff partner
- Promote your campaign throughout your workplace using posters, intranet, email, videos etc.

### Quick Tips:

- Take a top-down and bottom-up approach: eg. If your goal is to increase total \$ raised by 10%, think of what strategies will help you achieve that goal: 1 new leader at \$1,200, target existing donors and ask to increase their donation by 5%, etc.

### Quick Tips

- A two-week timeframe is ideal with the first week focusing on pledge giving and the second week focusing on any events
- Blitz campaigns keep up the momentum, are great for getting the word out and are easier on your campaign committee



## Step 6: Launch Your Campaign

Objective: Launch your campaign and generate excitement!

### Actions:

- Include United Way kickoff event as an opportunity for team building, motivating and thanking your own team
- Kick off your campaign with an event and pledge blitz
- Use videos, posters, banners, impact statements and agency speakers
- Involve management (and union leadership if applicable)

## Step 7: Canvass

Objective: Invite colleagues to donate to your campaign. We know the #1 reason people don't give is because they weren't asked.

### Actions:

- Determine your canvass approach—face to face, peer to peer, personal follow up calls or visits
- Choose the most appropriate canvasser/champion with the information and training to conduct the canvass and answer questions
- Ensure all Friends and Leaders have been asked by a Leadership Champion or peer

### Quick Tips

Use the kick-off event to:

- Demonstrate senior leader support of your campaign and United Way
- Provide information about United Way
- Outline your campaign goals and highlight key events
- Tell employees what United Way does in the community and why it's important to donate

“ 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, Campaign Cabinet volunteer**

### Quick Tips:

- Offer an early bird prize to encourage people to donate right away
- Analyze your ePledge thermometer and campaign totals to customize messaging during your canvass

## Step 8: Manage & Monitor

Objective: Track your campaign progress by reviewing number of pledges returned and total dollars raised.

### Actions:

- Monitor and report on progress to United Way and senior leadership
- Provide updates to staff on the campaign results and thank them regularly
- Follow up with canvassers/champions

## Step 9: Events

Objective: Find ways to engage and connect with people within your organization and raise awareness of United Way.

### Actions:

- Review events in our events guide
- Use events for connection, engagement, team building, visibility and awareness
- Time fundraising events after canvass
- Remit funds to United Way, clearly indicating these are events
- **Have fun!**

“ I didn’t realize how many of my own co-workers and people I knew used United Way funded services. Getting involved and knowing it could be helping my neighbor, my co-worker, that’s what drove me to be part our workplace campaign. ”

- **Employee Campaign Chair**

### Quick Tips:

- Send out one-two short reminder notes to your employees from the ECC or CEO/Labour leader, outlining the need, campaign results to date and importance of pledges
- Use different techniques to convince people to give—stories, impact statements, videos

### Quick Tips:

- Choose one or two events to keep the focus on pledges
- Choose events that are easy to plan and don’t take up too much time or resources
- Consider how you can build an awareness component into your event eg., having a speaker from one of our food agencies speak at a chili lunch



## Step 10: Wrap Up and Recognition

Objective: Recognize donors and volunteers to thank them and build loyalty to United Way.

### Actions:

- Communicate results to your workplace
- Thank everyone—committee members, canvassers, senior management, Labour, volunteers—United Way cards, certificates are available
- Make sure all donations, pledge forms are submitted to United Way
- Build a succession plan — identify ECC for Evaluate results against goals, document in plan for following year
- Conduct a debrief with your campaign team to determine what worked and what didn't work

### Quick Tips:

- Include campaign results in thank you messages so everyone feels like they contributed to your campaign's success
- Celebrate with food (lunch, cake, etc.)

“ 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**

# 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

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
- United Way has new 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

# Leaders of the Way

## Leadership and Major Individual Giving

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.

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.

### Leadership Giving Levels

<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





# 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

# Retirees United

## What is a 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
- 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

For more information on Retiree United visit: [www.unitedwaykfla.ca/retireesunited/](http://www.unitedwaykfla.ca/retireesunited/)

## Women United

### What is Women United?

United Way KFL&A is joining a world-wide connection called Women United. Women United brings together like-minded women who want to use their skills, talents and resources to contribute to their community in a significant way. Women United builds on the strong legacy of Women in Leadership in our region with members giving independently to the United Way, or jointly with their spouses or partners.

### Local Network

United Way KFL&A has 440 women leaders who make a difference in the community by supporting local programs that have a significant impact. The goal of Women United is to bring even more women and resources together under the United Way umbrella in order to change more lives for the better locally. Women Leaders are active philanthropists who give \$1,200 a year or more to the United Way.

### Local Issues, Local Impact

Women Leaders get a chance to join other like-minded women for a deep dive beneath the issues that affect people in the community. They can learn more about the programs serving women in the community and participate in discussions to help shape solutions to these issues.

For more information on Women United visit: [www.unitedwaykfla.ca/womenunited/](http://www.unitedwaykfla.ca/womenunited/)

# 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 coordinator ECC 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!**

# Resources/Tools to Help You Succeed

- **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. Ask about a custom tour for your workplace
- **NEW! Impact Calculator and Charitable Tax Calculator:** Your colleagues can see the impact of their donation with just one click or estimate their charitable tax credit
- **Campaign Toolkit:** A full page of materials on our website including videos, posters, templates, guides and toolkits
- **Community Impact Report:** This report lists all our member agencies and programs and provides key messages and information about the impact of the United Way. View online at <https://www.unitedwaykfla.ca/communityimpactreport/>
- **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.
- **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\\_raffle\\_app\\_1.pdf](http://www.agco.ca/sites/default/files/6004_raffle_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, the United Way will charge a 5% designation fee and 5% processing fee (up to a maximum of \$250) of the designated donation. There is no designation fee for designations to other United Ways.
- Funds designated to other United Ways will be subject to the 5% processing fee if they are collected via credit card, paypal, or eTransfer. No processing fee will be charged for payroll or cash/cheque donations.

Designations can be made

### **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 one or more of the United Way's impact areas and initiatives:

- **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.
- Programs focus on preventing and ending youth homelessness in the region

## 3. Other United Ways in Canada

We will ask the donor 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	\$ 60.18	\$ 189.82
\$ 500	\$ 160.58	\$ 339.42
\$ 1,200	\$ 441.70	\$ 758.30
\$ 2,000	\$ 762.98	\$ 1,237.02
\$ 5,000	\$ 1,967.78	\$ 3,032.22

\*Taxable income less than \$200,000 and based on 2020 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

## **What is United Way?**

United Way Kingston Frontenac Lennox & Addington works closely with the community to ensure that people have the opportunity to reach their full potential and live with hope, dignity and a sense of belonging. Led by volunteers, driven by a small professional staff team, United Way KFL&A helps people get involved, supporting issues they care about through volunteering and giving.

## **Why is it beneficial to give to United Way KFL&A?**

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 9.3% including related 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.

## **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 emailed or mailed to.

Please ensure you complete the home address section of the pledge form or online – if donating by cheque, cash or credit card – as Canada Revenue Agency requires that tax receipts include home addresses.

## **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. You can find out what the average gift was in your workplace and match or surpass that.

You may want to consider a donation as a Leader of the Way (\$1,200+) level, and maximize tax benefits.

## How are compensation levels for United Way CEO and staff set?

The Board of Directors periodically benchmarks the CEO's salary with United Ways of similar size and with similar Canadian not-for-profit organizations. United Way has worked with Human Resource professionals to create a compensation framework for employees to ensure they are within reasonable rates for the level of skill, knowledge and experience required for their positions. The organization regularly reviews the compensation levels.

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

## United Way KFL&A Cost Ratio

United Way KFLA's campaign fundraising and related administrative costs are less than 15% of total 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.

## 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.
- 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
  - 65+ age group

# Local Love

## in action



417 Bagot Street, Kingston, ON K7K 3C1  
**Tel:** 613-542-2674 **Email:** [uway@unitedwaykfla.ca](mailto:uway@unitedwaykfla.ca)  
Charitable Registration Number: 125978270RR0001  
[www.unitedwaykfla.ca](http://www.unitedwaykfla.ca)



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