

Employee Campaign Coordinator Guide

An effective guide to help
your workplace campaign



United Way
Brandon & District

Change starts here.

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Campaign Basics

THANK YOU!

WELCOME TO THE UNITED WAY TEAM

You are making a difference, by volunteering your time.

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

If you have any questions – remember you’re not alone. Contact the United Way office at (204) 571-8929 or email your staff partner if you have any questions or need assistance.

Some Commonly United Way terms:

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

Campaign Committee: is the team of people who are recruited as volunteers to work with the ECC to plan and implement the in-house campaign.

United Way Mission Statement

“To improve lives and build community by engaging individuals and mobilizing collective action.”

To this end...

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

Canvassers: are the “heart” of the campaign because they are the ones who make the face-to-face ask of their co-workers to donate to the United Way.

What is United Way?

The United Way movement was started in Denver in 1887 by a Rabbi, a Minister and a Priest, who got together to help miners' families. The United Way's roots in Canada began in 1917 in Toronto and Montreal. United Way of Brandon and District Inc. began as The Brandon & District Community Chest and War Bond Appeal in 1938, and to this day serves Brandon, Shilo, Douglas, Forrest, Kemnay and the Rural Municipalities of Elton, Cornwallis, and Whitehead.

Accountability

When you give to United Way, you can be assured that your gift will be invested wisely where it can have the most impact. Your **one** gift to the United Way will reach every sector of the community and address multiple needs.

As the largest non-government funder of social services in Brandon & District, United Way is accountable to you and the community.

United Ways across the country bring diverse people and resources together to address the most urgent issues their communities face. Our United Way is no different. Through unique partnerships and approaches, United Ways mobilize resources beyond the dollars that are pledged through their fund-raising efforts. Community partners often include schools, government policy makers, businesses, organized labor, financial institutions, voluntary and neighborhood associations and community development corporations.

United Way provides funding in two areas – Multi Year Funding, and Community Response Grants. These funds are distributed based on emerging community needs to these identified priority areas:

- enhancing early childhood learning and care
- supporting children and youth at risk
- reducing barriers to social and rural isolation
- providing solutions for homelessness and lack of affordable housing

To allow flexibility in responding to newly identified needs, United Way awards a number of these one-time grants throughout the year.

These funding streams offer opportunities to not for profit organizations in the community and encourage them to be innovative and entrepreneurial in their response to social needs. These grants are carefully screened by local volunteer committees of the Board of Directors.

United Way's own systems and financial operations are reviewed annually by an independent auditing firm. Our budget is reviewed in detail by our Finance and Audit Committee, made up of local volunteers with financial expertise, before being approved by our Board of Directors.

Because United Way is connected to all sectors, we are in a unique position to closely track and respond to social needs as they arise.

Donor Choice Option

In some cases, donors may wish to designate a portion of their contribution a specific agency that is not financially supported by our United Way.

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

- To the Community Fund
- To areas of service or priority need
- To specific registered Canadian charities
- Away from a specific member agency

All designations are paid over and above any allocation an agency receives. For non-funded agencies a one time \$12 processing fee is applied. This covers some of the costs incurred in tracking and processing the donation.

The Community Fund

United Way serving Brandon & District has been supporting people from all walks of life, helping them build better lives. United Way is committed to making our community a better place to live. Through a network of health and social service agencies, United Way provides essential programs and services throughout the area. Our strong volunteer base (approximately 500 volunteers every year) is able to keep administrative and fundraising costs low – well below the average for Canadian charities.

When you donate to United Way of Brandon & District, your money gets invested in the Community Fund, a network of care dedicated to assisting people in our community at all stages of their lives – young children through to seniors.

Why is the Community Fund important?

The Community Fund enables United Way to provide stable funding every year through funded agencies and Community Response Grants. This gives agencies the financial stability to deliver ongoing services, plan for the long term and focus on helping people. United Way's Community Fund ensures a sustainable network of support and helps develop long-term solutions to community problems. Gifts to the Community Fund also allow United Way to offer short-term grant funding to agencies, enabling them to be innovative and entrepreneurial in their response to social needs.

Why is a gift to the Community Fund a smart investment?

United Way uses research and knowledge of social issues to allocate donor dollars where they will have the greatest benefit to our community. United Way's professional expertise about social services ensures that donor dollars are invested well in the community. The Community Fund assures accountability. United Way supports only programs in agencies that demonstrate strong fiscal management. A panel of experienced volunteers works with United Way professionals to review the agencies and rigorously assess their performance and results, examining finances, reviewing all funding submissions and conducting interviews with agency staff, volunteers and board members. Through such careful monitoring, the Community Fund enables United Way to guard against waste, inefficiency and duplication of service.

Fund Review Process

Volunteers from our Board of Directors sit on a committee called Community Resources. This group determines the allocation of funds through the Fund Review Process. Our Fund Review process is an established and proven system that achieves a balance between community needs and agency funding requirements.

Impact Strategies

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

Based on research and consultation, the Community Fund provides a network of care through its accredited funded agencies focusing on these human care needs :

- opportunities for children and youth
- services to ensure individual health and well-being
- services for seniors
- intervention and support
- services to address isolation, homelessness and poverty
- community support services.

Employee Campaign Coordinator (ECC)

A unique personal and professional opportunity

- “You will head up a project team made up of people from throughout your organization/workplace.
- Your team will develop a highly measurable and challenging financial goal to achieve.
- You will not have formal authority over anyone on the team but will provide leadership to guide them by means of persuasion and your personal credibility and influence.
- You will be able to work closely with a large number of people both inside and outside the organization/workplace.
- As project manager, you will interact with the senior leadership team of both your company and other organizations. The opportunity exists for you to meet a large number of the community's leaders in the social service, government and educational domains in both business and social settings.
- At the end of your campaign, celebrate your success!
- You have embarked on a wonderful development opportunity. Enjoy it!

Employee Campaign Coordinator (ECC)

Position Description

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

Time frame & Key Meetings

2-3 months

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

Reporting Relationships

- Supported by United Way Campaign team

Qualities to ensure success

- Leadership & dedication
- Communication and motivational skills

- Planning & analytical skills
- Attention to detail
- Committed to United Way's mission

Responsibilities

- Recruiting canvassers
- Training these canvassers
- Planning the Campaign
- Monitoring progress
- Analyzing results, identifying potential or challenges and working on solutions
- Supplying information, updates and results to United Way office
- Returning completed report envelopes to United Way office
- Attending Recognition event in January

Canvassers: are the “heart” of the campaign. They are the ones who make the face-to-face ask of their co-workers to donate to the United Way.

The Impact of your Donation

Your dollars supported critical programs and services throughout Brandon & District, helping 1 in 3 people in our community last year.

- In 2010, over **30,000** adults and children visited the **Elspeth Reid Family Resource Centre** to access cost free support groups, parenting sessions, and other resources to help strengthen their families.
- Samaritan House now has over **3100** families registered in their **Hamper Program**, and hands out approximately 50 – 70 hampers, 5 days a week.
- Approximately **70** children and their families, some who are vulnerable, at-risk, and special needs, benefit from the individual and group programs at the **Preschool Enrichment Program** offered through Child & Family Services of Western Manitoba.
- **2560** free, or subsidized, counseling hours were offered to over 1000 clients of the **Counselling Centre**. These clients from all walks of life have learned problem solving techniques, coping skills, and been assisted in developing new patterns of behavior. Without United Way funding, the most vulnerable of our population would be unable to access these services.
- Samaritan House had **72** individuals registered in their **Basic Skills Literacy Program** in 2010. Many of these individuals begin the program with reading skills below a grade 4 level, and were able to advance their life skills literacy and move towards their personal goals for education, employment or active participation in the community.

- United Way provides **60%** of the funding required to keep the doors at **The Compassionate Friends** open to provide support for people who have suffered the loss of a child.
- The **Brandon Community Language Centre**, a program of Westman Immigrant Services, provided individuals with limited English **510** bookings with trained, experienced interpreters in 2010. This amounted to 944 hours of help for things like banking and parent teacher interviews at their children's school.
- The **Supported Employment Program** at COR Enterprises Inc. was able to provide **4,160** hours of direct service delivery to adult individuals living with a developmental disability, as well as **9360** hours of individual work and volunteer experience.

Three Steps To a Successful Workplace Campaign

- Learn
- Build a Team
- Analyze & Set Goals
- Timelines
- Preparation & Awareness
- Kick-off
- Canvass
- Special events
- Manage & Monitor
- Wrap-up
- Recognition
- Thank You – Rule of 7

Find out how to use these steps to launch a winning campaign.

1. Plan

Learn about United Way

Learn as much as you can —this will help you answer questions you may be asked

- Review this guide, brochure and other promotional material
- Meet with your United Way Staff Partner or Loaned Representative
- Visit the United Way website at www.brandonuw.ca
- Organize/Attend a United Way Training event

Build a Team

An ideal committee should include representation from each department; union and management; and encourage a mix of past experience and new ideas

- The size and make-up of your committee will vary depending on the size of your workplace
- Bring together committee members and decide who would be best suited to oversee the five key areas: Payroll Deduction / Canvass, Financial reporting, Events, Promotion & New Initiatives
- Leadership chair– if you have 5 or more donors giving over \$1,000 you should have a leadership chair to follow up with and thank these donors.

Analyze and Set Goals

The basis for all successful campaigns is building on successes and developing key strategies to enhance your campaign

- Develop key strategies by reviewing past campaigns.
- Work with committee members to analyze SWOT (strengths, weaknesses, opportunities and threats), overall participation rate and average gift, leadership gifts, successful canvass, special events.
- Work with committee to establish goals: financial, participation rate, or average gift.

Develop a Plan & Timeline

A detailed plan with timeline will save you stress and confusion!

- Finalize a short-term and goal oriented campaign and put it down on paper for committee members.
- Develop a timeline. Follow this throughout your campaign to ensure everything that has to be done – is done, and on time.
- Develop 3 key priorities for your workplace campaign.

Preparation and Awareness

Find ways to create awareness and make sure you have everything you need for the Campaign

- United Way will provide a kit, which will contain pledge forms, promotional materials (brochures/flip cards), agency guides, posters and return envelopes.
- Personalizing pledge forms is an easy and effective way to ensure that all employees are canvassed.
- Supplies such as campaign videos, balloons, stickers, and thermometers are available on request from your staff partner or loaned representative.

2. Implement

Kick-off

Mark the start of your in-house campaign—let people know it's campaign time. Choose a date to kick-off your campaign and mark the occasion in some way. This can be as simple as an email message to all employees or a brief staff meeting with an agency speaker presentation. It could be a barbecue or a pizza day. Use your creativity and remember, food is a great way to get attention.

- Your Kick-off is an excellent opportunity to create awareness about the United Way and also what you have planned for your campaign.
- Don't forget to ask for a United Way and/or agency speaker.
- Posters are available to promote your event.

Canvass

Canvassing is the most critical component of your success

- Recruit a canvassing chair if you have multiple locations or more than 5 canvassers.
- Employee to canvasser ratio – 10:1 or 15:1
- Organize a training and orientation session for all canvassers—even those who've done it for years. This will help them answer questions that may come up during the campaign.
- Set specific dates to begin and also to wrap-up the canvass. It is very important that your canvassers are aware of those dates and that they are expected to complete their portion within the defined timeline.
- Research has shown that a shorter, more intensely run canvass is more successful than one that happens leisurely over several weeks. **Two or three weeks** is recommended depending on the size of your workplace.

Special Events

Special events are a great way to boost morale and have fun. Just make sure they don't cut into your canvass time

- Frame your campaign with your special events. Your kick-off could take the form of a special event with the emphasis on awareness.
- After the canvass portion of the campaign has been completed is the best time to run any other special events you may have in mind.
- Protect your canvass time—ensure that special events do not clash with your employee canvass.

Manage & Monitor

Establish a system to ensure that all employees are canvassed—**the number one reason people don't give is because they weren't asked**

- Have a committee member responsible for monitoring the progress of your campaign.
- Develop a system for team leaders to stay in contact with your canvassers and be available to troubleshoot or answer questions.
- Provide ongoing communication of results to both the campaign team and co-workers.
- Don't forget to follow up with employees who may be away on vacation.
- Have your leadership chair follow up with people who gave \$1,000+ in the past

3. Wrap-up

Wrap-up & Recognition

Finally, thanking everyone and wrapping up a successful campaign is an important part of every campaign plan

- Make sure that everybody is aware of success of the campaign.
- Thank your campaign committee and canvassers, and don't forget to thank all employees. Think of creative ways to say “thanks” - make it fun!
 - E-mail

- Speaker
 - Cheque presentation
 - Reception/event
 - Announce totals raised
 - CEO/ECC personal thanks
 - Cards
- Build your wrap up and recognition event into your campaign plan.

		Activity	To Be	Completed
PLAN			By When	By Whom
	Learn about United Way	Program and Services Information		
		Agency Speakers		
		UW Staff Partner/materials		
	Build a Team	Identify Committee Structure		
		Committee Recruitment		
		Committee Meeting/Training		
		Leadership Chair		
	Analyze & set goals	Review History		
		Re-visit strategies and goals		
		Areas of potential - retirees/new hires/ leaders/friends		
	Develop a plan & timeline	Kickoff & Touchdown		
		Payroll Canvass:		
		Develop timeline - 2 week canvass		
		Recruit coordinators		
		Recruit canvassers		
	Preparation/Awareness	Preprint pledge cards		
		Endorsement from CEO/unions if applicable		
		Package materials		
		Canvasser Training		
IMPLEMENT				
	Kickoff event	Barbecue/Event/Dress down		
		Agency Speaker		
		Promotion of kickoff		
	Canvass	Canvassing by shift and department		
		Retiree canvass		
		Leadership canvass		
		New Hires		
	Special Events	Decide which to keep		
		Timeline events so they don't interfere with canvassing time		
	Manage & Monitor	System/procedure to collect envelopes		
		Tracking of employees to be canvassed		
		Follow up with canvassers/team leaders		

WRAP-UP				
	Wrap up & recognition	Thank committee		
		Thank canvassers		
		Announce results - thank donors		
		Touch Down		
		Appreciation		

Resources/Tools to help you succeed

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

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

Training/Orientation sessions: Sessions in which UW staff and loaned representatives share with proven strategies, tips, best practices and easy ways to use ideas to help you succeed.

Agency speakers: Volunteers, clients and staff of United Way funded programs are available to share personal stories to help your employees appreciate how important their support is.

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

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

Presentation materials: Videos, CD's, PowerPoint presentations are available upon request. Signage is available on loan from the UW office

Print materials: pledge cards, brochures/flippies, agency guides, posters, are available, free of charge, to help you promote the value of United Way

Frequently Asked Questions

What is United Way and how is giving to United Way different from giving to other charities?

United Way is the most efficient way for donors to make the greatest impact in their local community. The United Way identifies the need by conducting research to ensure that the programs and services being funded are critical, effective and cost-efficient. United Way invests resources in programs and services focused on prevention, intervention and support. We continually monitor the effectiveness of funded programs and services. United Way is able to respond to new & emerging needs in the social services field.

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

United Way keeps fundraising costs to a minimum thanks to community partnerships and thousands of volunteers. Our audited financial statements show our administration costs to be 15.3 percent including fundraising and operations.

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

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

I live outside of Brandon. Where will my donation go?

Many United Way programs benefit people throughout the Westman area, however, you can designate your donation to any specific United Way community or a specific charity (funded or non funded agency) by indicating your choice on your pledge card.

My spouse gives at work. Why should I give?

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

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

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

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

There are many agencies that United Way funds that provide essential services to one in three local residents. Why penalize all of them because of one agency? You could either "negatively designate" your funds to ensure that none of your gift is donated to that particular agency, or you may also take advantage of the Donor Choice option on your pledge card to designate your gift exactly where you would

like it to go.

What is United Way's relationship with Organized Labour?

Canadian Labour Congress (CLC), has been a valued partner with United Way Centraide Canada for over a century. At the national level, there is a formal agreement which sets out a series of principles forming the basis of an on-going relationship. In Brandon & District, Labour has been represented on the United Way Board of Directors, campaign cabinet and other committees.

Enhancing your campaign

Increasing Participation

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

Planning:

- A meeting with your staff partner at United Way has been scheduled to review previous results and identify areas of opportunity, strengths and challenges.
- Events are timed to protect the canvassing period.
- An awareness plan is in place including group information sessions, agency tours and/or agency speakers.
- There is a plan in place to thank all donors, volunteers and employees to ensure high participation in the following year.

Recruitment:

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

Workplace Canvass & Support:

- Management and union leadership supports campaign and provides visible support along with adequate time for volunteers.

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

Employee Campaign Committee

The workplace campaign is the key to fundraising for the business community. United Way does not canvass door to door, so workplace campaigns form the backbone of our ability to fund vital community needs. The ECC and committee members work closely with their United Way staff partner/loaned representatives to ensure that the UW canvass runs within established timelines and that workplace campaigns utilize strategies and best practices.

Sample Committee Structure

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

One individual who is designated as the liaison between the United Way and the workplace

Representation on the committee from different areas of the workplace including any different sites, different departments, job category and Union representation if applicable.

Optimum canvasser/employee ratio is 10 or 15 employees to be canvassed for each canvasser.

One Day Blitz

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

5 Steps to a Successful Blitz Campaign

1. **PREPARATION:** This is the most important step to realizing a successful Blitz campaign. The campaign will run smoothly if you have invested the appropriate amount of time to this step and have all of the pieces of the puzzle in place well in advance of the campaign. Some of the things you should do to be well prepared are:

Segment your workplace in advance by physical department, job type, union or shift. Decide which areas will benefit from the blitz and which would benefit more from a different style of campaign.

Orientation for the Committee and Canvassers is crucial. All volunteers need to be aware of the process and schedule for the day and also aware and comfortable answering questions about United Way and the programs that they support.

Make sure that you have the support of management and union leaders in place early.

Prepare personalized pledge forms or a canvassing list to ensure all employees are accounted for. This allows for easier tracking for follow-up canvassing.

Develop awareness materials including letter/memo either from the committee, management or a joint memo from both.

2. **PROMOTION:** The most important thing to keep in mind is to make sure that all employees are well aware in advance of the blitz that it will be taking place, when it is happening and what will be expected of them on the day of the blitz. There are several critical steps you can take to ensure that this communication has been successful:

A letter of support for the upcoming campaign should be sent to all employees from management well in advance of the campaign, encouraging them to participate. This could also be a joint letter from management and labour leaders and/or the committee. Letters can be sent to all staff or posted on Staff bulletin boards or as part of an internal e-newsletter if the company produces one.

Information regarding the logistics of the Day or Week of the Blitz also needs to be

communicated to the work population so that they are aware of the schedule of events for that day. This information can be distributed at staff meetings, through the company newsletter, union meetings, staff bulletin boards, broadcast fax or email.

Posters promoting the upcoming campaign should be visible throughout the workplace for the week prior to the campaign.

A reminder that works well the day before the campaign is some form of a hand out as employees arrive for their shift.

Offer prizes, incentives or draws to encourage attendance at blitz sites. It is suggested that you also communicate the idea that any returned pledge form whether they are giving or not is eligible for prizes.

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

Agency speakers are the most effective way to bring the United Way message and a personal connection to the programs and services that are funded.

A brief message from management and/or the campaign coordinator can help to supply more information regarding the process, how their particular workplace can play a strong role in the community and why they feel it is an important campaign to support.

Agency materials could be readily available.

United Way staff could be present to help answer any questions that the canvassers/volunteers have trouble answering.

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

Election style booth can be set up to ensure privacy.

Volunteers are well prepared to answer questions both about how the form is to be filled out but also any other question employees may have about donor choice etc.

Employee lists must be available to ensure accurate monitoring of which employees have filled in their forms.

Management has assured employees that they will be given and encouraged to take the time to participate.

5. FOLLOW-UP: This is a crucial step to ensure that you have maximized your potential for participation.

Accurate employee lists and monitoring during the canvass is very important. All canvassers are responsible for identifying which employees within their segment of the workforce who have not yet participated.

Canvassers should be given firm timelines on the follow-up portion of the campaign.

Make sure that you communicate how the campaign is doing to the entire workplace. People enjoy knowing that they have participated in a successful campaign.

Thank everyone for their time, for their participation and for their generosity. This can take the form of personalized thank you's from each canvasser to those employees within their segment, or a communication from the committee to the entire workforce or both. This is the most important step in the process.

Checklist to a Successful Blitz Campaign

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

Campaign Events

Events can be an important part of your campaign. They help:

- create awareness
- motivate employees to participate,
- promote team spirit
- raise funds

Before planning your event go through this simple exercise.

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

When: Time your events carefully so they do not interfere with the payroll campaign. Most funds are raised through cash or payroll deduction — people may feel they have given to the United Way if they have just purchased a ticket or a hot dog. Check with your Employee Campaign Coordinator on the dates for your workplace canvass.

Where: Once you've decided which events you will run, work out how much space do you need for your event. There may be opportunities within the community for donated space. Remember, the more you can save in expenses, the more funds you can raise for your community. Speak to your United Way staff partner/loaned representative for ideas.

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

How: Planning is essential for events. Give yourself lots of extra time to ensure you cover all the details including obtaining licenses. Recruit volunteers to help with events. A checklist and some tips are included in this guide to help you. Remember, events are resource intensive but can be a lot of fun!

Some Tips to Successful Events

- Recruit an events chairperson to be a part of your campaign committee. Campaign Events need an energetic, creative individual who can allocate enough time.
- Involve as many employees as possible. Make sure that your events are accessible both in their timing and the chosen location and also that they have a broad appeal to all employee groups within your workplace.
- Use campaign videos, posters, flags and balloons to give your event a festive appeal. Ask

your staff partner for any supplies you need.

- Communicate with management well in advance to ensure that your plans do not interfere with any restrictions or guidelines the company may have. Make sure that management/ Union Leaders are invited to participate. Their presence can add an official stamp of approval to your campaign.
- Timing of the promotion of your event can be crucial. Too far in advance and employees will have forgotten about it by the time it arrives. Too little notice may prevent people from being able to schedule the time to participate.
- Have a plan 'B' ready for things like inclement weather or poor ticket sales.
- Make sure that you are aware of all government guidelines regarding both solicitation of donations/prizes and also receipting.
- HAVE FUN !!!

Some Ideas for Great Events

Miniature Golf Tournament

- Set up workplace as a mini golf course incorporating hallways, staircases, swinging doors, elevators, etc. Each department can be given a hole to decorate – try a theme
- Employees pay an entry fee to compete either individually, or on teams over a lunch hour
- Have employees bring in putters and golf balls
- Award prizes for fun things – furthest from the hole, most noise, hole-in-one and longest putt

Employee Cookbook

- Solicit favourite recipes from the staff - Ensure there are a variety of different types of dishes
- Compile all recipes into a cookbook to be sold to employees, family and friends
- You could produce the cookbook in-house.
- Keep printing costs in mind when setting the price – you don't want to lose money on this event

A Day Off with Pay Raffle

- Ask management if they will agree to pay an employee's wage for a day that he/she does not work
- Raffle tickets are sold to employees, with the grand prize being a day off work
- As additional draws, second and third prizes can be secured
- Works well in conjunction with the employee campaign to encourage payroll deduction

Rent a Boss

- Hold an auction where employees bid for services provided by managers (car washes, office clean up, cook and serve a gourmet meal, golf buddies, worker for an hour...)
- Easy event to hold during lunch hour in the cafeteria or a lunch room

Dressed This Way for United Way

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

Office Olympics

- Employees pay an entry fee to participate in various office events – pencil toss, human paperweight, computer quiz, office chair relay
- Managers could issue challenges to other departments and serve as team captains or judges
- Points are awarded for speed and accuracy – the team with the most points wins overall
- Request management's approval to set aside a day or afternoon of the week
- Have a comprehensive plan in place that outlines what to expect
- Set-up a central scorekeeper to track results

Parking Spot Raffle

- Raffle off a "choice" parking spot from work i.e. closest to the entrance, President's/CEO spot
- Raffles can be for a month, the winter, the year
- Have a sign indicating "United Way winning spot parking only"

Car Wash

- Set-up car wash in convenient location for employees and/or general public with easy access to an appropriate water source
- Have enough cleaning supplies available (sponges, pails, soap, water)
- Management and employees volunteer their car washing skills – with enough volunteers you can do this in one or two shifts
- Hold an auction among staff members to have their car washed by the CEO (You would be surprised how much money that alone will raise!)
- Be sure to check with restrictions on watering bans before the car wash

More Great Ideas for Events

These ideas were collected from Employee Campaign Coordinators at a variety of workplaces.

Scavenger Hunt

Car Wash

Garage Sale

Head shaving

Meet & Greet

Other Ideas

Reverse Lottery

Soccer Game

Balloon Lottery

Box lunch auction

Raffle homemade items

Food Cart

Chinese Auction

Are You Smarter Than a 3rd Grader?

Theatre Nights

Pep rally

American Idol

Book, CDs, videogame Sale

Poker Run

Jail n' Bail

Silent Auction

Loose change day

Vendors donate profits

Calendar

Baby picture mystery

Talent show
Car rally
Domino Theatre Night
Balloon day

Sports

Bowling tournament
Scavenger Hunt
Golf tournaments
Baseball tournaments
Lunch-time Hoops
Floor Hockey
Strongman competition

I'm Dressed this way for United Way Days

Hat Day
Certain Color Day
Retro Day
Nerd Day
Costume Day
Tacky Tourist Day
Halloween Costume

Hot Tickets!

Bingo, Bing-e (email bingo)
50/50 tickets
Raffle a day off with Pay
Themed basket raffle
Boss work your job
Canadian Tire money (jar guessing)
Lottery ticket raffle
Pool to guess workplace campaign goal

Team Building

Campaign poster contest "Guess the Baby Picture"
Canadian "Office" Idol Karaoke competition
Survivor Challenge
Pumpkin Carving Contest
Office Olympics

Canada Revenue Agency Guidelines for Receipting

General Rule:

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

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

Donations that are RECEIPTABLE:

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

Donations that are PARTIALLY RECEIPTABLE

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

Donations that are NOT RECEIPTABLE:

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

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



United Way
Brandon & District

www.brandonuw.ca

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