

“I Believe In Possibility!”

September 10–November 20, 2009



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: info@fmunitedway.com

Office hours: Monday-Friday 8am-4pm

Workplace Campaign Canvasser Guide

An effective guide to help you
succeed as a workplace canvasser

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

Successful Children & Youth (Youth Services)

Boys & Girls Club

36 Reidel Steet,
Fort McMurray, AB, T9H 3E1
Tel (780) 791-7775 Fax (780) 743-9359
execdirector@fmbgc.ca

Justin Slade Youth Foundation (The Dugout)

Marie Ralph, Chairperson
P.O. Box 5886,
Fort McMurray, AB, T9H 4V9
Tel (780) 715-0010 Fax (780) 799-5807
dugoutadmin@telus.net

Girls Incorporated

Ann Dort-McLean, Executive Director
10011 Franklin Avenue
Fort McMurray, AB, T9H 2K7
girlsinc@altech.ab.ca

Stepping Stones Youth Home

Vaughn Jessome or Kat Danbert
102 McConachie Crescent
Fort McMurray, AB T9K 1T1
Tel (780) 713-7006
v.jessome@shaw.ca, Kat.Danbert@woodshomes.ca

Young Life Fort McMurray

Laura Werner, Director
18-100 Albion Drive,
Fort McMurray, AB, T9H 1M1
Tel (780) 715-1993

Some Other Solutions

Karen Gooden, Executive Director
9908 Manning Ave,
Fort McMurray, AB, T9H 4V9
Tel (780)743-8605 Fax (780)791-0702
director@someothersolutions.ca

Victim Services Unit

Laura Barnes, Executive Director
P.O. Box 5712,
Fort McMurray, AB, T9H 4V9
Tel (780)799-8874 Fax (780) 790-0600
fortmcmurrayvsu@telusplant.net

Marshall House

Joselyn McGrath, Manager of Marshall House
9011-9915 Franklin Ave, Fort McMurray, AB,
T9H 2K4
Tel (780) 799-4040
joselyn@wbhadc.ca

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 info@fmunitedway.com
Remember you are not alone**

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 serving Fort McMurray began in 1979 when \$83,000 was raised to support human care services throughout this region.

Accountability

When you give to The United Way, you can rest assured that your gift will be invested wisely. 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 Fort McMurray, the United Way is accountable to you and the community.

Our Community Fund is made up of a network of programs and services delivered by member agencies. 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.

In addition to the Community Fund, based on local research on emerging needs, United Way provides grants to these identified priority areas:

- Healthy Families & Seniors (Community Services)
- Self Reliant Individuals (Health & Welfare)
- Safe Homes & Neighbourhoods (Crisis Services)
- Successful Children & Youth (Youth Services)

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 identifies the needs by conducting research to ensure that the programs and services being funded are critical, effective and cost-efficient. The United Way invests resources in 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 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 partnership and thousands of volunteers. Our audited financial statements show our fundraising costs to be 11 percent, including administration. An Imagine Canada survey reports that the average fundraising costs for non-profit organizations in Canada are around 21 percent.

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 member agencies, the United Way does not provide 100% funding for any one program or to any one agency. This is to ensure sustainability and viability of all United Way funded programs or services.

My spouse gives at work. Why should I give?

United Way volunteers suggests 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 favourable tax write-offs and recognition.

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

United Way itself does not receive government funding. Many government departments fund or purchase services from United Way agencies. United Way is the only stable source of funding for some agencies.

Safe Homes & Neighbourhoods (Crisis Services)

Centre of Hope

Edna Moman, Executive Director
1 McLeod Street,
Fort McMurray, AB, T9H 1Z4
Tel (780) 743-3912 Fax (780) 743-3628
cohedna@shaw.ca

Family Crisis Society

MaryEllen Proctor
P.O. Box 6165,
Fort McMurray, AB T9H 1Z4
Tel (780) 743-4691 Fax (780) 791-0358
Fcs.admin.assist@shawcable.com

Pastew Place Detox Centre

Ann Hurley, Executive Director
505 Sakitawaw Trail S,
Fort McMurray, AB, T9H 4P3
Tel (780) 791-2525 Fax (780) 791-0358

Salvation Army Community Services Centre

Captain Randy Hale
9912 Macdonald Ave,
Fort McMurray, AB T9H 1S7
Tel (780) 743-4135 Fax (780) 791-2909
sa.start@shawcable.com; randy_hale@can.salvationarmy.org,

Search & Rescue

John Brittle, President
P.O. Box 5053,
Fort McMurray, AB T9H 3G2
Tel (780) 743-0361
danlines@shaw.ca

Self Reliant Individuals (Health & Welfare)

Canadian Mental Health Association

Karen MacMillan, Executive Director
302-10011 Franklin Ave,
Fort McMurray, AB, T9H 2K7
Tel (780)743-1053 Fax (780)743-0959
admin@woodbuffalo.cmha.ab.ca

Canadian Paraplegic Association

Heather Thomas, Regional Services Coordinator
Wood Buffalo Community Village
Fort McMurray, AB
(780) 838-3901
heather.thomas@cpa_ab.org

CNIB

Bonnie Beattie, Asst. Director of Services
12010 Jasper Avenue
Edmonton, AB T5K 0P3
Tel (780) 488-4871 Fax (780)482-0017
bonnie.beattie@cnib.ca

Wood Buffalo HIV & AIDS Society

Daven Seebarran, Executive Director
204-10011 Franklin Avenue
Fort McMurray, AB, T9H 2K7
wbhas@telus.net

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 neighbour cope with a 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 the United Way funds that provide essential services to one in three local residents. Why penalize all of them because of one agency? You may also take advantage of the Donor Choice option on your pledge card to designate your donation.

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. (If you donated to the 2009 campaign, your pledge is deducted from your pay in 2010, therefore the donation is recorded on your 2010 T4.) If you give by cash, cheque or credit card, your tax receipt will be mailed to your home address by February 28 of the following year. Please ensure you complete the home address section of the pledges form if donation by cheque, cash or credit card as Canada Revenue Agency requires that tax receipts be sent to home addresses.

When will the agency I have designated receive my donation?

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

I live outside of Fort McMurray. Where will my donation go?

You can designate your donation to any community United Way or a specific registered charity (member or non-member agency) by indicating your choice on your pledge card.

4 Steps to Successful Canvassing

The most effective method of fundraising is face-to-face or one-on-one canvassing. There are four basic steps to successful canvassing.

STEP 1: PREPARE

STEP 2: ASK FOR THE GIFT

STEP 3: THANK YOU

STEP 4: FOLLOW-UP

STEP 1: PREPARE

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

- 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 employees campaign history
- Visit our website at www.fmunitedway.com

There are several other things you can do to help prepare for a more 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 which employees you have already canvassed. If you have forms left they will have the names of those still left to canvass on them.

United Way Member Agencies

Healthy Families & Seniors

(Community Services)

The Children's Centre

Ruby Canning, Executive Director
Bay C, 254 Gregoire Drive
Fort McMurray, AB, T9H 4K6
Tel(780)743-3309 Fax(780)743-1995
ccentre@telusplant.net

The Hub Family Resource Centre

Melissa Fowler, Executive Director
Bay 6, 118 Millennium Drive,
Fort McMurray, AB, T9K 2S8
Tel(780)791-7110 Fax(780)743-8516
mjf@thehubfrc.ca

Golden Years Society

10111 Main Street,
Fort McMurray, AB, T9H 2G6
Tel(780)743-4088 Fax (780)743-5063
Gys.1976@shawbiz.ca

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

155 MacAlpine Crescent
Fort McMurray, AB, T9H 4A5
Tel(780)743-8997 Fax(780)791-3772
spca@fortmcmurrayspca.com

Support Through Housing Team (STHT)

Kathy Flett, Coordinator
213-10010 Franklin Avenue
Fort McMurray, AB, T9H 2K6
Tel (780)748-1239 Fax (780)780-0088
kflett@sthtfortmcmurray.com

Additional Tips and Information:

- All gifts should be accompanied by a pledge form even if not receiving a receipt. This ensures a correct calculation of number of donors.
- Special Event proceeds do not need a pledge form.
- The payroll department of the workplace receives the yellow copy of the pledge form and the white copies are to be forwarded to the United Way.
- Payroll Deduction receipts appear on the employee's T4 All other gifts of \$25 or more will receive a tax receipt.

Always Making the Right Decision:

These funding streams offer opportunities to member and non-member agencies 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.

The United Way's own system and financial operations are reviewed annually by an independent auditing firm, 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 to a specific United Way community or a specific agency.

Donors can choose from the following options:

- The community Fund (offers maximum impact)
- Targeted Impact (Areas of priority need)
- Registered Canadian charities (member & non-member)

All designations are paid over and above any allocation an agency receives. For non-member agencies, a 15% processing fee applies. This covers some of the costs incurred in tracking and processing the donation.

- Consider your own personal reasons for giving and make your donation.
- Schedule brief canvass visits with employees, taking into consideration the best times and days to meet with them. You want to make sure that you will not be interrupting them at an inconvenient time.
- Identify the people on your list who are past donors (if available) and plan to approach them first or start with people with whom you have a good relationship. This will help build confidence and momentum in canvassing. **People give to people and the number one reason people don't give is that they were not asked.** Making the 'ask' personally will increase your success rate.

STEP 2: ASK FOR THE GIFT

Set the tone: Thank your colleague for agreeing to speak to you and for his/her past support (if information 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 all of its member agencies.

Ask for the Gift: Present each person with their personalized pledge form, 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 that you would be glad to give them the time they need to make their decision.

Ask them: If they have any questions and make sure that you respond to them if you don't know the answers right away.

STEP 3: THANK YOU

It is important to thank everyone, even those people who do not donate. Thank people for their time as well as their contribution. Remember, the impression you leave is the one that 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 see if a system has been set up to thank donors and to ensure everyone gets thanked.

STEP 4: FOLLOW-UP & WRAP-UP

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

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

Also, make sure that anyone who had questions that you were unable to answer receives a reply so that they can make their decision regarding their donation.

Once you have established that your canvass has been completed, compile the results and pass them along to your WCC.

If you are acting as the WCC and canvasser you will want to ensure that the achievement is announced to the entire workplace. It can be included as part of the thank you that you send out or you can make it a more formal announcement, perhaps at a staff meeting where you would then have another opportunity to thank everyone for their participation. Some offices have a budget to provide some sort of an appreciation gathering in the staff room for all employees with the announcement.

Canvasser Checklist

- Meet with Workplace Campaign Chair (WCC)
- Attend a canvasser training session
- Read United Way material & visit the website
- Visit some United Way agencies if possible
- Join a United Way "Seeing is Believing" tour
- Identify the employee group to be canvassed
- Prepare personalized pledge forms
- Make your own personal 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 that 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 1 (Personal Information)

Name: Preferably pre-printed with employee name. Otherwise print clearly.

Company Name: Preferably pre-printed, but otherwise please print clearly.

Home Address: Only necessary if receipt is required for cheque or cash gift. Donor must provide home address as per CRA regulations.

Section 2 (Leadership information)

If the donor wishes to remain anonymous ensure they check off the box indicating "do not print name(s) in Leadership Honour Roll." For those who wish to be acknowledged please indicate how name(s) should appear in printed materials.

Section 3 (How to support)

Payroll Deduction: Please enter \$ amount multiplied by number of pay periods and fill in total amount that it adds up to.

Cash: Please enter amount.

Cheque: Please print amount clearly.

Credit Card: Please enter amount and include expiry date. One of the two options can be chosen of a one time gift, or a monthly total amount.

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

Signature: Pledge form must be signed and dated by the donor.

Section 4 (Designating the gift)

Community Fund: The most effective use of donor's gift providing the broadest range of support to 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.)