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Because of You,

First and foremost, I want to thank you.

Thank you, for being a champion for the United Way of Thunder Bay in your work place. Because of you, our Employee Campaigns are flourishing and account for approximately 46% of the dollars raised each year and our community has hope for today and for a better tomorrow.

It all starts with you.

Your role as Employee Campaign Coordinator/Chair/Canvasser (ECC) is so important. It's important because you are the shining example that sets the standard for the rest.

By showing your fellow employees the importance of giving through payroll deduction and how very easy it is to do you are the leading the way for a better tomorrow in our community.

I can't thank you enough for stepping up and taking the lead on this initiative in your workplace.

You are making a difference.

I hope you will find this handbook helpful in guiding you step by step, through a great campaign with tools, tips and best practices to ensure your success.

Remember you are not alone. Your United Way Staff is here to help you by keeping you informed about our results, helping you get the materials you need, or answering your questions. We are committed to being your greatest advocates because, quite simply, we couldn't do this important work without you.

On behalf of the many people in our community whose lives are forever changed by your dedication, **thank you.**

Together, we are changing lives.

Sincerely,



Jodie Wilson

Campaign Director

United Way of Thunder Bay

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What is an ECC?

Employee Campaign Coordinators/Chairs/Canvassers (ECC) are an integral part of the United Way Campaign. You are the go-to person, the one who assembles a team, creates a plan and acts as an “ambassador” for United Way.

ECC Role

Your role as an ECC is to engage 100% of your colleagues in the opportunity to participate and give.

In the best campaigns, ECC’s support United Way’s goals to ensure that 100% of your employees are involved, informed, inspired, approached, followed-up with, and thanked.

Some of your responsibilities include:

- Lead and direct the United Way campaign within your organization, motivate your campaign committee and inspire people to give
- Recruiting Canvassers and other volunteers to assist you with your campaign
- Help employees understand how contributions to United Way directly impact our community
- Give all employees an opportunity to invest in their community

Benefits to You

- Opportunity to develop leadership skills.
- Lead a project from start to end.
- Develop fundraising skills.
- Get to know your colleagues while contributing to a great cause.
- Make a difference in your community.

Employee Campaign Top Tips



General Tips

- ✓ Have a definite start and finish campaign date
- ✓ Be organized and think ahead! Use a journal to write down ideas, make notes on fundraising successes and failures, use a spreadsheet to track funds raised
- ✓ Attend the United Way Campaign Breakfast. Get pumped and ready for action!
- ✓ Following the Breakfast, meet with CEO and/or team to plan your goal and fundraising events. Email all staff announcing the year's slogan & goal. Include past successes, benefits of donating, where the dollars will go and fundraising events planned
- ✓ Encourage staff on continuous payroll deductions to increase their donation if possible
- ✓ Create an opportunity for those staff members that do not already donate to do so this year
- ✓ Be confident in your role; feel free to discuss your ideas or issues with your committee members or contacts at the United Way of Thunder Bay

Communications

- ✓ **A personal ask is the most effective!**
- ✓ Talk to donors about the United Way focus areas (All that Kids Can Be, Poverty to Possibility, and Strong Communities) and see which one speaks to them the most. Remind them that the money stays local and helps local people
- ✓ Have a Communications Plan. Keep staff informed and provide updates throughout the campaign
- ✓ Have a great slogan...and use it!
- ✓ Have a plan for approaching new hires and upcoming retirees throughout the year
- ✓ Follow up and speak to individuals to acknowledge their donations. If they have not donated suggest that maybe next year their personal situation might change to allow them to be able to donate, and thank them!
- ✓ Most of all, thank employees for any and all donations no matter the amount. People like to be appreciated!
- ✓ If you don't ask, you won't get... make sure each employee is approached
- ✓ The United Way staff and sponsored employees are available and willing to help you in any way they can, call them
- ✓ **Change your signature in your emails during the campaign to add in the current slogan and ask for a donation**
- ✓ Have a United Way bulletin board where you can post info, invites and more
- ✓ Use videos and promotional materials available from United Way whenever possible

Internal Support & Involvement

- ✓ Ensure your senior management are aware and supportive of your fundraising efforts, ensure they understand the successes and failures, and let them know if you need their assistance in the campaign
- ✓ You are a good leader and a part of the United Way Campaign! Keep your co-workers motivated by showing why this cause is important to you
- ✓ Understand that there will be different personalities within your office regardless of their enthusiasm or lack thereof; try not to let anyone get you down about the efforts you are making for the United Way. The work we do as individuals goes a long way to help others in need and that is what is important!
- ✓ Recruit new committee members who are keen and may have new ideas
- ✓ Try to keep employees interested by coming up with new and exciting fundraising ideas
- ✓ Ask your co-workers to assist your efforts by volunteering to help and participate in pledge drives & events. People will often help even if they can't assist for long.
- ✓ Have small sub committees look after individual events/tasks such as a bake sale or tracking pledges etc.
- ✓ Use the skills & talents of your employees to add flair to your campaign

Fundraising & Information Events

- ✓ Have a well-planned kick-off event - lunches and coffee breaks are good opportunities to host a guest speaker and provide information about United Way. Ensure committee members are available to hand out and help fill the pledge forms
- ✓ Have a United Way speaker come in to talk about the campaign and the funded programs. It will drive home how important it is to support United Way
- ✓ Be positive, energetic and open to new ideas ☺
- ✓ Focus on fundraisers you think will be successful – if you feel good about it, go for it!
- ✓ Let fellow committee members or other employees take the lead on fundraisers when they offer
- ✓ The fundraisers that work best to bring groups together are those that involve food and/or prizes. Try to involve yummy treats, door prizes, etc. at your office events to encourage people to participate!
- ✓ Try to spread out your fundraising efforts throughout the year and/or share the planning and canvassing workload... this will help prevent employees from getting United Way “burn out”

10 Keys to a Successful Employee Campaign

- 1 • Learn about the United Way of Thunder Bay
- 2 • Build your Team
- 3 • Review and Evaluate Past Campaign
- 4 • Develop a Plan and Set Goals
- 5 • Put Your Plan Into Action
- 6 • Make the Ask - Include Everyone
- 7 • Wrap-up and Report Results
- 8 • Recognition & Say Thank You
- 9 • Evaluate
- 10 • Have Fun!

1 Learn About your United Way of Thunder Bay

The United Way of Thunder Bay is leading the way to a better community by improving the quality of life for all local people.

Mission

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

Vision

A community where people help people live with hope, dignity and a sense of belonging.

Values

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

Community Impact

Community Impact is about achieving meaningful, long-term improvements to the quality of life in our community – addressing not just the symptoms of problems, but also getting at the root causes. It is about making fundamental, positive changes to community conditions. We know that the well-being of people cannot be determined by, or assigned to, any one individual, organization, or level of government. The whole community - public and private sectors - must share the responsibility to make Thunder Bay all it can be.

Together, we have developed a strong network of community support to help local people in their times of need.

The United Way of Thunder Bay operates on sound financial practices of transparency, accountability and rigorous assessment – the same principles you rely on when choosing to give. When you donate to the United Way of Thunder Bay, you are making an investment in the future of Thunder Bay. Because of your support, we will be able to continue our mission, to improve lives and build community.

The United Way of Thunder Bay works with local partners to build a strong community and improve the quality of life for all. For over 50 years we have been committed to improving and strengthening our community. Our goal is for Thunder Bay to be measurably better off as a result of the work of the United Way and partners.

United Way's community investments are directed primarily to funding human-service programs, but they also support expanding development of community collaborations and community projects, such as

- ✓ 211
- ✓ RFDA
- ✓ Evergreen A United Neighbourhood
- ✓ Winter Warmth
- ✓ Phone for Families
- ✓ Thunder Bay Counts

The United Way funds local programs and services that support thousands of local residents. These funded programs and services fit within the United Way's three focus areas:

All That Kids Can Be

Goal: To involve children and youth in the community, engage them in learning, and help them to reach emotional and physical well-being.

Programs in this area focus on:

- Supporting struggling children and youth
- Helping youth succeed and stay in school until graduation
- Supporting children and youth to believe in themselves and make healthy choices

An orange callout box with a white border and a white shadow, containing the text "Helping kids be all that they can be".


Helping kids be
all that they can
be

From Poverty, to Possibility

Goal: To reduce the impact of poverty in our community by helping families and individuals find employment, maintain financial independence, and create a better future for themselves and their families.

Programs in this area focus on:

- Providing access to sufficient, safe, affordable, and nutritious food
- Developing human assets like employment skills, education, training, and literacy/numeracy
- Providing access to transitional housing and supports

A blue callout box with a white border and a white shadow, containing the text "Moving people from poverty to possibility".


Moving people
from poverty
to possibility

Healthy People, Strong Communities

Goal: To connect people to the supports they need to achieve personal well-being and safety.

Programs in this area focus on:

- Promoting a sense of belonging and inclusion in our community
- Creating safe homes and neighbourhoods
- Supporting people to achieve positive mental health and providing help to handle life's challenges

A green callout box with a white border and a white shadow, containing the text "Building strong communities".

Building strong
communities

30 Seconds on United Way

The United Way of Thunder Bay is for All People of All Ages, in All Stages of Life.

Everyone wins when kids succeed in school, families are financially stable, and our community is safe and strong.

The United Way of Thunder Bay has three areas of focus which are kids, poverty and community – the building blocks of a good life.

When you make a donation to the United Way, you are funding 59 programs, which provide hope, courage, pride and a sense of belonging for local people.

Together we are changing lives, and that is made possible by you.



2 Build Your Team!

A successful campaign is all about preparation and collaboration. We understand that you go above and beyond your normal job duties to advocate for United Way and your community. To help you out, we've created this timeline to ensure your success!

- ✓ Secure support from Senior Management and ask that they:
- ✓ Authorize Employee Campaign Coordinator/Chair/Canvasser (ECC) / canvassers' time to canvass and attend United Way meetings
- ✓ Establish a budget for kickoff and other events
- ✓ Ask for visible support from company leadership during the campaign.
- ✓ Discuss options for incentives that can be used to encourage participation and increased giving.
- ✓ Attend kickoff & other events

Build a Strong Campaign Team

- ✓ Numbers depend on the size and structure of your organization
- ✓ Representation from each department or location of the workplace
- ✓ Representation from labour if workplace is unionized
- ✓ Choose the right people – interested, motivated, energetic, committed and respected.
- ✓ Invite both new and previously involved committee members to participate.
- ✓ Set a schedule of committee meetings and distribute to members.



What is a Canvasser?

Canvassers are the people who approach co-workers, one-on-one, seeking donations to the United Way. Whether you call them canvassers, reps, team members or campaigners, they are the ones who make United Way campaigns a success. They are the front-line of your campaign, the people who champion the United Way cause and encourage participation in the campaign.

A “canvasser” can be many things.....

- ✓ A “Cheerleader” who generates some fun and excitement around the campaign and communicates good news as it develops
- ✓ A “Trendsetter” who leads by example
- ✓ An “Expert” source of information on United Way and its Funded Agencies
- ✓ An “Enthusiastic Representative” of your campaign committee
- ✓ A person who says “Thank You” to donors for their generous support

3 Review and Evaluate Past Campaign

Analyze past campaign results in order to build on strengths and identify areas of opportunity. Last year's Employee Campaign Chair, United Way staff or Sponsored Employee can help with statistical data.

	This Year	Last Year
Total dollars raised	_____	_____
What was your goal?	_____	_____
Number of Employees	_____	_____
Number of donors	_____	_____
Overall participation rate	_____	_____
Average Per Donor Gift	_____	_____
Was there a kick-off event?	_____	_____
Was there a wrap-up event or announcement?	_____	_____
Were pledge cards personalized?	_____	_____
Were there fewer donors? If so, why? (down-sizing, ineffective canvassing?)	_____	_____
Number of new donors	_____	_____
How were they attained? (new employees, effective canvassing)	_____	_____
Was management/labour involved?	_____	_____
Was payroll encouraged for ease of giving?	_____	_____
Was there one-on-one canvassing?	_____	_____
Special Event dollars	_____	_____
Award received	_____	_____

4 Develop a Plan and Set Goals

- ✓ Invite your United Way Representative/Sponsored Employee to your campaign planning meetings to answer questions and offer ideas. Discuss campaign strategies that fit within the company culture.
- ✓ Determine the means of pledging best suited to your company: annual, continual pledge forms or online pledging. (If you have your own pledge forms or will only be contributing online, please let your Sponsored Employee know.)
- ✓ **ESTABLISH TIMEFRAME FOR THE CAMPAIGN** - Two weeks is great!
Outline campaign activities and determine which team members will be responsible for implementing them, including organizing the campaign kickoff, distributing and collecting pledge forms, special events, securing incentives, etc.
- ✓ **SET GOALS:** It is important for the ECC (& committee) to set goals in order to establish a clear direction and concrete objectives for the campaign. Employee campaigns are recognized on both employee participation and employee contributions.
 - **Participation Goals**
 - Are you working with the same number of employees as the previous year?
 - Can you increase the percentage of employees giving?
 - Can an award or incentive prize be used as a motivator?
 - **Financial Goals**
 - Can you increase the average donor gift?



Develop Key Strategies

- ✓ Decide on a canvass period – 2 weeks is usually great
- ✓ Enlist the support of an appropriate number of canvassers (15 or 20 contacts per canvasser)
- ✓ Canvassers should be familiar with the United Way
- ✓ One on One approach / Peer to Peer approach
- ✓ Offer a presentation in your workplace by a United Way Agency guest speaker
- ✓ Offer incentive draws and prizes for donors if available to you
- ✓ Encourage payroll deduction – it's easy and painless!

Special Events

Special Events can generate fun and enthusiasm, create awareness and raise extra dollars

- ✓ Plan a kickoff event
- ✓ Set a theme
- ✓ Other special events are best done after peak canvassing time

Communications Plan - Keep everyone up-to-date!!

The Annual Report and our website www.uwaytbay.ca contain facts which you can send out in a “Did you know” format

- ✓ Use email messages
- ✓ Posters in the lunchroom or by water machine
- ✓ Use office newsletter or an employee brochure
- ✓ Have letter of endorsement from CEO & Union Leader

To access the United Way of Thunder Bay reports and publications, please click <http://uwaytbay.ca/get-involved/employee-campaigns/employee-campaign-toolkit/>

5 Put Your Plan into Action

Hold the Campaign Kickoff - A “Kickoff” is the best thing to have to engage your fellow employees in the campaign. This simple, fun and informative event signals the start of the campaign.

- ✓ Obtain support from Senior Management.
- ✓ Inspire your colleagues to give with large group kick-off meetings, lunch & learn presentations, etc.
- ✓ Host a United Way presentation for your employee group to create awareness among all staff and demonstrate the impact their gift to United Way has in our community.
- ✓ Utilize United Way brochures, posters and videos. Your United Way staff partner or Sponsored Employee can offer advice on how to keep employees actively engaged in your campaign.
- ✓ Make sure you have the United Way promotional materials, including pledge forms, around the room and available to employees.
- ✓ The kick-off event builds energy and excitement and employees may want to give at that moment. It’s imperative that you have the appropriate forms, pens and information available to make it easy for them to participate.
- ✓ Most of all HAVE FUN!!!! Fun builds energy and excitement!!!

Some ideas that have proven successful:

- ✓ Senior management at each entrance to greet people and hand out free coffee / balloons as people come to work
- ✓ Pancake breakfast or barbeque lunch – senior management do the cooking!!
- ✓ Group meeting with United Way speaker and or video
- ✓ Publicity blitz in your workplace – posters, thermometers and other promotional material
- ✓ Endorsement memo to all employees from the CEO, and/or ECC outlining highlights of campaign and asking for full support
- ✓ Participation prize
- ✓ A mint, a chocolate kiss, a candy attached to a small poem or an inspirational quote



6 Make the Ask – Include Everyone

- ✓ The number one reason people say they didn't give is because they weren't asked!
- ✓ Make sure that everyone is given the opportunity to make a contribution to the campaign.
- ✓ Strive to ASK 100% of your organization's employees and retirees to donate to United Way.
- ✓ Do a one-on-one, peer-to-peer ask with personal follow-up.
- ✓ Use the campaign kickoff, department meetings, and one-on-one conversations to encourage participation.
- ✓ Personally distribute and collect pledge forms. Ask everyone to return their pledge form, even if they choose not to give.
- ✓ Show employees the impact their contributions can make. Giving goes up when people know their gift is making a real difference!



Canvass

Your first steps should be to take a few minutes and Learn about the United Way by reviewing the information in the 2016 Annual Report, and visiting www.uwaytbay.ca.

How to Make an Ask:

- ✓ **Smile**
- ✓ **Lead by Example.** Make your own donation first. Then you're not asking someone to do something you haven't done.
- ✓ **Prepare your own reasons for giving.** For example, you might know someone who received help from a United Way Funded Agency, or you may have visited an agency.
- ✓ **Remember you are not asking for a lot of money.** No gift is too small to help.
- ✓ **Arrange to meet personally** with each prospective donor. Personal asks are most successful.
- ✓ **Build your confidence.** Start with someone you know or donors with established track records of support. Success will give you momentum.
- ✓ **Set your expectations high.** Be prepared to ask for a small increase.
- ✓ Over half of all contributions to the United Way come from employee donations.

Why should you ask for payroll deduction?

- ✓ **It's easier on the donor.** A small amount per pay will not “hurt” or be “missed” and adds up to a significant donation over the year.
- ✓ In other words, **it's a greater commitment** – payroll pledges from employees are typically three times larger than one-time cash donations.
- ✓ Deductions will begin on the first pay of the next calendar year.
- ✓ Contributions appear on employee T4 slips so you don't have to keep receipts until tax time.
- ✓ Employees can spread their charitable donation payments over an extended period up to one year, which gives a cash flow advantage.

There are different ways to canvass. The most effective approach is face to face because “people give to people”. Personal canvassing can be done one-on-one or in a group setting.

- ✓ **One-on-One:** This highly effective method involves recruiting and training canvassers who approach co-workers individually and ask them to contribute to United Way
- ✓ **Group Canvassing:** This is a very effective method because the message is consistent, it requires fewer canvassers than one-on-one canvassing, and can be done in 15-30 minute sessions. This type of canvassing works particularly well in workplaces with numerous employees
- ✓ **Combination Approach:** The combination approach includes a group presentation followed up by a One-on-One approach by canvassers soon after the group presentation

Start with a positive person, and don't get discouraged if you run into a non-giver.

There are three types of people

- ✓ **First** type is the person that will support all worthy causes. They'll even go out of their way to help out, as in walking across the mall to buy a raffle ticket
- ✓ The **second** type will give, if asked
- ✓ The **third** is the person that doesn't believe in any kind of charitable giving
- ✓ Remember that everyone's situation is different. Someone that cannot contribute financially may want to volunteer their time or skills

Give a small incentive

- ✓ Offer something like homemade cookies as an icebreaker or as a gift to eliminate any hard feelings should the person choose not to give (You still work with these people!)

Give each person a pledge form and ask for a donation

- ✓ If someone is unable to respond immediately, establish a date for follow up
- ✓ Avoid the “Desk Drop” if you must leave a form on a donor’s desk without speaking to them; be sure to leave a personal note attached and follow up in person (no emails)
- ✓ Ensure all information has been filled in and signed by the donor

Respect their time & circumstances

- ✓ Make it clear you are asking for an amount that is comfortable for the person
- ✓ **Smile and Say “Thank you”**. Thank everyone, even those who did not give.

If the person has objections

- ✓ Offer to bring their concern to the United Way and have someone reply to them
- ✓ Do not take it personally
- ✓ Relax, be yourself
- ✓ Don’t argue, be sympathetic
- ✓ Try drawing the donor into a conversation about their concerns

7 Wrap-Up & Report Results

Monitor and Report Progress

- ✓ Schedule a mid-campaign update meeting with your committee and your United Way Sponsored Employee. At the mid-point of your campaign, dollars should be at 70% of your campaign goal. This meeting is an opportunity for problem-solving, motivating your team, and thanking them for your efforts to date. It creates action steps to ensure you reach your goal. Send out reminders to encourage people to turn in their pledges.
- ✓ Keep a running total of dollars raised as pledges are collected.
- ✓ Provide regular updates to employees – send out email blasts, update thermometers, etc.
- ✓ Make personal follow-ups with individuals who have not turned in their pledge as the campaign nears the end.
- ✓ Ensure everyone has an opportunity to participate / Re-canvass if necessary (i.e. employees on vacation, return from leaves, etc. who were not part of the initial canvass)

Just as the beginning of your campaign was marked by a kickoff, the end should be signalled by a wrap up and thank you!

- ✓ Ensure all pledges are turned in. Collect payment for those who opted to make a one-time gift with a check or cash.
- ✓ Schedule a meeting with your United Way representative to finalize the campaign – pick up the envelope, extra campaign supplies, etc.
- ✓ Report your final campaign results to employees and leadership.
- ✓ Thank all donors and volunteers who have made the campaign a success.

8 Recognition & Say Thank You

Say “Thank You”

- ✓ It is to recognize and thank donors! Show them the impact of their contribution on the community and encourage them to stay engaged in the work of United Way.
- ✓ Plan a “Thank You” event and invite everyone to attend. Invite your United Way Sponsored Employee to deliver a “Thank You” presentation.
- ✓ Send thank you emails. Ask the CEO for a thank-you message to communicate to employees,
- ✓ Hang “Thank You” posters, give out “Thank You” pins, buttons, and cards.
- ✓ Don’t forget to thank your campaign committee for all their help!

Some ideas for Wrap-up/Recognition and Thanks:

- ✓ Hold a thank you event for employees.
- ✓ Wrap up meeting with presentation of cheque to United Way representative
- ✓ Wrap up reception in lunchroom or boardroom as a celebration
- ✓ Thank you ceremony in staff room – Management participation.
- ✓ Special campaign newsletter to announce results and recognize donors, volunteers, etc. Include photos taken during campaign
- ✓ Thank You Letters (or certificates) from the ECC / CEO & Labour representative (if applicable)

Donor Recognition for Employee Groups

In appreciation of the generous assistance shown by employee groups in Thunder Bay, the United Way recognizes this support with the following awards.



Platinum Award	90% of employees contributing with an average gift of \$130 per donor
Gold Award	75% of employees contributing with an average gift of \$75 per donor
Silver Award	60% of employees contributing with an average of \$60 per donor
Bronze Award	40% of employees contributing a total of \$40 per donor
Merit Award	20% or more increase over last year's contribution, regardless of the percentage of employees who participated or the amount of the gift
Community Fund Recognition	75% or more of an Employee Campaign goes to the United Way Community Fund which supports Funded Agencies & Programs

A complete listing of Corporate Leaders, Leaders of the Way and Employee Awards appears in the United Way Annual Report and at www.uwaytbay.ca.

9 Evaluate

It is important to pause and reflect at the end of your campaign. Invite your team to assist you in this process and schedule the meeting while the campaign is fresh in your mind. A written report identifying campaign activities, results and recommendations isn't mandatory but will be helpful for next year. Keep notes of your efforts to review next campaign.

Your evaluation should include:

- ✓ A review of campaign achievements (dollars, number of donors, average gift)
- ✓ Comparison of achievement to original goals
- ✓ Identification of strengths and weaknesses
- ✓ Recommendations for next year

Remember, you're not alone. If you have a question, United Way is always there to assist you.

Finally, believe in yourself and remember every dollar counts. A new contributor is one contributor more than we had last year.

10 Have Fun!

Employee campaigns create and strengthen team spirit.

- ✓ Engage your employees with creative activities that also educate about the United Way
- ✓ Provide special pledge incentives, such as prizes for certain people such as first time donors, increased giving, etc.
- ✓ Offer your staff coffee and a cookie when you ask. It's hard to say no when you are having a treat
- ✓ Volunteer together – support Day of Caring or other opportunities

Special Event Ideas

Special events are an excellent way to create awareness of your United Way Campaign. They create excitement, get employees involved, and can set the stage for your employee canvass. Increased awareness can have a tremendous effect on your campaign's success.

It is helpful that major fundraising position activities are positioned after the employee canvass so that individuals do not feel that the money they are spending on various events replaces their payroll, cheque, credit card or cash donations.

MAKE SPECIAL EVENTS “SPECIAL”

Events in a Box – www.uwaytbay.ca

Food – People **LOVE** food events - BBQs, pot-lucks, pancake breakfasts, pizza lunches

In-house tuck shop – staff can purchase chips, pop, gum, other snacks with the profits going to the campaign.

Basket Raffles – participants purchase tickets to win assorted baskets

Silent Auctions

Team Challenges – pull together a team and challenge other departments to baseball, tug-of-war, trivial pursuit, basketball, obstacle courses, etc.

Email Bingo – Sell bingo cards and call numbers over your email. First person who gets bingo sends an email message, “Bingo”

Mini-Golf Tournament – Set-up a mini golf course throughout your office. Be creative. Each department can create its own “hole” using common items around the office. Charge “green fees”.

Strengthen Your Leadership Giving

- ✓ Leadership giving is vitally important to the United Way Campaign and a fast way to help you grow your campaign!
- ✓ The United Way Leaders of the Way is a national program, which recognizes and cultivates donations of \$1,200 or more.
- ✓ In 2016, there were 392 Leaders of the Way who donated over \$853,200 to the United Way Campaign.
- ✓ Donations may be made through workplace deduction, cheque, post-dated cheque, credit cards, pre-authorized debit or stock transfers (donor to speak to their financial advisor) and in combination with your spouse (i.e. \$600/each or \$900 & \$400).
- ✓ It is important for United Way staff to know the names of the two donors if this joint Leader gift has been pledged. These gifts represent a significant level of financial commitment to our community.
- ✓ All Leaders of the Way are recognized in the United Way's Annual Report, at a sponsored reception each year and in all Leaders print materials.
- ✓ Identify prospective Leaders who might currently give at levels just below the Leaders of the Way threshold.
- ✓ Make a Leadership Giving "Ask" in every meeting. – it's as simple as a pizza a pay combined with your spouse i.e. \$25/each/pay
- ✓ For more information or any questions, please call Carole Williams, Resource Development & Individual Giving Coordinator, at 626-1756 or email cwilliams@uwaytbay.ca.

LEADERS
OF
THE **WAY**

Donor Designation

A “designation” is a donation in which the donor specifies all, or a portion of, their gift be directed to another registered Canadian charity other than, or in addition to, the United Way Community Fund (minimum designation \$20 to each charity). With one contribution, a person can do all of his/her charitable giving and then deal with only one receipt.

PRIVACY LEGISLATION

During the course of the United Way Campaign you will receive donor information on a regular basis. The United Way has always endeavoured to keep such information confidential and we are committed to comply with the requirements of the Federal Privacy legislation.

- ✓ We therefore ask you to:
- ✓ Ensure the safe keeping of our information while you are utilizing it
- ✓ Destroy all information when you no longer require it
- ✓ Ensure that you have completed the “Conflict of Interest and Confidentiality Policy” agreement with United Way of Thunder Bay if required

For a copy of the United Way Privacy Policy, please visit our website at:

www.uwaytbay.ca

Funding Impact

The United Way Community Fund is made up of all United Way donations not designated, by the donor, to specific registered Canadian charities. Each dollar given to the United Way Community Fund is closely monitored by our Allocations Committee to ensure maximum impact and efficiency of donor gifts.



All Community Fund gifts stay right here in our community to support 59 critically needed human service programs. Our Allocations Process provides you with the accountability, credibility and integrity you rely on when choosing to give.

The United Way of Thunder Bay operates on a basis of sound financial practices. We adhere to a standard for accounting known as TAFR (Transparency & Accountability in Financial Reporting) set by the United Way of Canada. As part of this rigorous assessment and accountability practice, the United Way of Thunder Bay allocates funding to registered charitable organizations based on the advice of an independent Allocations Committee.

Comprised of community volunteers, the Allocations Committee is responsible for the analysis of funding applications, awarding of funding and program follow up. The committee is divided into seven panels of volunteers who meet with applicants' staff, board members and clients before making final decisions as to funding. This team of 40 volunteers spends over 1,000 hours reviewing local agencies' annual funding applications to determine the best investment of donor dollars to address root causes of social issues and improve the lives of people in our community.

The United Way Community Fund and Allocations Process are designed to ensure that your generous gifts are used responsibly and effectively.

Our Allocations Process provides you with the accountability, credibility and integrity you rely on when choosing to give.



Community Fund at Work (Funded Agencies)



The United Way Community Fund provides financial support to 29 local agencies making it possible for them to offer 59 diverse human service programs to members of our community.

Boys and Girls Clubs of Thunder Bay

Child Nutrition Program-Breakfast Club
Community Outreach
Windsor Club
Program Integration
Vale Unit

Canadian Hearing Society

General Support Services (GSS)
Hearing Care Counseling Program (HCCP)
Outreach and Public Education to Communities
Northern Literacy & Lifeskills Program (NLLP)

Canadian Mental Health Association

Education & Training Program

Canadian Red Cross Society of Thunder Bay

Disaster Management
Personal Disaster Assistance (PDA)

Catholic Family Development Centre

First Step & Parent Education
General Counselling & R.I.S.K

Children's Centre Thunder Bay

Public Education and Prevention Services
Rapid Access Model Program

CNIB

Adjustment to Vision Loss
Children & Youth Early Intervention Services
Volunteer Services

Community Arts & Heritage Education Project

Community Connections Programs/Arts in the
Streets

Community Clothing Assistance

Affordable Clothing & Assistance Program
Community Partners Referral Program
Children's Undercover Project
HOW – "Hands-On-Work" Experience
Program

Elizabeth Fry Society of Northwestern Ontario

Volunteer Program - Jail Visitation &
Community Re-integration for Women

Evergreen: A United Neighbourhood

A Strong Neighbourhood Program
Sports N More
Volunteer Coordination

Faye Peterson Transition House

Caring Dads
Pre & Post Natal Education for Abused
Women
Stepping Stones - Substance Use & Violence
Against Women
Supportive Mothering

Hospice Northwest

Hospice Volunteers Thunder Bay

Independent Living Resource Centre
Healthy Choices – Healthy Living Action Group

John Howard Society of Thunder Bay and District
Residential Case Management Program

Lakehead Social Planning Council
211 North Public Inquiry (Walk-ins)
211 North - Public Service Programs

March of Dimes Canada
Assistive Devices Program
Community Services

New Directions Workers Resource Centre
Speaker's School

Northwestern Ontario Women's Centre
Good Food Box Program

Our Kids Count
Big Brother Big Sister Traditional Mentoring Program
Food Nutrition Access Program
Volunteer Program

Regional Food Distribution Association
Opportunity Kitchen

Shkoday Abinojiwak Obimiwedoan
Biwaase'aa In-School, After School & Nutritional Program

St. Andrew Soup Kitchen
Dew Drop Inn Soup Kitchen

St. John Ambulance – Thunder Bay Branch

Camp 911 First Responders
Car Seat Safety and Inspection Program
Medical First Response Unit
Youth Cadet and Crusader

Thunder Bay and Area Victim Services
Victim Crisis Assistance & Referral Services (VCARS)

Thunder Bay Counselling
Community Counselling for Victims of Family Violence
Credit Counselling Program
Psychosocial Family Counselling Program

Thunder Bay Food Bank
Food Bank

Thunder Bay Literacy Group
One on One Literacy/Numeracy Tutoring
Small Group Literacy/Numeracy Classes

Volunteer Thunder Bay!
Connectors (NEXUS – Volunteer Services Program)



Charitable Tax Table form BDO

CHARITABLE TAX CREDITS 2017

Your donations help others... The tax savings help you!

THE FACTS:

Donations to charity reduce taxes (federal and provincial) in the form of a credit against taxes payable.

In Ontario, individuals receive combined federal and provincial tax credits at the rate of approximately 20% to 23% on the first \$200 of donations in a year, and 40.16% to 46.41% for donations in excess of \$200 in a year.

The system rewards extra giving - the more you give, the larger your tax credit and the less income tax you pay.

Here are some examples of the tax saving for a single Ontario taxpayer.

Income Level	Donation Amount (after first \$200)	Tax Savings*	% Tax Savings	What Your Donation Really Cost
Up to \$30,000	\$100	\$40	40.16%	\$60
	\$200	\$80	40.16%	\$120
	\$500	\$201	40.16%	\$299
	\$1,000	\$402	40.16%	\$598
\$30,000 to \$40,000	\$100	\$40	40.16%	\$60
	\$200	\$80	40.16%	\$120
	\$500	\$201	40.16%	\$299
	\$1,000	\$402	40.16%	\$598
\$40,000 to \$70,000	\$100	\$40	40.16%	\$60
	\$200	\$80	40.16%	\$120
	\$500	\$201	40.16%	\$299
	\$1,000	\$402	40.16%	\$598
\$70,000 to \$90,000	\$500	\$212	40.16%	\$288
	\$1,000	\$424	40.16%	\$576
	\$2,500	\$1,060	40.16%	\$1,440
Over \$90,000	\$5,000	\$2,120	40.16%	\$2,880
	\$500	\$232	46.41%	\$268
	\$1,000	\$464	46.41%	\$536
	\$2,500	\$1,160	46.41%	\$1,340
	\$5,000	\$2,270	46.41%	\$2,730

For contributions of \$1,200 or more donors are considered "Leaders of the Way" and will receive special community recognition.

* "First time" donors will receive an additional donation tax credit of 25% of the first \$500 of cash donations given to charities. This will result in additional tax savings of up to \$125. In order to be considered a first time donor, you or your spouse must not have claimed the donation tax credit on your tax return in any of the five preceding tax years.



Campaign Checklist

Before the Campaign

- Meet with your United Way representative or sponsored employee.
- Attend the Employee Campaign Coordinator Training.
- Secure CEO/Senior Management support.
- Recruit a campaign committee to help with the campaign.
- Determine your campaign plan, timeframe, and any incentives.
- Review Campaign history and set your goals.
- Gather your campaign communications and campaign materials from your sponsored employee.
- Schedule your kick-off, United Way speaker and any special events.
- Promote the campaign with an announcement.



During the Campaign

- Distribute pledge forms and campaign materials to every employee.
- Make the ask to every employee
- Promote the campaign, kick-off, and special events through numerous channels.
- Hold a mid-campaign committee meeting to review the progress towards the goal.
- Send regular progress reports to employees.
- Follow-up with individuals who have yet to turn in their pledge form.
- Send reminders about campaign events, incentives, and deadlines.

After the Campaign

- Collect all pledge forms and campaign material.
- Schedule a time with your United Way representative to complete the paperwork.
- Send a thank you letter to everyone including the campaign committee and the CEO or hold a closing event.
- Share photos, successes and the results of your campaign with employees.
- Hold a post campaign committee meeting to evaluate the challenges and successes of the campaign. Keep notes handy for next year.
- Talk to your United Way representative so that we can continue to improve our service.

Year Round

- Keep employees updated on the activities of United Way.
- Promote volunteer opportunities to employees.



United Way
Thunder Bay



uwaytbay.ca



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