



United Way
Perth-Huron

Campaign Champion Guide

Campaign Champion role

As one of our United Way Champions you are central to the success of the campaign in your organization and ultimately, to the well-being of your community. No individual, company or agency alone can achieve as much as we can working together. Thank you!

As a Champion, your role is to:

- Help employees understand how a contribution to United Way directly impacts residents in Perth & Huron
- Give all employees an opportunity to invest in their community by asking them if they want to donate

Benefits to you:

- ① Opportunity to learn and develop leadership skills. Lead a project from start to finish.
- ② Further your understanding of United Way's role and impact in the community.
- ③ Get to know your colleagues and network with other Campaign Champions.
- ④ Contribute to a great cause and make a difference in the lives of people in your community.

Running your campaign

0 Prior to Week One: Prepare

- Set campaign dates
- Set financial and non-financial goals and communicate them to stakeholders (Campaign Committee, management etc.) e.g. Goal: 85% participation, or \$3000 total
- Assemble and post materials for a visible campaign
- Make *your* gift — making it easier to ask others to give

1 Week One: Launch

- Implement a Kick-off — including a presentation by a United Way representative
- Announce your campaign goal
- Distribute pledge forms and canvass employees, meet with each colleague in person to make your ask. Share why *you* support United Way
- Educate employees about United Way using staff meetings, bulletin boards, emails and company events.
- **Tip:** *Saying thank you to donors is important*

2 Week Two: Review and Complete

- Analyze results to date and adjust your plan as required
- Complete canvassing and follow up with employees as necessary. Make sure everyone has an opportunity to participate.

3 After Campaign: Celebrate!

- Announce your achievements and draw for prizes
- Recognize volunteers (verbally, in company newsletter, etc.)
- Submit pledge forms to your payroll department
- Submit your campaign envelope including pledge forms and proceeds to United Way

What to keep in mind



Raise Awareness

A person must feel motivated to give



Canvass

A person will not give if they are not asked



Thank

Thank each colleague for their time and generosity



You are not alone!





Feel free to ask for help, that's what we're here for

Try these↓

- ▶ Analyze the previous campaign and identify strengths, weaknesses, opportunities and threats (**SWOT**) and make decisions on how you can make improvements
- ▶ Establish a solid **Campaign Committee**: camaraderie and new ideas can be helpful
- ▶ **Personalize pledge forms**: pre-fill names on the forms to reduce donor barriers
- ▶ **Aim for 100% return of pledge forms** whether they are complete or not
- ▶ **Set a due date for pledge forms**
We suggest a two-week campaign but a larger workforce could mean you need more time.
- ▶ **Provide incentives for employees to contribute**. Examples of raffles include:
 - Wine basket
 - Day off
 - The best parking spot
 - Restaurant certificate
 - Jean days
- ▶ **Events** create enthusiasm, build momentum and increase awareness.
 - BBQ
 - Baby Picture Match-up
 - Lunch & Learn
 - Chili Cook-off
 - CD/Book Exchange
 - Vacation day raffle
 - Rent-a-Boss
 - Jean days
 - Themed days (80's, Halloween)
 - Office Olympics
 - Mini Golf in the office
 - Pumpkin carving contest
 - Go Blue or Go Bald
 - Pie in the face vote jars

Tip: Events are best scheduled after pledge forms have been distributed.

Plan

	Mon	Tues	Wed	Thurs	Fri
0	Establish a campaign team Set dates	Contact UWPH to arrange a presentation	SWOT analysis Set goals	Personalize pledge forms & assemble supplies	
1	Campaign Kick-Off  Announce Goal Distribution of pledge forms	Canvass	Canvass	Canvass	Canvass
2	Review results to date Follow up with employees who have not returned their forms	Call UWPH to communicate progress and/or request support 519-271-7730 	Canvass	Special Event	Campaign wrap-up 
3	Announce achievements	Fill out front of envelope	Call UWPH for pick up 	<i>A Best Practice campaign is</i> <ul style="list-style-type: none"> • <i>two weeks in length</i> • <i>goal-oriented</i> • <i>completed by mid Dec</i> 	

Campaign Lite

· A CAMPAIGN FOR THE BUSY WORKPLACE ·

Just starting?

Not sure if you have enough time to run a traditional campaign but still want to help?

Ask new employees

Include United Way information and pledge forms as a step in the HR onboarding process.

Tip: Encourage the ongoing giving option to easily renew donations every year.

Host a special event

At the event ask employees to contribute, have pledge forms ready

Have an electronic campaign

Send out an electronic pledge form with an introductory email. Go to perthhuron.unitedway.ca for material

Why do people continue to give?



The campaign is in line with my own values



To make a difference in people's lives



I was personally affected by the cause



100% Local Guarantee

What's raised local stays local. United Way Perth-Huron is a 100% local organization tackling #UNIGNORABLE issues like poverty, homelessness and mental health right here in Perth and Huron.

Resources & tools to help you succeed

Check out the
online tool kit!



perthhuron.unitedway.ca

- > Get Involved
- > Run a Workplace Campaign

You will find:

- **Sample emails**
- **Electronic pledge forms**
- **United Way logos**
- **Campaign posters**
- **Sample mailing letters**
- **Branded videos**
- **Supported Partner directory**
- **Success stories** from people with lived experience



Did you know? ↓

Over 35% of donations come from employee workplace contributions and make a measurable difference in our community. We cannot do it without champions like you! Thank you!

Training

United Way staff brings with them their skills and experiences 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.

Impact speakers

Stories have the power to motivate donor engagement. Upon request, we can invite supported partners to come and share how your workplace donations positively impact program success.

Presentations

United Way representatives will assist you with presentations to key groups during management meetings, staff meetings, etc.

Print Material

Pledge forms, impact reports and posters are available free of charge to help you promote the value of United Way.

Event Promotion

United Way will assist you in promoting your events through our monthly newsletter and social media. Send us your pictures and campaign stories to share.

Cheque Presentations

United Way is happy to attend and share your achievement celebration with the community (e.g. cheque presentation, awards, photos, possible press coverage, etc.) *We have a BIG cheque for photo ops!*

Call United Way

Use United Way staff members as a resource for information regarding the United Way, fundraising and supported partners in Perth and Huron. 519-271-7730 | 877-818-8867



Tip: Connect with the heart

Share stories of lives changed; found at perthhuron.unitedway.ca



Get Connected



@UnitedWayPH

Gifts that are receiptable

- Direct cash, cheque and credit card donations of \$20 or more are automatically issued a tax receipt.
- Direct cash, cheque and credit card donations are receiptable for the tax year in which they are received by United Way.
- Monthly donations will be receipted at the end of the calendar year, others within 4 weeks of UWPH receiving them.
- Employees who donate through Payroll Deduction Plans are typically provided with donation tax receipts on their work T4 forms.

Gifts that are *not* receipted

- Auction items, raffle and sale items
- Gift-in-kind services

How much does your gift really cost?

The Canadian Government offers tax incentives to encourage Canadian citizens to donate to registered charities of their choice, benefitting communities in a way the individual chooses.

Tip: Explain that payroll deductions are pre-tax, which means considerable savings.

Donation	Tax Credit	Cost after Tax
\$5,000	\$1,967. ⁷⁸	\$3,032. ²²
\$1,200	\$441. ⁷⁰	\$758. ³⁰
\$500	\$160. ⁵⁸	\$339. ⁴²
\$365	\$106. ³⁶	\$258. ⁶⁴
\$200	\$40. ¹⁰	\$159. ⁹⁰
\$100	\$20. ⁵⁰	\$79. ⁹⁵

Note: for example purposes only.
Tax rebates will differ depending on income

Targeted asks

Make targeted asks of your peers

The number one reason people *do not* donate is because they have not been asked. Therefore, we know that asking people for a contribution is an important part of the canvassing process. Asking for a specific amount can be helpful in reaching your canvassing goals.

People give to people. *Tip:* Try to do all your asks in-person.

When individuals donate \$1,200 or more they are recognized as a Leader. Encourage existing donors that are giving close to \$1,200 to consider becoming a Leader Donor.

Targeting giving is the **number one** campaign growth strategy. Your best donor is a past donor. Start there!

Name	Giving Level
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One day's pay	7.5 hrs of pay
Everyday Hero (\$1 per day)	\$365
Friends of the Way	\$500-\$999
Leader	> \$1,200

Try this!

Donate one day's pay to United Way

Have your co-workers indicate they want to donate the equivalent of one day of their pay, deducted in installments over one year.



Frequently Asked Questions

Tips when answering questions:

Listen – Make sure you understand your co-worker's concerns.

Try: “I understand why you might feel that way. Have you considered...”

Encourage questions – Let people express themselves. It gives you an opportunity to address their concerns and correct any misconceptions.

Be yourself – You have important information to present. Your job is to educate and create awareness about the work of UWPH.

Don't worry if you don't know the answers – If you are stumped tell them you will get back to them after speaking with your UW representative.



Remember to give people an option to change their minds. Anyone can sign up or stop donations at any time.



Handling potential objections

Sincerity and commitment are the best tools when responding to objections. Often, providing accurate information overcomes misconceptions and plants a seed for future giving.

Will my donation stay in my community?

Yes.

United Way Perth-Huron is a 100% local organization tackling #UNIGNORABLE issues like poverty, homelessness and mental health. We work to realize a brighter future across the communities we serve through research, advocacy, consultation and investment —addressing root causes.

Your generosity powers United Way Perth-Huron's work. When you show your local love by donating or volunteering, you're impacting local lives.

Why would I give through UWPH when I can give directly to an agency?

Agencies doing their own fundraising takes workers away from the front line where they are needed most.

Our partners benefit from the increased awareness United Way brings. United Way has the capacity to communicate on a greater scale with national businesses, as well as partnering with over 300 workplaces locally.

United Way also invests in social research that sheds light on root causes and unique local issues. Our partners can use this data to advocate for their cause.

We also enable collective efforts, along with the sharing of knowledge and resources.

I can't afford it.

Everyone's circumstance is different and only you can determine what is right for you.

- Giving through payroll deduction will spread your donation over a full calendar year making your gift more affordable.
- Your payroll gift will be tracked on your T4 and you will realize a savings on your tax return, making the net cost of your gift much less than you would think.
- Emphasize each and every gift makes a difference and that we hope you can participate at whatever level is most comfortable for you. *Even the smallest gift has impact.*

Try: “I felt the same way when I was first approached. May I explain why I give now?”



How much are fundraising costs?

16%. The Canada Revenue Agency is only concerned if costs pass the 35% mark.

United Way Perth-Huron is accountable to our volunteer Board of Directors who believe in the work of the organization and are comfortable with our cost of fundraising. UWPH is audited annually by outside body editors and report to United Way Canada. For our most recent audited financial statement, please go to: perthhuron.unitedway.ca

As a registered Canadian charity, United Way is obliged to file a T3010 report with CRA annually, detailing all fundraising, administration, executive compensation and other costs. The latest CRA T3010 data can be found at www.cra-arc.gc.ca. *Every dollar donated and spent is accounted for in our independently audited financial statements.*  Canada Revenue Agency

I don't use any of the services funded by United Way. Why would I give?

Unfortunately, there are many individuals in our communities who need help. Consider an abused woman or child, an elderly person or a person with a disability. For many of these individuals, a United Way supported program provides the assistance they need to maintain their well-being and dignity.

Our vision is a better life for everyone. An altruistic and philanthropic attitude helps achieve that vision. Helping others is at the heart of the United Way. Many individuals face challenges beyond their control. United Way asks those who are able to donate to help ensure programs are available for those that need them, when and where they are needed.

I've already made my gift this year to other charities

- Thank you for your commitment to making a difference.
- By supporting United Way, you help ensure social services in your own community are maintained.

I pay taxes. The government should be responsible for looking after these services

- Shifts in government funding mean agencies find it increasingly challenging to deliver critical services.
- Many agencies rely on stable funding from United Way to deliver additional critical services to address new and emerging needs.
- It takes a community to care for a community. United Way mobilizes resources and brings together supported partners, labour, government, business and volunteers to create sustainable change in the lives of Perth and Huron residents.
- Municipalities have budgets too. When their budget dollars are exhausted they turn to organizations such as United Way.

About Executive Director: Ryan Erb

- When travelling across Perth and Huron for meetings, he drives a Chevy Sonic - 100% sponsored by *Stratford Motor Products*.
- United Way Perth-Huron files its annual CRA T3010 report which includes salary ranges for its highest compensated employees.

Why do some organizations conduct their own fundraising even though they receive money from United Way?

UWPH is not the sole funder of any of our supported partners. Unfortunately, demand for services requires many agencies also raise money on their own. The more funding UWPH is able to provide, the less time and resources agencies are required to allocate to fundraising. This results in more time and resources for their main objective – delivery of important social services to local communities.

Learn More ▼

Learn more about our community work and read our annual report: perthhuron.unitedway.ca/about/reports-and-documents

For questions about United Way Perth-Huron and how we benefit the communities of Huron and Perth Counties, please contact ► info@perthhuron.unitedway.ca

Why run a campaign at work?

1

You can help improve lives locally

Improve the quality of life in the community where you, your employees and your customers live, work and raise their families. Align your *Corporate Social Responsibility* goals with the work being done in *your* community.

2

You can engage meaningfully with your employees

Thanks to the diversity of United Way's work, many people can relate to issues the organization addresses. Engage with employees on local issues they care about.

3

You can join a network of important contacts

Be part of a movement with over 300 workplace campaigns, 2,900 donors and 600 volunteers. United Way collaborates to reach a variety of key decision makers, CEOs, government officials and professionals.

4

You can increase employee morale

Companies and employees can campaign together to achieve a common goal, developing a sense of team and job satisfaction.

5

You can recruit and retain great employees

Make your organization a more appealing place for potential and existing employees who want to work at a company that cares about having a positive impact in the community.

6

You can customize your United Way campaign

We will work with you to meet the requirements of your workplace within the time you have to give. Donations can be made easily — through payroll deductions — and we support you all the way.

7

Add to the recognition of your company

Connect your brand with the power of our brand. Engaging with United Way increases your media footprint and your brand's visibility. United Way is active on numerous social media platforms, local news outlets and radio stations.