



**United Way
Newfoundland
and Labrador**

**Employee Campaign
Coordinator Guide 2019**

*An effective guide to help you prepare
for your workplace campaign*

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INSIDE THIS GUIDE

WELCOME TO UNITED WAY.....	3
WHAT IS UNITED WAY?	4
YOUR ROLE.....	7
10 BUILDING BLOCKS TO A SUCCESSFUL WORKPLACE CAMPAIGN	8
SAMPLE WORKPLACE CRITICAL PATH	12
CAMPAIGN COMMITTEE STRUCTURE	13
4 STEPS TO SUCCESSFUL CANVASSING	16
INCREASING PARTICIPATION.....	19
SPECIAL EVENT GUIDELINES.....	20
THE TOP 12 SPECIAL EVENTS.....	23
FREQUENTLY ASKED QUESTIONS	25
RESOURCES/TOOLS TO HELP YOU SUCCEED	29
CANADA REVENUE AGENCY GUIDELINES FOR RECEIPTING.....	30
NOTES.....	31



THANK YOU AND WELCOME TO THE UNITED WAY TEAM

You are making a difference, by simply volunteering your time to help the community. This guide has been put together to help volunteers to 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 are not alone. Contact the United Way office at (709) 753-8288 or info@nl.unitedway.ca if you have any questions or comments.

United Way Mission:

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

Our Values are to:

- Demonstrate trust, integrity, respect, inclusivity, and transparency
 - Energize and inspire volunteerism and volunteer leadership
- Endorse innovation, partnerships, and collective action
 - Provide non-partisan leadership
 - Embrace diversity

Some Common United Way Terms

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

Campaign Committee: the team of people who work with the ECC to plan and implement the campaign.

Canvasser: the “heart” of the campaign. The individual who makes the face-to-face ask of their co-workers to donate to United Way.



This icon is a flag for special tips and insights on how to run a winning campaign!



This icon is a flag for useful information about United Way.



This icon is a flag for information on potential campaign traps you may want to avoid.

WHAT IS UNITED WAY?

The United Way roots in Canada began in 1917 in Toronto and Montreal. Currently, United Way of Canada is made up of nearly 100 local United Ways. These local United Ways, like United Way of Newfoundland and Labrador are independent organizations who build upon the strength of volunteers and voluntary action by engaging the whole community for the benefit of the whole community. Each United Way is governed by an independent local Board of Directors who, with other volunteers and staff, helps to build caring communities and respond to a broad range of human needs on a national scale. United Way provides direct financial support to literally thousands of charities throughout Canada.

United Way of Newfoundland and Labrador was officially established in 2005 as United Way of Avalon. After several years of failed attempts due to lack of support or momentum, success was finally achieved when the Presidents of local Rotary Clubs recognized the value in bringing this organization to the Province. In the initial years, funds from the United Way of Canada (that had accumulated since the early nineties in anticipation for the formation of the provincial organization), in addition to the dollar support from four national corporations, enabled United Way of Avalon to establish itself and maintain operations. A Board of Directors was elected, an office was set up, a full-time coordinator was hired and an application was filed with CRA for Charitable status. Then after great initial success, United Way incorporated in 2009 and became a province-wide organization.

Today, United Way of Newfoundland and Labrador operates with an office of three dedicated staff. Since our first campaign total of \$151,000 from 12 companies in the first year, our organization has distributed over \$6.2 Million Dollars to charities in Newfoundland and Labrador, with over 100 participating workplaces participating. Because of the continued dedication of our volunteers, Campaign Management Team, Marketing Committee, Audit Committee, Community Investment Committee and the continuation of Rotary support evident through our Board of Directors, United Way of Newfoundland and Labrador is proudly serving and making a difference in communities across the province.

Changing Lives & Communities: Community Impact through Community Building

Community Impact

Community Impact is much more than the many individuals we provide for and serve, or how many programs or partners we unite. Community Impact is about changing lives and community conditions. From quick fixes, to real lasting solutions.

Community Building

Community Building embraces and integrates the strengths, assets and capacities of an entire community and focuses them on a common agenda. While understandably more complex, we believe the adage, "It takes a village to raise a child" holds as true today as it ever did. The fact is that children, families and even neighborhoods have a better chance at being successful when they are surrounded by community support.

We start community building by recognizing the assets of individuals, institutions and organizations in our community. Then we seek to build on those assets to make this a better place to live, work and raise our families. We focus our energy, time and resources to make a difference in three specific areas:

From Poverty to Possibility – Focusing on moving people out of poverty by meeting basic human needs through the provision of food, shelter, jobs, etc. and moving them into possibility.

Strong Communities - Improving access and availability of social and health-related support services needed to revitalize and strengthen neighborhoods and overall community engagement.

All that Kids Can Be - Providing youth with access to early literacy and development programs, recreational activities, mentors and other opportunities to discover and develop their talents and interests as they progress through school and into adulthood.

The Community Fund

Since starting in this province, United Way of Newfoundland and Labrador has been supporting people from all walks of life, helping them build better lives. United Way is committed to making our communities and province a better place to live. Through a network of health and social service agencies, United Way helps to provide essential programs and services throughout entire province. Our strong volunteer base (approximately 80 volunteers each year) is able to keep administrative and fundraising costs low – well below the average for Canadian charities.

When you donate to United Way of Newfoundland and Labrador, 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 funding grants that support entire programs or services each year to agencies in our communities throughout Newfoundland and Labrador. United Way's Community Fund ensures a sustainable network of support and helps develop long-term solutions to community problems.

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 agencies that demonstrate strong fiscal management and deliver effective programs. 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.

Community Investment Committee

The Community Investment Committee is a diverse group of individuals who convene annually to determine where to allocate the funds raised during the latest United Way of Newfoundland and Labrador Workplace Campaign. Committee members are recruited based on a balance of skills/knowledge/experience in social service agencies, community needs, financial expertise, business proficiency, volunteer experience and representation of United Way's 3 focus areas of Poverty to Possibility, Strong Communities and All that Kids Can Be.

Committee members review each application individually then collectively as a group when they participate in panel discussions, voicing opinions and making recommendations on each individual application - participating in the Appeals process when necessary. Our review process is an established and proven system that achieves a balance between community needs and agency funding requirements.

Donor Choice Option

In some cases, donors may wish to designate a portion of their contribution to a specific charity. Donors have the option to choose from the following options when making their decision:

- ✓ United Way Community Fund (areas of greatest local need)
- ✓ Any of United Way's 3 Impact Areas
- ✓ Any registered Canadian charity

Accountability

United Way is accountable to you and the community. We are the largest non-government funder of social services in Newfoundland and Labrador.

The Community Investment Committee ensures that your donation is invested where it has maximum impact. Through this process, every agency we fund is reviewed thoroughly by experienced volunteers and professionals. They work together to review submissions and assess the performance and results of the agencies based on established criteria and funding parameters.

United Way of Newfoundland and Labrador's own systems and financial operations are reviewed annually by an independent auditing firm.

YOUR ROLE

Employee Campaign Coordinator (ECC)

An Employee Campaign Coordinator (ECC) is a volunteer in the workplace who is responsible for managing and monitoring their workplace campaign.

Timeframe & Key Responsibilities

- 2-3 months
- Chairing committee and/or canvasser meetings as necessary
- Conducting the annual workplace campaign within an established timeframe
- Attending campaign events through the course of the campaign

Reporting & Relationships

- Supported by United Way campaign team working closely with staff partner

Qualities to Ensure Success

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

Responsibilities

- Recruiting committee members
- Organizing United Way training for committee members and canvassers
- Planning the campaign and monitoring progress
- Analyzing results, identifying potential challenges and working on solutions
- Supplying information, updates and results to United Way office
- Returning completed report envelopes to United Way office
- Attending Annual United Way Kick-Off and Celebration event

Tip



YOU ARE NOT ALONE!

Support is available. Call the United Way office for assistance, suggestions and tools to enhance your campaign and help you succeed!

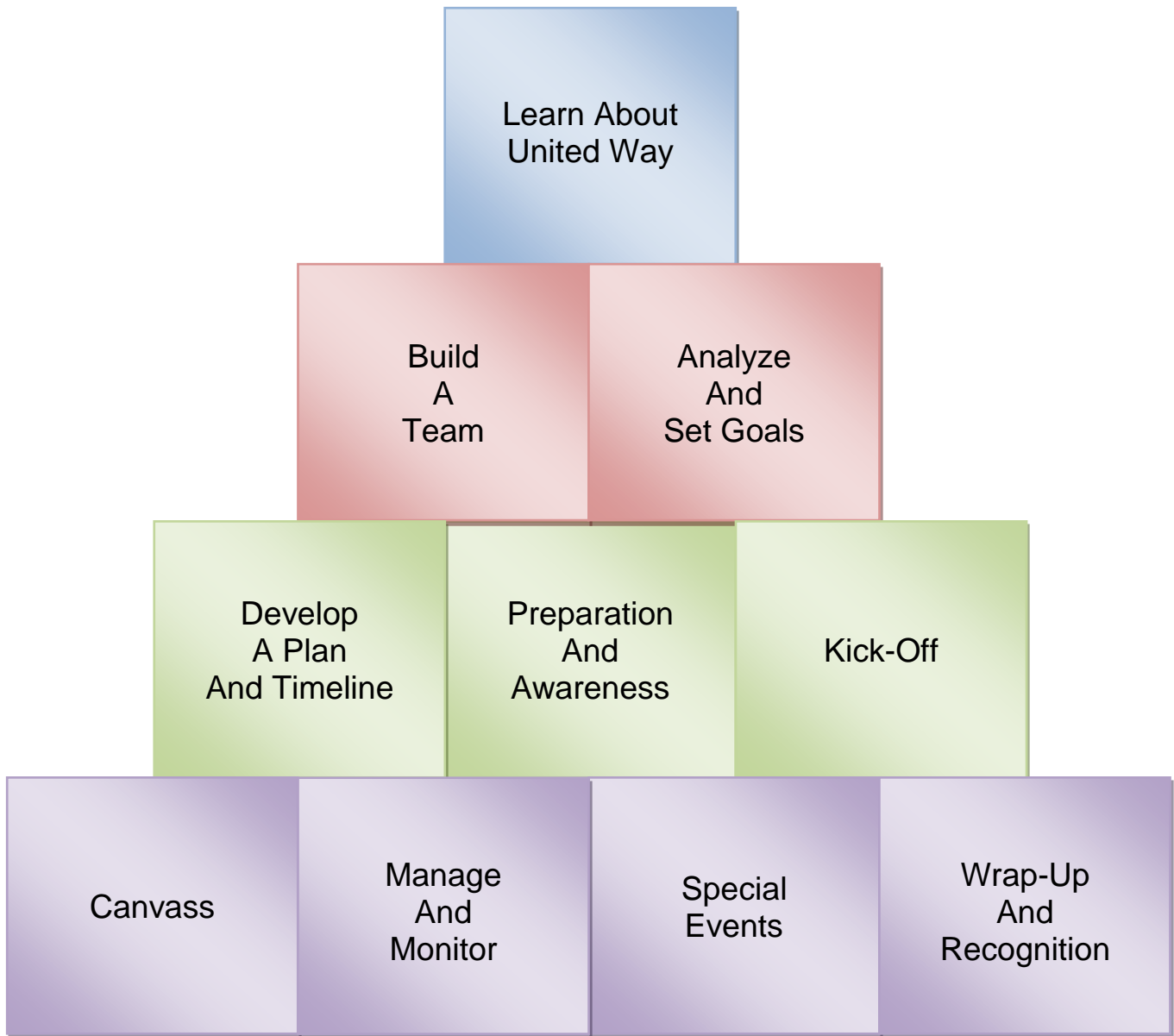
Tel: (709) 753-8288

Fax: (709) 753-8387

Email:

info@nl.unitedway.ca

10 BUILDING BLOCKS TO A SUCCESSFUL WORKPLACE CAMPAIGN



Use these building blocks to create a winning campaign!

10 Campaign Building Blocks

A simple and effective way to organize and run a successful campaign!

1. 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
- ✓ Visit the United Way website at www.nl.unitedway.ca
- ✓ Organize/attend a United Way Training Workshop
- ✓ Ask for an agency that has received funding from the United Way Community Fund to speak to your volunteers/employees about the impact the support has had on their organization

2. 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:
 - Canvass
 - Financial reporting
 - Events
 - Promotion
 - New initiatives

3. 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 complete a SWOT analysis (strengths, weaknesses, opportunities, and threats) for:
 - overall participation rate
 - average gift
 - leadership gifts (gifts of \$1200 or more)
 - special events
- ✓ United Way can help you with a Partnership Analysis which will help the committee develop plans based on analysis and strengths of your workplace
- ✓ Work with the committee to establish goals: financial, participation rate or average gift
- ✓ Develop 3 key priorities for you and your committee

4. Develop a plan and 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

Tip



Visit the United Way website – it's a great source of information!

www.nl.unitedway.ca

Info



Who decides where the money goes?

Volunteers determine the allocation of funds through the

- ✓ Develop a timeline and follow it throughout your campaign to ensure everything that has to be done is done and on time

5. 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, brochures, 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

6. Kick-Off

Mark the start of the campaign – let people know its campaign time!

- ✓ Choose a date to kick-off your campaign and mark the occasion in some way
- ✓ The Kick-Off can be as simple as an email message to all employees, a brief staff meeting with an agency speaker presentation, a barbeque or a pizza party
- ✓ Use your creativity and remember food is a great way to get attention
- ✓ Your Kick-Off is an excellent opportunity to create awareness about United Way and what you have planned for your campaign

7. Canvass

Canvassing is the most critical component of your success

- ✓ Organize a training and orientation session for all canvassers – even those who've done it for years
- ✓ Training will help volunteers 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 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 overall several weeks, 2-3 weeks is recommended depending on the size of your workplace

8. Manage and monitor

Establish a system to ensure that all employees are canvassed – the number one reason people do not give is because they were not asked!

- ✓ Have a committee member responsible for monitoring the progress of your campaign

Important!



Protect your Canvassing!

Events are great for morale and awareness and should be timed so as not to interfere with your canvassing.

Tip



Some ideas for Kick-Off events:

- ✓ Develop a system for team leaders to stay in contact with canvassers and be available to troubleshoot or answer questions
- ✓ Provide ongoing communication of results to both the campaign team and employees

9. Special events

Special events are a great way to boost morale and have fun. Just make sure they do not 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

10. Wrap-up and 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 the success of the campaign
- ✓ Thank the campaign committee and canvassers and don't forget to thank all employees
- ✓ Build your wrap up and recognition event into your campaign plan

Info



Sometimes one of the most effective recognition tools can be as simple as publishing what has been raised!

Important!



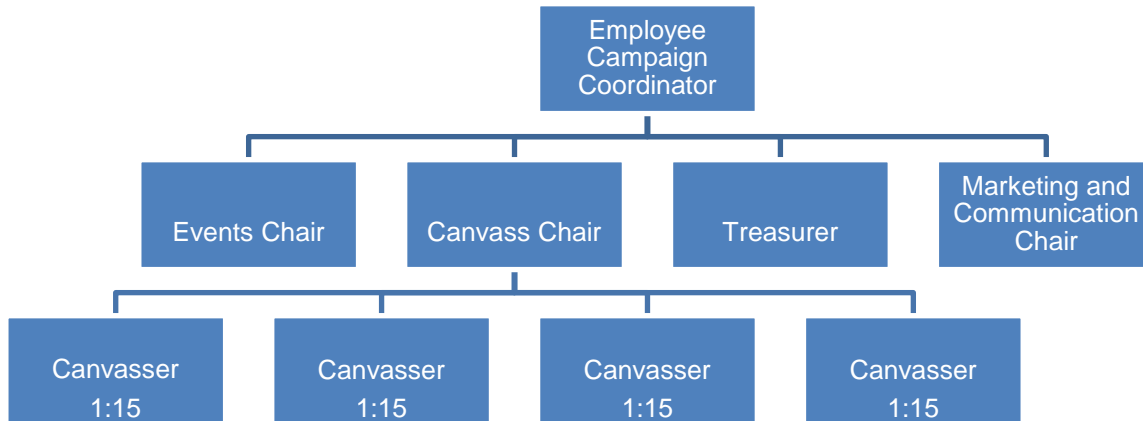
Do not forget to thank **ALL** volunteers. Think of creative ways to say “thanks” – make it fun!!
 - e-mail

SAMPLE WORKPLACE CRITICAL PATH

BLOCK #	ACTIVITY	STEPS	DATE COMPLETED
1	Learn About United Way	Training with staff partner	
		Review materials and training guide	
		Agency tours	
2	Build A Team	Identify committee structure	
		Committee recruitment	
		Committee meeting/training	
3	Analyze And Set Goals	Review history/analyze data	
		Set goals	
		Partnership analysis	
4	Develop A Plan And Timeline	Set dates for Kick-Off and Close-out	
		Choose special events/set dates	
		Recruit canvassers	
5	Preparation And Awareness	Personalize pledge forms	
		Endorsements from CEO/unions	
		Package materials	
		Arrange for agency speakers	
		Canvasser training	
6	Kick-Off	Barbeque/event/dress-down	
		Agency Speaker?	
		Promotion of Kick-Off	
7	Canvass	Canvassing by shift/department	
		Retiree canvass	
		Leadership canvass	
		New hire packages to HR	
8	Manage and Monitor	Develop a system to collect envelopes	
		Track canvass	
		Follow-up with canvassers	
9	Special Events	1	
		2	
		3	
10	Wrap-Up And Recognition	Thank committee	
		Thank canvassers	
		Announce results – thank donors	
		Close-out	
		Appreciation	

CAMPAIGN COMMITTEE STRUCTURE

The campaign committee is the key to the success of your workplace campaign and fundraising for the community. The ECC and committee members work closely with the United Way staff partner to ensure that the workplace campaign runs effectively and within the established timelines. (NOTE: This is a generic structure system – we recognize that this may not fit into all workplaces, and is merely a guide for information purposes)



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

- One individual who is designated as the liaison between United Way and the workplace
- Representation on the committee from different areas of the workplace including all sites, departments, job categories and union representation if applicable
- Optimum canvasser/employee ratio is 10 or 15 employees to be canvassed for each canvasser

Committee Roles, Responsibilities and Guidelines

Position	Role	Responsibilities	Timelines
Employee Campaign Coordinator	<i>The ECC is recruited by the CEO of the organization and is the primary liaison with United Way. This individual is responsible for ensuring that the United Way workplace campaign is managed and resourced effectively, with established plans, timelines and updates.</i>	Plan & timelines confirmed	April/May
		Committee recruited	May
		Organize training/orientation of committee	May/June
		Setting realistic but, challenging goals – financial as well as participation	May/June
		Monitoring all aspects of campaign	Ongoing
Committee			
Events Chair	<i>The Events Chair is recruited by the ECC and is responsible for all events organized during the United Way campaign. Some of these events are fundraisers while others may be awareness events. The Events Chair will ensure that events do not impact the workplace canvass.</i>	Identify events for this year	May
		Ensure events are timed to protect canvass	May
		Logistics for events	May
		Liaise with United Way regarding license requirements, materials, etc.	June
		Recruitment of volunteers for events	June
Marketing Chair	<i>The Marketing Chair is responsible for communications and information pertaining to the United Way workplace campaign.</i>	Marketing plan, developed in consultation with ECC and United Way staff	May
		Coordination of materials, newsletters, displays, posters, banners, etc.	July
		Coordinate agency speakers	August
		Kick-Off workplace campaign and wrap-up	September-November
		Communicate final results to workplace employees	November
Canvass Chair	<i>The Canvass Chair is a key position on the committee and is responsible for canvassing, which makes up most of the United Way fundraising. The Chair will recruit canvassers.</i>	Recruit canvassers	July
		Identify and breakdown lists by department for canvassers	August
		Work with United Way to organize training/orientation	August
		Ensure timelines are communicated	August
		All materials from United Way (pledge forms, brochures, banners, etc.)	August
		Distribute materials to canvassers	September
		Ensure canvass is occurring within timelines established by ECC and committee	September-November
		Monitor results and liaise with Treasurer	September-November

Position	Role	Responsibilities	Timelines
Treasurer	<i>The Treasurer is responsible for counting all cash and payroll deduction amounts, monitoring pledge forms and events proceeds and reporting these results to the ECC and/or United Way.</i>	Develop a process for collecting and verifying envelopes	August
		Receive envelopes from Canvass Chair (and/or Canvassers)	September-November
		Track and monitor results	September-November
		Communicate results to ECC and committee	September-November
		Verify envelopes	September-November
		Point person for United Way to verify envelopes	November
		Ensure all cash donations are forwarded to United Way prior to the end of the campaign (to ensure receipting as per CRA rules)	November
Workplace Canvass			
Canvassers	<i>The Canvasser is the "heart" of the campaign. The Canvasser is responsible to ensure that all employees are appropriately asked to donate and that responses are provided for all questions and concerns.</i>	One canvasser for every 10-15 employees	August
		Attend training/orientation session	September
		Obtain materials from Canvass Chair	September
		Make the ask within the timelines and forward pledge forms to Canvass Chair or Treasurer (as defined)	As per plan

4 STEPS TO SUCCESSFUL CANVASSING

The most effective method of fundraising is face-to-face or one-on-one canvassing because “people give to people”. There are four basic steps to successful canvassing:

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

Step 1: Prepare

It is important to learn about 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. You can do that by:

- ✓ Attending a canvasser training session.
- ✓ Review and become familiar with the information in the materials provided to you from United Way.
- ✓ Visit the funded agencies to learn more about their programs and services.
- ✓ Ask any questions you may have about United Way either during your training, by calling the United Way office, or by asking your ECC.
- ✓ Find out about your own employee campaign history (i.e. the goal this year, date of the Kick-Off, any draws or incentives, scheduled special events).

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

- ✓ Prepare personalized pledge forms. This is a very simple way to track which employees you have already canvassed.
- ✓ Consider your own personal reasons for giving and make your donation first. It will be much easier to ask others for money if you have already made your donation.
- ✓ Schedule brief canvass visits with employees taking into consideration the best times and days to meet with them. You want to ensure that you will not interrupt 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 you have a good personal relationship with. This will help build confidence and momentum in canvassing. Also, securing those consistently positive donor gifts early is a good way to jumpstart the campaign.

Tip



Our brochure, Community Fund list and other materials are great sources of information!

Important!



Step 2: Ask for the Gift

People give to people and the number one reason people don't give is because they are not asked. Making the "ask" personally will increase your success rate.

Set the Tone: Thank your colleague for agreeing to speak to you and for his/her past support (if information is available). Explain that the purpose of the visit is to talk about United Way, the workplace campaign and to ask for their support.

State the Case: Explain your personal reasons for supporting United Way and outline some key messages about United Way's impact on the community. Every contribution is important! 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 funded agencies.

Ask for the Gift: Present each person with their personalized pledge form and a United Way brochure and ask them to consider supporting the campaign. Don't forget to explain the benefits of giving through payroll deduction:

- ✓ Their donation is spread over 24,26 or 52 pay periods
- ✓ The donation is recorded on their T4 for ease in preparing income tax forms
- ✓ It's an easy and convenient way to manage your charitable giving

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 get answers back to them if you don't know the answers right away.

Tip



Make your own donation first and then begin your canvass. This essential first step highlights your personal commitment to

Step 3: Say 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 choose to send a thank you note either handwritten, via email or a voicemail. This could be done as a group with a note from the ECC, Committee, and Canvassers after the campaign or you may choose to send your own thank you right away as you canvass people. You may want to include the overall achievement of the campaign as well. People like to know the outcome of something that they have chosen to support.

Step 4: Follow-Up

It is very important to ensure that everyone has been given the 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 along to your ECC. If you are acting as the ECC 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 as outlined in “Step 3” 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, donuts or cake and coffee in the staff room or just a candy or cookie delivery to all employees with the announcement.

Tip



People give through payroll deduction because it's easy. Encourage payroll deduction. Over 70% of employee giving comes from payroll deduction.

Info



Canvasser Checklist

- Meet with Employee Campaign Coordinator
- Attend a training session
- Read the United Way material
- Visit some United Way funded agencies (if possible)
- Identify the employee group to be canvassed
- Prepare personalized pledge forms
- Make a personal donation
- Meet with each employee on the list
- Follow-up with any questions that need answers
- Follow-up with any previously absent employees
- Ensure that all forms are completed correctly and forward to ECC or treasurer
- Thank all employees for their time
- Communicate campaign results to all employees

INCREASING PARTICIPATION

Increasing participation begins at the planning phase of your campaign. Below is a checklist to help you increase participation this year!

- 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.
- Management supports campaign and provides visible support along with adequate time for volunteers.
- A Leadership (donations of \$1,000 or more) Chair has been appointed to canvass leadership donors and senior management.
- A partnership analysis has been scheduled to review previous results and identify areas of opportunity, strengths and challenges. Previous results have been analyzed to determine which areas need to be focused on to attract new donors.
- A participation goal has been set and the number of donors required to achieve this goal has been identified.
- The United Way staff has provided a customized training session for the committee and canvassers.
- 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.
- An awareness plan is in place including group information sessions, agency tours and/or agency speakers.
- Pledge cards have been personalized.
- Payroll deduction is being promoted as the easiest, most convenient way to give. Events are timed to protect the canvassing period.
- 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.
- There is a plan in place to thank all donors, volunteers and employees to ensure high participation in the following year.

SPECIAL EVENT GUIDELINES

Special events can be an important part of your campaign. They help create awareness, motivate employees to participate, promote team spirit and may also raise funds. Special events should be timed to enhance your campaign. Research shows that the payroll deduction canvass is the most effective way to raise funds within workplace campaigns. Employees who have participated in several special events that involve a cost often feel that they have already made their United Way donation and choose not to participate in the payroll deduction canvass. For that reason, we recommend holding any “fundraising” special events after the canvass but, encourage “FUN-raising” events to kick-off or boost your campaign. In either case, there are several ways to ensure successful special events:

- ✓ Recruit a special events chairperson to be a part of your campaign committee. Special events need an energetic, creative individual who can allocate enough time.
- ✓ Choose events that have already proven effective either in previous years or at other United Way campaign workplaces.
- ✓ 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, promotional banners, 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 and 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.
- ✓ Give yourself lots of planning time, especially if you will need licenses or permits. Your United Way staff partner can help with applying for those. Please provide 2 weeks for processing.
- ✓ 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!!!

When is a Lottery License Required?

Any time an employee purchases a ticket for something they may or may not win, you will require a lotto license. Examples include:

- Selling tickets for a 50/50 draw
- Selling tickets on a gift basket
- Selling tickets on gift cards and other prizes

If you are selling an item whereby employees pay for something and get something in return, you do not require a lotto license. Examples include:

- Items that are ordered in advance such as parfaits, subs, cold plates, and other foods
- Bake Sale
- Selling guesses at the number of jellybeans in a jar

If you're unsure, you can always contact United Way to confirm.

If you are selling tickets for a prize valued at less than \$500 **AND** tickets will only be sold on the day of the event, you can use roll tickets – otherwise, you will require professionally printed tickets.

Any time you require a lottery license, your partners at United Way require 2 weeks to process a license. Because we are run by a volunteer board of executives, we require their signatures and approval of all licenses processed. Due to their availability, it can sometimes be a challenge to get signatures, so we ask to have as much time as possible to acquire the signatures as well as have the document processed through Service NL.

Lotto License Info Required

Location of the Draw → ie: United Way Newfoundland and Labrador

Address of the Draw → ie: 39 Pippy Place

Date of the Draw → ie: November 10th, 2019

Number of Tickets to be sold → ie: 500

What price the tickets are being sold for → ie: \$5.00

Prizes & the approximate value → for gifts, request the approximate retail value because you will have to provide the total value of all prizes

Over and above everything else, don't forget to invite your United Way partners along to your special events. Our presence at a special event offers a casual way for employees to ask questions about the campaign. It also allows us to get photos of your workplace having fun while raising money. These photos are ideal to share on our social media. Not only are they great promotional tools for United Way, they also allow us the opportunity to promote the commitment of your workplace to such a great cause.

A FEW SPECIAL EVENT IDEAS (See our Special Event Guide for Additional Ideas)

- 1. Casual Day:** Sell “I’m dressed this way for United Way” stickers (available from your United Way office or can be ordered from the United Way of Canada website) allowing employees purchasing them to dress casually on certain days (usually Friday’s). Employees purchase stickers for \$2 - \$5 each. As well, designate certain casual days as “Crazy Days” and encourage your employees to show their wild side clothing.
- 2. Balloon Pop:** Employees donate prizes for this event, which is a variation of a traditional raffle. Before filling a balloon with helium, put a note inside with the name of a prize. Employees pay \$1 to buy a balloon and pop it to find their prize.
- 3. Employee Raffle:** Ask employees to contribute something special for a raffle prize (i.e. homemade pies, lunch with a co-worker, weekend stay at a vacation cabin or condo, prizes donated by vendors). A great way to increase participation in your campaign is to offer an incentive to those employees turning in pledge forms early receive three raffle tickets. Employees turning in pledge forms after the “early” date but, before the campaign’s final event, receive one raffle ticket.
- 4. Executive Fantasy Auction:** Executives at your organization create “fantasy” packages (i.e. cooking the winning bidder a special dinner, mowing the winner’s lawn, changing the winner’s car oil, baby-sitting the winner’s children, washing the winner’s car, washing the winner’s windows) which employees can bid on at a special auction.
- 5. Barbeque:** Advertise well in advance what you will be serving at the barbeque. Have your tickets on sale a week ahead of time so you will have an idea of how many steak/hamburgers/hot dogs you’ll need. Encourage top executives to cook. Provide chefs with a United Way apron (available from your United Way office or can be ordered from the United Way of Canada website).
- 6. Vacation Day:** Make a vacation day the prize for a participation special event. Every employee who has their completed form in by the early-bird date gets their name in a draw to win a day off.
- 7. Halloween Pumpkin Carving Contest:** Plan a Halloween theme and hold a pumpkin carving contest. Find a local business willing to donate pumpkins for your organization to sell to your employees. Employees buy pumpkins for their families to use in the contest. Charge \$5 to enter and \$1 per vote. Award prizes for various categories: best traditional, most creative, best effort by group, best effort by an individual. Throw a party to end your campaign.
- 8. Garage Sale:** Send an email to all employees asking them to donate some of their gently used articles. Then set up a booth during your campaign and give co-workers the chance to purchase these items. After all, one person’s junk is another’s treasure. An interesting twist: organizers could create stories about each item before auctioning them off (i.e. an old Hawaiian shirt was once owned by Elvis). The little stories will help make it more fun and profitable.
- 9. Paper Airplane Contest:** Have a paper airplane contest from an upper floor of your building. Charge \$1-\$2 per paper airplane (sheets of paper with folding design and space

for name already printed on it). Prizes awarded for longest and straightest flight or place prizes on the floor and plane closest to the prize wins.

- 10. Get Out of Jail For a Fee:** Give employees the opportunity to send other staff members to “jail” during their lunch hour or coffee break (or both). Have someone on the campaign team act as a warrant officer. The person having someone arrested will go to the warrant officer and purchase a warrant for the arrest of a co-worker at a cost of \$2. The warrant officer then advises the prisoner-to-be that there is a warrant for their arrest. The individual may then pay bail to avoid jail time (\$2). If three people purchase a warrant for the same person, the prisoner will have to pay bail three times to stay out of jail (\$6 in this case).
- 11. Kiss the Pig:** Get your CEO and top management to participate in this fundraiser. Place a picture of each on a container. Employees will determine who will kiss the pig by placing \$2 in the container of their choice. Employees can vote as often as they want. The amount in each container is counted and the one with the most gets to pucker up for the pig.

FREQUENTLY ASKED QUESTIONS

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

A. United Way is the most efficient way for donors to make the greatest impact in their local community. United Way identifies needs 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 meet new and emerging needs in the social services field.

Q. How much of my donation does United Way spend on administration costs?

A. United Way's administration costs are 10 percent thanks to community partnerships and hundreds of volunteers. By working with many volunteers, partnering with many workplaces, and securing sponsorship and gifts-in-kind, United Way of Newfoundland and Labrador keeps costs down and maximizes every dollar you give.

Employees generally make their pledge in the fall; however, some employees leave the workplace during the year for various reasons. To cover this loss United Way holds 5 percent of each donor designation until all pledges have been paid. This ensures that the intended charity still receives their intended gift.

Q. My spouse gives at work. Why should I give?

A. Charitable giving is a very personal choice. However, we like to remind people that donating regardless of how big or small can make a large impact when combined with that of other donors. Through payroll deduction, one smaller gift, added to another, equals a painless way to contribute a larger gift.

Q. Who runs United Way?

A. United Way is directed by a volunteer Board of Directors with the assistance of a small staff. In addition to the Board, there are many other volunteers just like you.

Q. Why should I give to United Way? I never use any of the agency services. Someone else will give, I don't have to.

A. You are someone else's someone else. Check the list of agencies supported by United Way of Newfoundland and Labrador. Chances are, you will recognize an agency a close friend or family member has already used. Please don't leave to others what you believe is worth doing. By giving, you will become an inspiration to those around you to give as well.

Your support helps the community in which you live, work, raise your families, and perhaps will retire. Unexpected crisis or changed circumstances can strike anyone at anytime. It may not be you, but it could be someone you know or care about. Your donation ensures that help will be there when it is needed.

Q. Can donors direct which agency they want their funds to go to?

A. Most individuals entrust their gift to the United Way Community Fund, allowing experienced community volunteers and staff to determine where their donations will have the greatest impact. However, donors may direct any portion of their gift to any registered Canadian charity.

Q. What is Donor Choice?

A. We respect the right of our donors to support what is important to them. Through our donor choice program you can choose where your money will be invested in the community.

Donors have the ability to support United Way in a variety of ways. You can contribute in three different ways, **or in any combination of the three:**

1. **Community Fund:** your donation will be used to support a wide range of programs in our community. Experienced volunteers and professional staff determine where the funds will have the greatest impact.
2. **Impact Areas:** If you have a particular interest in a specific issue you may direct your donation to the corresponding Impact Area. Programs and services with outcomes linked to that area will receive funding under that Impact Area.
3. **Donor Designation:** You may direct a portion of your gift to any registered Canadian charity.

Q. Who will receive United Way funding?

A. Any registered non-profit organization providing health or social services in Newfoundland and Labrador may apply for funding. To receive funding, an agency must meet the rigorous management and performance criteria which are part of the application process established by United Way volunteers and must also address United Way's mission and values.

Q. How is the amount of money given to each agency decided?

A. A group of volunteers (Community Investment Committee) invests time to understand each agency, their programs, service client groups and the community environment. After a thorough review of agency financial information and meeting with representatives of each agency, the committee develops recommendations that are forwarded to the Board of Directors of United Way for consideration.

Q. What are the advantages of payroll deduction?

A. Payroll deduction makes it easy to give to United Way. This convenient method allows you to spread the payment of your gift over the entire year. The regular payments are more manageable than lump sum donations to various organizations throughout the year.

Q. What are the tax advantages of charitable giving?

A. Donations to United Way fully qualify for charitable tax credits provided by the federal and provincial governments. The exact amounts are included in the United Way of Newfoundland and Labrador brochure. By participating in payroll deduction, your donation appears on your T4 slip so you don't have to keep track of a tax receipt. More information around tax benefits of charitable giving can be found at the Canada Revenue Agency website: www.cra-arc.gc.ca

Q. What are the Impact Areas designated by the United Way of Newfoundland and Labrador?

A. United Way of Newfoundland and Labrador has designated three specific Impact Areas:

From Poverty to Possibility – Focusing on moving people out of poverty by meeting basic human needs through the provision of food, shelter, jobs, etc. and moving them into possibility.

Strong Communities - Improving access and availability of social and health-related support services needed to revitalize and strengthen neighborhoods and overall community engagement.

All that Kids Can Be - Providing youth with access to early literacy and development programs, recreational activities, mentors and other opportunities to discover and develop their talents and interests as they progress through school and into adulthood.

Q. Will United Way of Newfoundland and Labrador trade or sell my name?

A. No, absolutely not. See our privacy policy at www.nl.unitedway.ca for more information.

Q. What is Leadership Giving?

A. The Leadership Giving program allows donors to fulfill their commitment to improving our community, while consolidating their giving and ensuring maximum impact for their charitable contribution. Leaders are donors who contribute more than \$1,000 a year to United Way. A Leadership Gift starts at \$1200, only \$46.15 per pay – based on 26 pay periods. And don't forget the tax benefits of giving! Leadership Givers also receive special recognition from United Way of Newfoundland and Labrador.

Q. How much should I donate to United Way?

A. The amount you donate to United Way is an individual choice and should be a decision made by yourself or with your family. We cannot tell you what to donate because every individual's life-situation is different, and therefore what is allocated towards yearly charitable contributions varies from person to person. No gift is too small, so if you're thinking \$1 a week won't make a difference, please reconsider.

Q. How do I get a receipt for my gift?

A. If you donate through payroll deduction, your donation will appear on your T4 slip. If you contribute by cash, cheque or credit card, you will receive a receipt from United Way of Newfoundland and Labrador for donations of \$10 or more.

Q. How much of my donation stays within the community?

A. All of the money raised by United Way of Newfoundland and Labrador stays in the province unless otherwise designated by the donor.

Q. Why should I have a Kick-Off?

A. Hosting a kick-off each year is a great opportunity to excite employees about the upcoming campaign. Bringing a representative along from United Way who is able to report back on where the funds went from the previous campaign, as well as an impact speaker from one of the funded agencies is a great reminder to employees as to why they're giving in the first place.

Q. Are you on Social Media?

A. Yes! Check us out on Facebook at www.Facebook.com/UnitedWayNL and on Twitter @UnitedWayNL. We encourage all ECCs and Canvassers to follow us on social media and to encourage their employees to do so as well. We are very active on social media sharing our latest information and photos from various workplace special events, Day of Caring© events and community connections.

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.

Training/Orientation Session: United Way staff brings with them skills and expertise to help you and your campaign exceed goals. They will share proven strategies and offer tips, best practices and easy to use ideas to help you succeed.

Agency Speakers: Volunteers, clients and staff of agencies who will share their personal stories to help your employees appreciate how important their support is.

Presentation Materials: Videos and PowerPoint presentations are available upon request. Banners and signage are available on loan from the United Way office.

Print Materials: pledge cards, brochures, Community Fund recipient agency lists, posters and newsletters are available to help you promote the value of United Way.

Training Guides: training guides offer you ideas and best practices, including tips and strategies that will help you grow your campaign.

Recognition: Canvasser certificates, pins, etc. are available through your staff partner upon request.

Frequently Asked Questions: United Way staff are a great source of information about United Way, health and social services in Newfoundland and Labrador and fundraising.

Tip



Check out the United Way newsletter for some great information. To sign up for the newsletter email newsletter@nl.unitedway.ca

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 donations – a receipt is prepared by United Way for donations that are \$10 or more.
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.

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.
3. Contributions of service – 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 goods/services from a charity. For example, United Way cannot provide a receipt for the purchase of campaign t-shirts.
5. Donation of inventory – the rationale is that the business already has tax-deductible expenses 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 received a benefit or advantage.

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