

Workplace Campaign Canvasser Guide

Your Guide to Success as a Workplace Canvasser
With the United Way of Fort McMurray

I Believe in My Community

September 9—November 23, 2011



United Way Anthem

I believe in my community.
I believe that its success depends on the people who live in it.
That everyone has something to contribute.
That everyone deserves respect.
That everyone's potential can be realized.
That diversity is vital.
That every person has value.
That everyone needs help and everyone can offer help.
That a safe, supportive community is everyone's responsibility.
I believe in possibility.

Thank You for Volunteering!

You are making a difference by volunteering your time to help the community. This guide has been put together to help volunteers run the best campaign possible.

If you have any questions contact the United Way office at 780-791-0077 or campaign@fmunitedway.com. Remember, we're in this together.

What is the 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. The United Way of Fort McMurray began in 1979 when \$83,000 was raised to support social services throughout this region.

Accountability

When you give to the United Way, you can rest assured that your gift will be invested wisely, reaching every sector of the community and addressing multiple needs.

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

Our Community Fund supports a vital network of agencies and programs operating in our community. Our volunteer Community Investment Committee evaluates every agency that applies for funding to ensure that your donation is invested where it can have maximum impact. Every year, experienced volunteers and professional staff review United Way member agencies to ensure they fulfill stringent guidelines.

United Way provides funding to three priority areas:

- All That Kids Can Be
- Healthy People, Strong Communities
- From Poverty to Possibility

Additionally, United Way believes in community impact — a focus on creating meaningful, long-term improvements to the quality of life in our community.

Frequently Asked Questions:

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

United Way is the most efficient way for donors to make the greatest impact in their community. The United Way conducts research to ensure that the programs and services being funded are critical, effective and cost-efficient. The United Way invests resources into programs and services focused on prevention, intervention and support. We continually monitor the effectiveness of funded programs and services. The United Way is able to respond to emerging local needs. Additionally, United Way focuses on Community Impact— a big picture way of thinking that attempts to combat the root causes of social issues, not just the ramifications.

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

United Way keeps administrative costs to a minimum thanks to community partnerships and thousands of volunteers. Our audited financial statements show our fundraising and admin costs to be 10 per cent.

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

United Way does not provide 100 per cent funding for any one program or to any one member agency. Ensuring a healthy variety of supporters ensures sustainability and viability of all United Way funded programs and services. It also ensures that multiple stakeholders have an opportunity to give input into multi-dimensional issues.

My spouse gives at work, why should I give?

You can combine your gifts for favourable tax credits and recognition. Through payroll deduction, one smaller gift added to another equals an effortless way to give a larger gift.

Doesn't the government provide money to help these agencies?

While many government departments do fund or purchase services offered by these agencies, the United Way is the only stable source of funding for many programs.

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

United Way is a network of care you can support now so essential programs and services are available in the event 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 in your community. United Way funded programs reach into all sectors of our society, and include vital services such as mental health aid, search and rescue recovery and even grief and bereavement support. Whether it helps your neighbour cope with vision loss or provides your child with an engaging after-school activity, we all benefit from a healthy, supportive community.

I don't want my money to go to one of the member agencies.

There are many agencies the United Way funds that provide essential services. However, the United Way sincerely believes in the donor's right to choose. You may take advantage of the Donor Choice option on your pledge card to designate a portion of your donation to or from an agency.

When will I get a tax receipt for my donation?

If you give through payroll deduction, your contribution will be on your following year's T4. Whether you give by cash, cheque or credit card, your tax receipt will be mailed to your home address by February 28 of the following year. Please ensure you complete the home address section of the pledge form if donating by cheque, cash or credit card as this information is required by CRA regulations.

When will the agency receive my designated donation?

Your donation will be sent to the agency in four quarterly payments over the following year.

What if I live outside of Fort McMurray?

We encourage you to consider supporting our local community. However, you can designate your donation to any community United Way or to a specific registered charity by indicating your choice on your pledge card.

Four Steps to Successful Canvassing

The most effective method of fundraising is face-to-face canvassing. There are four basic steps to success.

- Step 1: PREPARE
- Step 2: ASK FOR THE GIFT
- Step 3: THANK YOU
- Step 4: FOLLOW-UP

Prepare

Learn about the United Way before you begin asking co-workers for their donation. You must be able to answer basic questions and concerns and have appropriate information ready.

- Attend a canvasser training session.
- Review and become familiar with the information in the materials.
- Visit United Way agencies to learn more about their programs and services.
- Ask any questions you may have about the United Way during training.
- Call the United Way office or ask your Workplace Campaign Chair (WCC).
- Find out about your own workplace campaign history.
- Visit our website at www.fmunitiedway.com.

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

- Prepare personalized pledge forms. Your workplace may provide personalized pledge forms, otherwise write or type the names on the forms. This is also a very simple way to track the employees you have already canvassed. If you have forms left they will have the names of those still left to canvass written on them.
- Consider your own personal reasons for giving and make your donation.
- Schedule brief canvass visits with employees, taking into consideration the best times to meet with them. Make sure you aren't interrupting them.
- Start with people with whom you have a good relationship or who are past donors. This will help build confidence and momentum. The number one reason people don't give is that they weren't asked.

Ask for the Gift

- **Set the tone:** Thank your colleague for agreeing to speak to you and for his/her past support (if the information is available). Explain that the purpose of the visit is to talk about the United Way, the workplace campaign and to ask for their support.
- **State the Case:** Explain your personal reasons for supporting the United Way and also outline some key messages about the United Way's impact on the community. Include any pertinent information that you feel would appeal to the potential donor: the types of agencies that receive funding, the low administrative costs, the abundant use of volunteers to run the campaign or the accountability and strict Code of Ethics followed by United Way and its member agencies.
- **Ask for the Gift:** Present each person with their personalized pledge form and a brochure, and ask them to consider supporting the campaign. Don't forget to explain the benefits of giving through payroll deduction.
- **Let Them Know:** That you are hoping for an early response, but you would be glad to give them the time needed to make their decision.
- **Ask Them:** If they have questions and make sure that you respond, even if you don't know the answers right away.

Thank You

It is important to thank everyone, even those people who do not donate. Thank people for their time and their contribution. Remember, the impression you leave is the one people will remember when they think of United Way.

You may thank in person or send a thank you note. Work with your WCC to organize a system to ensure donors are thanked.

Follow-Up

Ensure everyone has been given an opportunity to participate in the campaign.

Keep track of anyone who was away on vacation or sick leave and make sure they have been canvassed before you close your campaign.

Also, make sure anyone who had questions receives a reply. Once you have decided that your canvass has been completed, compile the results and pass them along to your WCC.

If you are acting as the WCC and canvasser you will want to ensure the achievement is announced to the entire workplace. It can be included as part of the thank you or you can make a more formal announcement. Some offices have a budget for an employee campaign appreciation gathering.

Canvasser Checklist

- Meet with Workplace Campaign Chair (WCC).
- Attend a canvasser training session.
- Read United Way material and visit the website.
- Visit United Way agencies and programs.
- Join a United Way "Seeing is Believing" tour.
- Identify the employee group to be canvassed.
- Prepare personalized pledge forms.
- Make your own donation.
- Meet with each employee on the list.
- Follow up with any questions that need answers.
- Thank all employees for their time.
- Follow up with previously absent employees.
- Ensure all forms are filled in correctly and forward to WCC or treasurer.
- Communicate campaign results to all employees.

Filling Out the Workplace Pledge Form:

Section One: *PLEDGE FORM– Please Print Clearly*

Link to another donor: For individuals who wish to join their gifts, please fill in your partner's information on the reverse.

Section Two- *My Campaign Gift*

Payroll Deduction: Please enter the dollar amount multiplied by the number of pay periods. Fill in total amount.

Credit Card: Please enter amount and include expiry date. This can be chosen to provide a one-time gift or a monthly donation.

Securities: There can be no transaction until all details are clarified with donor. Donor must contact their financial advisor and the United Way office.

Signature: All pledge forms must be signed and dated by the donor.

Total Gift: Please add the total gift being pledged.

Anonymity: If the donor wishes to remain anonymous ensure they check off the box indicating "please do Not print my name in recognition."

Section Three- Designating the Gift

Community Fund: This is the most effective use of a donor's gift. It provides the broadest range of support and addresses the areas of greatest local need. Please fill in the amount being directed to this fund.

Targeted Impact: The donor may choose to have a portion of their gift distributed to a specific priority area over any others. Please mark clearly.

Any Registered Canadian Charity: This can either be one of our member agencies or another Registered Canadian Charity. Please include the charitable registration number. This option is available for a small processing fee to distribute funds to the designated agencies. *Please note: Only United Way funded charities are monitored by the United Way.*

Additional Tips and Information:

All gifts should be accompanied by a pledge form even if they don't require a receipt. Special event proceeds do not need a pledge form.

Your internal payroll department receives the yellow copy of the pledge form and the United Way receives the white copy.

Payroll deduction receipts appear on the employee's T4. All other gifts of \$25 or more will automatically receive a charitable tax receipt.

Always Making the Right Decision:

The funding streams offered through the United Way provide opportunities to member and non-member agencies in the community and encourages them to be innovative and entrepreneurial in their response to social needs. Funding requests are carefully screened by a local volunteer committee.

All United Way financial affairs are subject to an annual audit by an independent accounting firm.

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

Donors may wish to designate a portion of their contribution to a specific area or agency.

Donors can choose from the following options:

- The Community Fund (offers maximum impact)
- Targeted Impact (areas of priority need)
- Registered Canadian Charities (member and non-member)

All designations are paid over and above any allocation an agency receives. For non-member agencies, a 15 per cent processing fee applies.

United Way Member Agencies & Programs

All That Kids Can Be

Anzac Lil Lakers Family Resource Centre
Cindy McIntosh, Executive Director
Tel (780) 334-0734
cmcintosh@lillakersfrc.com

Boys & Girls Club
Gayle Phillips, Executive Director
Tel (780) 791-7775 Fax (780) 791-0088
execdirector@fmbgc.ca

Fort McMurray Historical Society– Summer Camp Subsidy
Roseann Davidson Executive Director
Tel (780) 791-7575

Girls Incorporated
Ann Dort-McLean, Executive Director
Tel (780) 790-9236
girlsinc@altech.ab.ca

Justin Slade Youth Foundation
Lesley Peckford, Executive Director
Tel (780) 715-0010 Fax (780) 799-5807
information@jsyf.ca

Nistawoyou Association Friendship Centre
Yvette Elmquist
Tel (780) 743-8555
executivedirector@shawcable.com

Stepping Stones Woods Homes Youth Services
Tel (780) 750-2252
dan.edwards@woodshomes.ca

Healthy People, Strong Communities

Canadian Mental Health Association
Karen MacMillan, Executive Director
Tel (780)743-1053 Fax (780)743-0959
admin@woodbuffalo.cmha.ab.ca

CNIB
Tel (780) 488-4871 Fax (780)482-0017
bonnie.beattie@cnib.ca

Canadian Paraplegic Association
Alisha Towsley
Tel (780) 743-0307
alisha.towsley@cpa-ab.org

The Children's Centre
Ruby Canning, Executive Director
Tel(780)743-3309 Fax(780)743-1995
ccenterm@telus.net

Family Crisis Society
Mary Ellen Proctor, Executive Director
Tel (780) 743-4691 Fax (780) 791-0358
Fcs.admin.assist@shawcable.com
Fcs.e-d@shawcable.com

Golden Years Society
Tel(780)743-4088 Fax (780)743-5063
Gys.1976@shawbiz.ca

The Hub Family Resource Centre
Bonnah Carey, Executive Director
Tel(780)791-7110 Fax(780)743-8516
ed@thehubfrc.ca

Mark Amy Treatment Centre
Menno Friesen, Executive Director
Tel: (780) 334-2398
mfriesen@onehealth.ca

McMan Family and Community Services Association
Jack Smyka, Programs Director
Tel: (780) 750-9723
Jack.smyka@mcman.ca

Multicultural Association of Fort McMurray

Alan Delotavo, Executive Director
Tel (780) 791-5186
alan@mcmurraymca.com

Pastew Place Detox Centre

Janice Porth, Executive Director
Tel (780) 791-2525 Fax (780) 791-0358
ppdcs@shaw.ca

Search & Rescue Society

Dan Lines
Tel (780) 743-0361
danlines@shaw.ca

Some Other Solutions

Karen Gooden, Executive Director
Tel (780)743-8605 Fax (780)791-0702
director@someothersolutions.ca

Society for the Prevention of Cruelty to Animals (S.P.C.A.)

Catherine Stevenson, Executive Director
Tel(780) 743-8997
cstevenson@fortmcmurrayspca.com

Volunteer Wood Buffalo

Erica Hornsey, Executive Director
Tel (780) 750-4333
info@volunteerwoodbuffalo.ca

Wood Buffalo HIV & Aids Society

Tel (780) 743-9200

YMCA of Wood Buffalo

Sonya Earle, Senior Director Child Care and VP Operations
Tel (780) 790-9622
Sonya_Earle@ymca.ca

From Poverty to Possibility

Centre of Hope

Amanda Holloway, Executive Director
Tel (780) 743-3912 Fax (780) 743-3628
cohedna@shaw.ca

Salvation Army Community Services

Tel (780) 743-4135 Fax (780) 791-2909
sa.start@shawcable.com

Support Through Housing Team (STHT)

Tel (780) 748-1239
stht@live.ca

Building Capacity Through Community Partnerships and Projects

C.O.W. Bus (Classroom on Wheels)

Day of Caring

Employee Assistance for Member Agencies

Executive Director Roundtable

Homelessness Initiatives Strategic Committee

The Nonprofit Sector LINK

Reinalie Jorolan
Tel (780) 791-0077
network@fmunitedway.com

The Redpoll Centre– *Nonprofit Shared Space*

redpollcentre@fmunitedway.com

Tools for School

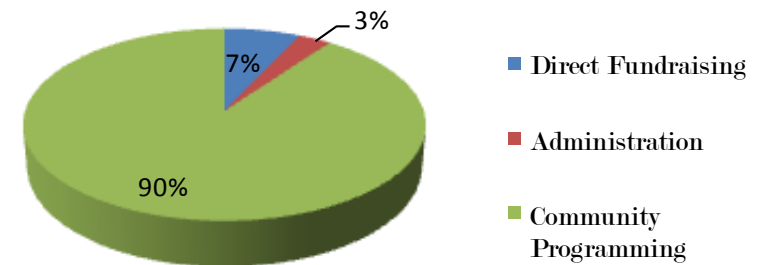
University of Waterloo and Suncor Energy Foundation Strategic Partnership

The Impact of Donor Dollars

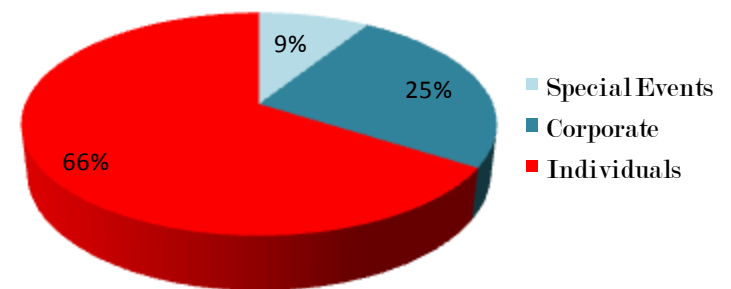
- **\$5** per pay period helps Unity House provide a bed for a homeless woman for one month. Her stay may include food, lodging, clothing, childcare and counseling.
- **\$9** per pay period will provide the materials to train five new search and rescue workers.
- **\$11** per pay period will provide a youth with the opportunity to take part in the No Limits Youth Empowerment Day, a full day conference through the Justin Slade Youth Foundation.
- **\$18** per pay period helps to keep the doors open to the Nistawoyou Association Friendship Centre, which runs programs focusing on aboriginal youth.
- **\$25** per pay period helps a STHT client move from transitional housing to their own apartment.
- **\$30** a pay period will provide five Canadian Mental Health Association community presentations to outlying areas.
- **\$40** per pay period can house two individuals with chronic mental illness for two months in a safe, supportive environment.

Your Dollars Build Community

Community Investment



Campaign Income by Source Individuals Make the Difference



*Data collected from 2010 Campaign

Tax Credits of Charitable Giving

In addition to the personal, social and community benefits of giving to United Way, you can also claim significant federal and provincial charitable tax credits for your donation. Your donation of cash, securities and other assets are all eligible for tax credits. The amount donated will impact the amount you receive in a credit.

Tax credit amounts will vary for each individual based on their personal income level.

For more information on Canadian Tax Credits and for a Charitable Donation Tax Credit Calculator please visit:

www.cra.gc.ca/donors

United Way Fast Facts

Our Mission is to improve lives and build community by engaging individuals and mobilizing collective action.

United Way Aspires to...

- Energize and inspire people to make a difference.
- Provide meaningful opportunities for individuals to realize their potential through volunteerism.
- Reflect the diversity of the communities we serve.
- Craft human care agendas within and across our communities.
- Build coalitions around these agendas.
- Increase investments in these agendas by expanding and diversifying our own resource development and fundraising effort while supporting those of others.
- Ensure our investments have recognizable impact.

United Way is a Community Builder...

- Working together with individuals and organizations to build a stronger community.
- United Way dollars stabilize local agencies and resources through training, development and strengthening of the voluntary sector.
- Using a Community Impact strategy to address to root causes of local issues.

Benefits of Giving to United Way...

- All donations raised for our community stay in our community.
- A volunteer review process directs funds to where services are needed most.
- The donor is assured of the integrity within all United Way of Fort McMurray agencies.
- United Way supports a broad range of agencies, services and programs.
- Our overall administration costs are 10 per cent.

Efficient Fundraising...

- Member Agencies work together on a community-wide fundraising effort.
- Fundraising expertise within United Way along with volunteer efforts to fundraise ensure effective, low cost fundraising.

Important Campaign Dates

Thank you in advance for your continued efforts towards the 2011 Community Campaign in support of your United Way.

Please join us for these upcoming events:

- **September 9th**, 2011 Community Campaign Kickoff
- **November 18th**, 2011 Community Campaign Finale
- **November 23th**, 2011 Volunteer Recognition Event

Campaign details and updates can be found on the United Way of Fort McMurray website at:

www.fmunityway.com

I Believe in My Community

The United Way of Fort McMurray

The Redpoll Centre
200, 10010 Franklin Avenue
Fort McMurray, AB
T9H 2K6

Tel (780) 791-0077

Fax (780) 791-0088

Email: campaign@fmunityway.com



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