

United Way of Oakville Canvasser Guide



United Way
of Oakville



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Thank you for volunteering as a canvasser for your company's United Way of Oakville (UWO) Campaign! Every volunteer makes a difference in the community. The number one reason people have not given is because they were never asked. With your help we can encourage more people to become engaged.

What have I signed up for?

Canvassers are ambassadors for your company's UWO campaign. Each canvasser should approach approximately 15 to 20 co-workers, and provide them with the opportunity to make an informed decision about charitable giving, including:

- Explaining UWO, its philosophy and answering questions
- Outlining your company's UWO campaign timeline
- Requesting donations from co-workers
- Providing UWO agency information to those who may need it
- Thanking donors

Successful canvassers:

- Use a personal touch, either face-to-face or by making a friendly phone call
- Participate in canvasser training to discuss roles and responsibilities
- Are willing and reliable volunteers

Two different ways to canvass:

- **One-on-One:** A highly effective method involves recruiting and training canvassers who approach co-workers individually, and ask them to consider contributing to United Way of Oakville.
- **Group Canvass:** Another highly effective method, because the message is consistent and it requires fewer canvassers than one-on-one canvassing. The group canvass will usually accompany the kick-off event. Pledge cards should be distributed and collected during the session. Group canvass meetings include a United Way staff partner, an Agency Speaker or Agency Video and a message from management/union(s).

Three steps to canvassing:

- 1. Prepare**
- 2. Canvass**
- 3. Follow-up/Re-Canvass**

Prepare

What is United Way of Oakville?

UWO funds 60 programs and services accessed by thousands of people through 31 human and social service agencies. In addition to being a major fund provider, UWO offers professional development workshops to staff and volunteers in the non-profit sector.

UWO's funding priorities emphasize both prevention and crisis intervention. These funding priorities provide clear direction to ensure that UWO maximizes each donor dollar and its impact on the Oakville community.

UWO Funding Priorities are:

- **Strengthen families**
Focus on children and youth, new Canadian and family support
- **Support independence and well-being in seniors**
Focus on quality of life for senior and caregivers
- **Support those in crisis**
Focus on addictions, violence, abuse and mental illness
- **Promote self-sufficiency in individuals**
Focus on literacy, hunger relief and mental health

Meaning of United Way Symbol

The United Way logo is also called the helping hand symbol and is used by United Ways around the world. It symbolizes a message and a mission: to increase the organized capacity of people to care for one another.



1. Learn about your own workplace campaign, including:

Questions	Answers
How much money was raised last year?	
What was our participation rate?	
What is this year's goal? (participation rate/dollars raised)	
Do I have a list of people to canvass?	
When should canvassing start?	
When should canvassing wrap-up?	
Is there an Early Bird Draw? When is the deadline?	
Do I have a schedule of events?	
Who should I submit donations to?	

2. Canvass yourself:

- Consider your personal reasons for giving and make your own gift first. You will find it easier to ask others for a donation if you have already made your own.

3. Develop a canvassing plan:

- If possible, identify those people on your list who are past donors and approach them first. If that information is not available, start with people with whom you have a good relationship. This will help you build confidence and momentum in your canvassing.

4. Arrange brief meetings:

- Call ahead to arrange a brief meeting, or send an e-mail to let people know that you will be coming around to canvass them.
- Occasionally, you may approach someone who is reluctant. Tell that person you are making an effort to meet all those on your assigned list for a few minutes. You'd like to thank them for last year's support (if applicable) and talk about United Way.

Sample Script

Dear (*Insert Employee Name*):

I am your United Way Canvasser this year. I will come by your desk tomorrow to personally invite you to contribute to our 2009 Campaign.

Did you know:

- Approximately 30,000 people in Oakville use the services of a United Way funded agency each year? It may be the person sitting next to you.
- The gifts made here at (*Insert your company name*) help feed the hungry, support individuals with developmental disabilities, assist battered women and children, create safe neighbourhoods, and help children improve their academic performance?
- United Way is the most effective and efficient way for you to help people who truly are in need?
- Community volunteers evaluate the funding applications received by community agencies to distribute the money raised by United Way?

- Next to government, United Way is the leader in funding human and social service programs in our community?

This is why I support the United Way.

Please take the time this year to learn more about how United Way of Oakville is making our community a better place to live, and consider joining me and many other employees who pledge a gift. Our 2009 Goal is to raise \$XXX with XX% participation and I am confident we can achieve that goal with your help. I look forward to speaking with you tomorrow and thank you in advance!

Canvass

1. Set the tone:

- Thank your colleague for agreeing to see you and for their past support (if applicable).
- Explain that the purpose of your visit is to talk about UWO, how their donation will make a difference in our community, and ask for a donation.
- Explain that “you” can make a difference; make it personal.

2. State your case:

- Be as honest and open as possible. No one expects you to be a United Way expert, speaking from the heart is far more convincing than reciting a speech.
- Try the following approach: “If you contributed to UWO before, thank you. Let me take a few minutes to tell you how the money impacted the community.”
- Refer to the brochure/agency directory.
- Explain your own personal reasons for supporting United Way.

3. Ask for a donation:

- Give each employee a pledge card and brochure/agency directory.
- Ask every potential donor whether you can count on his or her support this year.
- Let people know that you are hoping for a quick response. This is especially effective when there is an Early Bird Draw.
- If someone is unable to respond, be sure to establish a date for follow-up.

4. Answer questions:

- If you are unable to answer a question, make a note of it and tell your colleague you will get back to them. Contact your Canvasser Coordinator, Employee Campaign Coordinator, or United Way staff partner to obtain a response and return to the donor with the information.
- For questions about how to fill out United Way’s pledge card, ask your Canvasser Coordinator, Employee Campaign Coordinator or United Way staff partner.

Refer to Appendix A: Donation Receipts and Tax Savings for financial information

5. Say “Thank You”:

- It is important to thank everyone – even those who do not donate. Thank people for their time, as well as their contribution.
- Have your Campaign Committee determine a proper thank you, i.e., a thank you card, a balloon, a mint, etc.

Follow-up/Re-canvass

Follow-up

After your initial round of canvassing, be sure to touch base with:

- People who did not confirm their donation.
- Anyone who was out of the office.

Once you have canvassed all of the colleagues on your assigned list, report results and any feedback to your Canvasser Coordinator or Employee Campaign Coordinator.

Re-canvassing and ensuring your success

In some campaigns (or in particular areas/departments) there is occasionally a need to re-canvass people after the initial approach has been made. Your United Way staff partner can help you develop an effective re-canvassing strategy such as:

- Organizing a special group meeting to show the United Way public awareness film for those who have not seen it.
- Distributing a second pledge card with a brochure asking for support.
- Launching a communications campaign (posters, flyers, etc.) which emphasizes the goal and progress to date, urging those who have not yet done so to submit their pledge cards.

Appendix A: Donation Receipts and Tax Savings

Donation Receipts

One-time* donations are receipted by UWO. Payroll deduction donations are receipted on T4 slips.

Receipt of a 2009 Campaign donation:

Type	Paid	Receipted	By Whom	How
One-Time	During Campaign	Post-Campaign	United Way of Oakville	By Mail
Payroll Deduction	Throughout 2010	Early 2011	Employer Payroll Department	T4 Slip

*A one-time donation is any gift that is not being deducted through payroll. Examples of one-time donations include cash, cheques, post-dated cheques, credit cards and Electronic Fund Transfers. Income tax receipts are issued for donations of \$25.00 or more, unless otherwise requested.

Designation Policy

All gifts designated outside of UWO and its funded agencies will be subject to a 10 per cent fee up to a maximum of \$50 per designation as per United Way of Oakville's Designation policy. Gifts directed to other United Ways or to a United Way of Oakville funded agency are not subject to a fee.

Tax Savings

United Way issues tax receipts that will reduce your federal and provincial income tax.

For example:

Your gift of:	Total Tax Savings	Actual Cost To You
\$100	\$21.05	\$78.95
\$200	\$42.10	\$157.90
\$500	\$162.58	\$337.42
\$1,000	\$363.38	\$636.62
\$5,000	\$1,969.78	\$3,030.22

* The tax savings listed above are approximate based on an Ontario annual income of \$40,000 to \$60,000. Tax savings will be greater where taxpayer is subject to Ontario surtax.

Thank you!

Your participation is crucial in achieving the goals we, as a community, have set. Our community is changing. United Way is changing with it and we need you to be part of these changes.

The success of our campaign could not be possible without your dedication and energy.

Thank you for being ‘the **One**’ in your workplace.

