

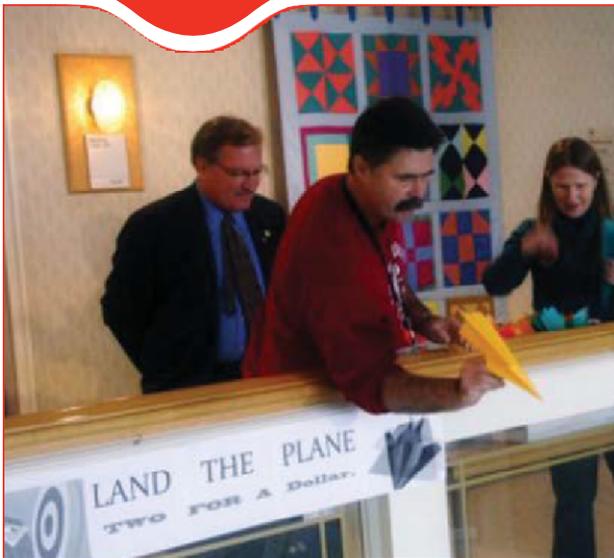


United Way

Prince Edward Island

Campaign Toolkit

Everything you need to run an awesome United Way workplace campaign!



Welcome

This toolkit has been prepared to help you lead a successful workplace campaign. Included in this step-by-step guide is information about the United Way of PEI, campaign tools and helpful resources that other Employee Campaign Chairs have found very effective. Complemented by your leadership and personal commitment, these steps are designed to help you be successful in your role.

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Look for the exclamation mark, which indicates tips or hints



Look for the Internet symbol, which indicates additional information available online at peiunitedway.com



Look for the telephone symbol, which indicates a suggested conversation with your United Way Representative

Why the United Way of PEI?

United Way is more than just a fundraiser. Up until 2003, the United Way of PEI primarily raised and distributed funds to Island agencies whose programs and services worked to improve social conditions.

As our community and its needs grew and became more complex, we recognized a need to develop innovative ways to achieve longer-term results. Today, the United Way of PEI is a community impact organization and a convener for collaborative action aimed at improving lives and building extraordinary communities.

The United Way of PEI is dedicated to creating opportunities for a better life for everyone living on the Island. The United Way inspires people from all walks of life to come together to raise funds, volunteer, and stimulate policy and attitude changes. Together, we are moving people from poverty to possibility, helping kids be all that they can be, and building healthy people and strong communities.

Helping kids be all that they can be

- We help kids be all that they can be by giving them a good start in life so that they are ready to learn by the time they go to school.
- We support children to do well at school by helping them to develop confidence in themselves and in their abilities to do well in life.
- We ensure young people can pursue learning in a safe, non-threatening environment.
- We provide youth with academic and social skills support so that they can graduate from high school and successfully transition into adulthood and post-secondary education.

Moving people from poverty to possibility

- We help people get back on their feet by making sure they have access to the most basic needs in life – food, shelter, meaningful employment and reassurance of their personal value.
- We make sure there are supports in place to help out families who are struggling to make ends meet.
- We work with community leaders and government to make sure there are relevant programs and policies in place that move people from poverty to financial independence.

Building healthy people and strong communities

- We are building strong neighbourhoods.
- We help newcomers access supports and services so they can integrate in our community.
- We provide support to those who have been abused, including women and children.
- We make sure that seniors and those with disabilities get the support they need to live independent lives.
- We help those needing mental health support to access services.

Your role as Employee Campaign Chair

An Employee Campaign Chair (ECC) is appointed by the organization to lead and organize an effective workplace campaign through solicitation of employee support for the United Way of PEI.

There are many benefits that come with the ECC role. You will receive recognition as a leader in your organization, develop project management and team building skills, represent your organization at United Way functions, and know that you are making a personal investment in your community.

Some responsibilities of the ECC include:

- Liaison with your assigned United Way representative throughout your campaign
- Recruiting and managing a strong, dedicated United Way committee and chairing committee meetings
- Scheduling training for committee members and canvassers
- Reviewing and analyzing your organization's past giving performance in order to develop campaign goals and strategies
- Developing the campaign plan and timetable
- Leading, managing and organizing the workplace campaign (kick-off, pledge drive, special events and wrap-up)
- Monitoring campaign results, identifying areas of concern and developing solutions
- Regularly reporting campaign progress to senior management, workplace employees and your United Way Representative
- Planning an appreciation program to recognize and thank volunteers and staff
- Conducting an evaluation on the strengths and weaknesses of the campaign and making recommendations for next year



Don't forget to include your United Way volunteer work on your résumé.

Did you know?

2014/15
FUNDRAISING
COSTS **14%**

THIS INCLUDES A PORTION OF OUR OPERATING COST

Source: 2014/15 audited statements
United Way of PEI

We keep our costs to a minimum... well below Canada Revenue Agency's threshold for non-profit's ratio of costs to revenue. Based on our audited financial statements, our cost of fundraising, which includes a portion of our operating cost, is 14%. The dollars we raise go to support a vital lifeline in addressing the immediate basic life needs of thousands of people living in Prince, Queen's and King's counties, and to addressing the underlying causes of these social issues.

Best practices for a successful campaign

1	Meet with your United Way Representative	Hold a meeting with your United Way Representative well in advance of your campaign to begin discussing the approach to your campaign.
2	Invite Senior Management Support	Invite your Senior Management to be a visible part of your campaign.
3	Discover United Way	Learn first hand about the United Way of PEI in your community.
4	Recruit your Committee	Build a committee of volunteers who represent your entire organization and are committed to success. Include your United Way Representative.
5	Set Goals and Develop Strategies	Set realistic, achievable and challenging goals.
6	Plan Approach	Set campaign dates. Recruit and train Ambassadors to canvass. Plan pledge package distribution and schedule employee presentations.
7	Educate Employees and Promote your Campaign	Plan special events and utilize tools such as your intranet, thermometers and posters to educate employees and boost engagement.
8	Establish Monitoring and Reports	Communicate results regularly with your committee, employees, CEO and United Way Representative.
9	Thank Volunteers and Celebrate Success	Acknowledge committee members, volunteers and donors. Celebrate success with your entire organization.
10	Evaluate Campaign	Wrap-up your campaign by reviewing all activity and related results. Document recommendations to improve next year's campaign.

1. Meet with your United Way Representative

United Way Campaign Staff are available to support you throughout the year as you lead your workplace campaign. They can provide the following support:

Planning

- Assist in the development of your campaign plan
- Provide results and history from previous campaigns in your workplace
- Connect you with campaign volunteers in similar organizations for best practice sharing
- Serve as a committee member
- Lead a training session for your committee and canvassers

Execution

- Arrange for speakers and/or presentation content in your workplace during kick-off or staff meetings
- Attend campaign events
- Help address any questions that arise
- Assist in the collection of funds and appropriate follow-up strategies

Debrief

- Facilitate a session to evaluate campaign successes and brainstorm ideas for future campaigns
- Follow-up with outstanding donors (retirees, maternity/paternity leaves, etc.)
- Collect any remaining pledges that come in after campaign close



Don't know your Campaign Manager or Loaned Representative? Call us at 902-894-8202 and we will connect you with your representative.



United Way Loaned Representatives are employees who are seconded to United Way from their workplace for 16 weeks in the Fall. They work in partnership with Campaign Staff and are trained to provide the same level of support. They are available from September to mid-December.

2. Invite senior management support

The support of senior management in your organization is critical to the success of your campaign. Ask your CEO to assist and support the campaign by:

- Approving the employee time necessary to plan and implement your campaign (this will include time to attend meetings, training, and other campaign activities)
- Authorizing a budget to operate your campaign if it's required
- Supporting campaign goals, strategies and plans
- Attending and/or speaking at campaign events
- Encouraging and supporting the Leadership Giving Program

3. Discover United Way

At the United Way of PEI we believe that community members and organizations will make decisions and take actions that strengthen communities, families, and individuals when they have the opportunity to discover our work. To learn more, visit peiunitedway.com.



Often the only reason why Senior Management does not participate in events is because they were not asked.



Sending a personalized message to each employee endorsing your United Way Campaign.



Ask your United Way representative about Speakers' Bureau, a program that provides United Way workplace campaigns with inspiring and informative speakers who can help share the United Way message.



Visit peiunitedway.com and click on "Island Stories" to view a variety of videos about how your support helps Islanders.

4. Recruit your committee

Review last year's campaign committee, including the structure and how the members felt their time was used. The goal is to have all members involved and contributing, without feeling overworked or underused. Forming a committee with a blend of new and returning members can encourage new ideas, while maintaining continuity. Individuals with the specific skills and expertise that your committee will need should also be approached.

Consider the size and structure of your organization when building your committee. In workplaces with a large employee base, the committee can be comprised of several members, each with specialized roles. For smaller workplaces fewer members may be needed, each assuming multiple roles. Involvement from staff across your organization will ensure that employees from every department feel part of your campaign and help to promote it. Your committee members should be enthusiastic, hardworking and, above all, committed to the success of your campaign.

Planning a United Way campaign should be a positive, rewarding experience. Remember to have fun with your committee!



Once all members of your committee are recruited, contact your United Way Representative to help orient them to United Way.



Other positions to consider are coordinators for:

- New employees
- Young professionals
- Retirees

Make sure that committee members know what is expected of them and have real ownership over their responsibilities. Here are some examples of roles you may wish to include in your committee:

Leadership Giving Campaign Coordinator

- Coordinate Leadership giving campaign
- Recruit Leadership canvassers
- Canvass Leadership donors
- Arrange Leadership presentations
- Thank Leadership donors

Special Event Coordinator

- Plan kick-off & wrap-up
- Coordinate volunteers to organize events that educate employees and build employee engagement

Canvasser Coordinator

- Determine # of canvassers required and recruit one to canvass in each department/location
- Arrange training for canvassers
- Monitor and report progress

Communications / Marketing

- Develop campaign promotion and publicity
- Plan and coordinate year-round United Way communications
- Publicize results regularly

5. Set goals and develop strategies

Analyze your past campaign

Review the results of past campaigns with particular attention to last year's campaign in order to identify campaign strengths and opportunities. Consider these questions:

- Was the CEO / senior management involved?
- Were there committee members representing every part of the organization? Were there a sufficient number of canvassers to canvass?
- Were committee members and canvassers trained by a United Way Representative?
- Was United Way invited to participate as part of your campaign team?
- What was your goal (participation & dollars)? Did you achieve it?
- How were pledge forms distributed?
- Was payroll deduction available?
- Were special events effective in generating fun, awareness and revenue?
- How was the campaign promoted? Did you have an employee presentation?
- What role did the union play (if applicable)?
- Were volunteers and donors thanked?

A review and analysis of these areas can solve campaign challenges and produce recommendations for improvement to your campaign. The United Way can help facilitate this process in an informative and friendly way.

Set your goal

A goal motivates and provides a mechanism for measuring the success of your campaign. Once your analysis is complete, develop your goal. Committee participation in goal setting will increase commitment to campaign success. Your goal should be realistic, achievable and challenging. Once determined, it should be communicated to all employees. Consider setting a percent participation goal as well.



To encourage all employees to take ownership of the campaign goal, post visible thermometers and posters in various locations, including online, and make regular updates.

Recommended start:
**5 weeks before
campaign**



Call your United Way Representative to obtain results and history from previous campaigns in your workplace.

**Suggested campaign
goal formula:**
**Goal = (# of Employees
x Percent Participation)
x (Average Gift Amount)**

Develop your strategies

The strategies employed in your campaign will help you reach your goal.



Contact your United Way Representative to discuss strategies for your campaign.

Sample Strategies

↑ Participation

- ↑ employee participation by offering more opportunities to learn about United Way
- ↑ employee participation by encouraging Everyday Heroes (\$365/yr)
- ↑ employee participation by training all canvassers
- ↑ employee participation by focusing on new hires or young professionals
- ↑ employee participation by canvassing and following up with every employee (including retirees)

↑ Contribution

- ↑ the average contribution by promoting your Leadership Giving Program
- ↑ the average contribution by utilizing personalized invitations to participate
- ↑ the average contribution by promoting payroll deduction



6. Plan your approach

Planning is critical to making your campaign focused and effective. The main areas to consider in your plan are:

Timing

Develop a timeline that is appropriate for your workplace. The most successful campaigns are short, fast-paced and organized. Some of the largest campaigns are completed in one week. The longer a campaign runs, the less excited and enthusiastic the staff will be about the campaign.

Here is a sample timeline for a one-week campaign:

	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY
Execute	<ul style="list-style-type: none"> Kick-off event United Way speaker Distribute pledge forms Leadership canvass 	<ul style="list-style-type: none"> Canvass Early Bird Draw 	<ul style="list-style-type: none"> Canvass Special Event 	<ul style="list-style-type: none"> Re-canvass 	<ul style="list-style-type: none"> Official wrap-up Remit envelopes
Communicate	Promote your campaign	Update group participation challenge Update thermometer	Update group participation challenge Update thermometer	Update group participation challenge Update thermometer	Announce results Recognize donors & volunteers



Educating Employees

Awareness is achieved through ongoing communications and employee presentations. Inviting United Way to present is an excellent resource for motivating employees to take part in your workplace campaign. A United Way presentation can bring your campaign to life through real stories from real people who have overcome adversity or through videos designed to inform and inspire.



Call your United Way Representative to schedule a presentation.

For the educational component of your campaign determine:

- # of presentations needed to accommodate the total staff
- How employees will be notified of presentation dates and times
- Where presentations will be held
- Which speakers are most effective for your audience? We suggest:
 - United Way representative
 - United Way speaker or video
 - A leader in your organization (e.g. CEO, Union President, Department Head)
- How to incorporate additional United Way resources (campaign video, posters, display materials and the website peiunitedway.com)
- Unique educational components such as a Day of Caring or Community Tour, if suitable
- If all communications are timely, informative and interesting

Distributing Pledge Forms

The pledge form is an important tool in your campaign. United Way offers a number of services to assist you, including:

- Pre-printed pledge forms
- Pledge packages including pledge forms, brochures and other resource materials



Contact your United Way representative for further information about pledge forms.

Canvassing Employees

Effective canvassing is the most important element of your campaign.

Canvassers are the frontline volunteers representing United Way. They provide co-workers with an opportunity to make an informed decision about their gift and help to distribute and collect pledge forms.



Suggested ratio for canvassers when canvassing is 1:15

To plan the canvassing component of your campaign:

TRAIN RECRUIT

...a Canvasser Coordinator to build a canvassing team representative of your total workforce, and to facilitate peer-to-peer canvassing.

...Canvassers by booking an orientation session with your United Way Representative.

APPROACH

...employees by choosing a method best suited to your workplace. Ensure all employees, including part-time workers, retirees, contractors and offsite workers, are included and canvassed.

Methods of approach include:

One to One

A canvasser personally connects with a fellow employee. When employees are asked to contribute by a peer, it is more meaningful. Peer canvassing is advisable at every level of the organization and is preferable where employees are spread over a large area and it is difficult to get everyone together.

Group

Pledge forms are distributed following a presentation, an effective and efficient method, ensuring everyone receives the same message. Your canvasser team still has a one-to-one role to play in these situations by encouraging employees to attend all presentations and following up with those who were not present.

Combination

Similar to a group canvass, a presentation is held but pledge forms are not distributed, allowing Canvassers to perform a one-to-one follow-up with each employee. Canvassing should be done immediately following the presentation.

Mail

Pledge forms are distributed by mail. While the personal approach is the most effective method of canvassing, certain work situations (i.e. field workers and retirees) necessitate the use of a mail approach to effectively reach all employees. Experience shows that the most effective mail solicitations are conducted as a separate communication and not included in pay envelopes. Many campaigns incorporate a personal phone call to follow-up on outstanding donations.

Investments made by individuals in the workplace make up over 60% of the dollars raised for our community through United Way each year. Canvassers will have a direct impact on the success of our community campaign. On the next page is a suggested guideline to help Canvassers represent United Way, convey our appreciation, and conduct an effective canvass.



Prepare

BUILD:

Your understanding of United Way and the needs of your community

LEARN:

The strategies / goals for your workplace campaign

SCHEDULE:

Time to meet personally with each colleague

Meet

INSPIRE:

Your colleagues by telling them about your workplace campaign, the goals, opportunities to participate and why you're involved

EDUCATE:

Your colleagues by sharing a compelling fact / story / message that helps explain the value of United Way and the impact on the community

REVIEW:

The pledge package and review the pledge form with your colleagues (if offered in your workplace, promote the convenience of payroll deduction)

RESPOND:

To questions and offer responses (or promise to follow up with a response)

ASK:

Ask for their involvement

PROCESS:

Completed pledge forms or inform your colleagues of the pledge form submission process (i.e. drop box, person collecting, you will return to pick up)

THANK:

Your colleagues for their time and/or their investment

Follow-up

COLLECT:

All outstanding pledge forms, even when employees have chosen not to invest

RETURN:

All pledge forms, cash, and cheques to your point person within a set time frame

FOLLOW-UP:

Follow-up on any questions you were unable to answer after speaking with your United Way Representative

THANK:

Thank your colleagues when they have made their decision



Make your own investment – it's easier to ask others to give when you've already done so.

ASK:

- *Will you help me make our community a better place for everyone?*
- *Will you help United Way change lives and improve our community?*
- _____
- _____
- _____



By collecting all pledge forms, you will ensure that every employee has made an informed decision.



Approach people you know first – this will help to build your confidence.

7. Promote your United Way campaign

Marketing and Communications

Publicity and promotion infuse spirit and help kick off the fun of your United Way campaign. Professionally produced United Way promotional items such as posters, printed materials, progress thermometers, clip sheets and newsletter items are available to help you deliver your message to employees. These items can generate awareness and encourage participation.

Employee Campaign Committees have successfully promoted their campaigns by:

- Using staff newsletters or intranet sites to present campaign highlights, success stories and other results United Way is achieving in our community
- Sending emails to provide campaign progress updates
- Displaying United Way posters and thermometers in highly visible areas
- Showing United Way campaign videos
- Coordinating department challenges
- Using special events to promote the campaign, add excitement and create fun
- Inserting clips from the clip sheet to fill space in newsletters and enhance internal memos or fax cover sheets



Caution! Special events can reduce employee pledges if they are conducted before the pledge drive



Call your United Way Representative for posters, thermometers and other materials to support your campaign.



Visit the United Way of PEI website at peiunitedway.com

Special Event Ideas

- Create your own golf course
- Pancake breakfast
- United Way trivia contest
- Coin war
- Piggy-bank contest
- Auctions – silent or live
- Raffle or 50/50 draw
- Bake sale / craft sale
- Sumo wrestling
- Tournaments
- Office pools
- Casual days

Tax Receipting

Always check to ensure a donation is receiptable under Canada Revenue Agency tax receipting regulations before promising a tax receipt to a donor. This applies to any donation—lottery tickets, goods for an auction, casual day donations, etc. One of the most unpleasant tasks a volunteer can face is telling a donor they will not be receiving a tax receipt after all.

Please remember, these are Canada Revenue Agency tax regulations. United Way must follow them to retain our charitable status. There can be no exceptions.

GIFTS THAT ARE RECEIPTABLE

- Direct cash, cheque and credit card donations of \$25 and over are automatically issued a tax receipt. Donations of less than \$25 will be issued a tax receipt on request.
- Direct cash, cheque and credit card donations are receiptable for the tax year in which they are received.
- Monthly donations will be receipted at the end of the calendar year.

Payroll enquires/receipt requests should be directed to United Way's Finance Manager at (902) 892--1461.

Payroll deductions

Employees who donate through Payroll Deduction Plans are entitled to a tax receipt at the end of the year, reporting total charitable donations for that year.

Sponsorship donations

The pledging/sponsoring of company-run sponsorship events such as bowl-a-thons, dance-a-thons, etc. are receipted under the same guidelines as direct cash and cheque donations. This category does not include corporate event sponsorship. A listing on pledge sheets must include full name, address and postal code, and be legible.

Donations of goods and merchandise by individuals and businesses

Donations of physical goods (not services) for use during an employee campaign may be receiptable. The receipt issued is referred to as a "Gift in Kind" tax receipt and is different from the tax receipt issued for cash donations.

Receipt Requirements:

- Amount must be over \$100.
- Receipt value cannot exceed the proceeds received for the specific donated item, regardless of the fair market value or appraisal value. For example: value of item \$175; proceeds from the item \$150. Receipt would be issued for \$150.
- Items created to initiate donations (e.g., cookbooks) must have any costs incurred deducted from the funds raised before submitting to United Way.

CRA (Canada Revenue Agency) requires that businesses donating items out of inventory or goods they are in the business of selling must supply an invoice to support the value of the donation (at cost). Neither the organization putting on the special event nor United Way will be required to pay the invoice, but the company donating the items is required to include this amount in their sales revenue. For samples of in-kind invoices, contact the United Way's Finance Manager at (902) 892-1461.

Requests for "Gift in Kind" receipts should be submitted with the special event money and supported by the following information:

- Detailed description of the donated item.
- Detailed description of the donated item.
- Fair market value and documentation supporting the amount, i.e., appraisal, catalogue, independent third party, etc.
- Proceeds received for the item donated.
- Date item was donated.
- Name and address of the donor.
- Letter from the ECC stating that the item was used for the benefit of the campaign and the manner in which it was used.

GIFTS THAT ARE NOT RECEIPTABLE

Auctions and raffles

A charity cannot issue tax receipts to people who buy items at a charity auction, even if the price they pay exceeds the fair market value of the item. This is because they are receiving something in return and therefore there is no gift.

Contributions of services

Contributions of services may not be acknowledged by issue of an official receipt. A gift must involve property. Contributions of services (that is time, skills, effort) are not property and do not qualify.

How to use incentive prizes

You can offer an incentive to make a donation only if you ensure that everyone has an equal opportunity to win the prize. For example, as everyone hands in their pledge form (completed or not), they become eligible for a draw. If donors receive any form of material incentive to give, e.g., their name goes into a draw if a completed pledge form is returned, then the donation on the pledge form is not receiptable under Canada Revenue Agency guidelines. This does not apply if the incentive has no market value — for example, a preferred parking space that has no cash value. It is also not permissible to raffle tax receipts.

If you receive donated items for use in your campaign, they may be used in a silent auction or in a raffle. Be sure that you obtain the necessary license if you hold a raffle.

GIFTS THAT ARE PARTIALLY RECEIPTABLE

Admission cost to a meal or entertainment event

Canada Revenue Agency regulations permit the issuing of a receipt for the donation component of the admission price to a meal or entertainment event. For example, if a lunch costs \$30 per person (including HST) and the admission price is \$100, then a receipt can be provided for the \$70 difference. This partial receipting rule applies to dinners, shows or the like.

- Fair market value and documentation supporting the amount, i.e., appraisal, catalogue, independent third party, etc.
- Proceeds received for the item donated.
- Date item was donated.
- Name and address of the donor.
- Letter from the ECC stating that the item was used for the benefit of the campaign and the manner in which it was used.

8. Establish monitoring/reporting

Update your campaign thermometer and report campaign results to all employees regularly. This ensures employees have the latest information, generating more campaign excitement and enthusiasm. Follow-up with individual Ambassadors shortly after the canvassing begins

- Offer assistance if required
- Report your results to your United Way representative and to your CEO or Senior Management
- Conduct a mid-campaign analysis to ensure campaign plans are on track
- Revise your strategies, if necessary, to achieve your goals

Important: Be sure your results are reported to United Way regularly – all dollars should be submitted **by December 15th** of the current year.



Remember that United Way offers experience and facilitation to assist your team in conducting your mid-campaign and post campaign analysis.

9. Thank volunteers and celebrate success

United Way relies on your committee to ensure everyone involved in your campaign is appropriately recognized for their generosity and participation.

Remember to:

- Thank employees for their support of the campaign, including those who have chosen not to donate
- Thank all of your committee members and volunteers
- Thank all United Way donors

There are many ways to recognize the hard work and efforts of your volunteers.

Send them letters and post a thank you notice on your staff bulletin board.

Involving your CEO provides special recognition. Some campaign committees organize a recognition event to celebrate their achievements, which is a nice way to finish off your campaign.



10. Evaluate your campaign

It is important for the campaign committee to analyze and evaluate all aspects of your campaign. The analysis is an important planning tool for future campaigns. United Way offers experience and facilitation to assist your team in conducting your final analysis.

- Review campaign results and compare them to your objectives. These recommendations will be valuable in planning next year's campaign
- Write a report identifying campaign activities and results; it will be appreciated by next year's ECC
- File the report in your organization's United Way Campaign file
- Send a copy to United Way and your CEO or Senior Management



Reach out to your United Way Representative to host a debrief session with your campaign team. We'll take the notes for you!



Campaign materials

The following is a list of promotional materials that will be available for your workplace campaign. Please refer to this list while planning your campaign. Your United Way Representative will help you with your order.

Available at Minimum or No Cost

- Pledge forms
- Posters
- Roll banner
- Thermometer posters
- Balloons
- Videos

Available to Borrow

- Aprons
- Banners
- Flags
- United Way spring-loaded panels
- United Way display

Incentives* to promote pledge card giving

Offer an appealing incentive for making a payroll donation or one time gift. Here are some examples of incentives that you may want to consider:

- Reserved parking spots
- Lunch in the boardroom with CEO
- Company promotional items
- Extra break/shortened work day/ Friday afternoon off
- Free oil change
- Free assistance with personal income tax preparation from your accounting department
- Birthday vacation day
- A travelling trophy that goes to the department with the highest participation
- Dress down day(s)
- Provide certificates for free coffee for a week
- Provide certificates for free meal(s) if an in-house cafeteria is available
- Spring cleaning or housekeeping service coupon
- A “make your own ice cream sundae” party
- Trade your job with the senior manager of your choice for a day
- Everyday Hero: Give a dollar a day for 1 year and be publicly recognized as an everyday hero. Everyone wants to be a hero.
- Hand out pledge cards at the kick-off and encourage return of the pledge card at the end of the event to be entered in to a drawing for a prize. A donation must not be required in order to be eligible for the draw.
- Encourage all staff members to submit their pledge form even if they are not donating to ensure that the organization can get an accurate sense of their participation rate.
- Create visual representation recognizing people who have donated. With their “Angel Initiative”, Citi Cards encourage employees to donate 1 hour of pay per month to receive an additional vacation (known as an “Angel Day”). An angel cut-out with the name of the donor was displayed at the donor’s workstation. The visual recognition encouraged other employees to make a donation.

* Where the donor receives an item, privilege, or other benefit in return for a donation, the value of the benefit may not exceed the lesser of \$75 or 10 per cent of the donation amount. For more information, visit cra-arc.gc.ca.

Glossary of Terms

Canvassers	Canvassers for United Way and the workplace campaign who help colleagues make an informed decision about charitable giving.
Campaign Supplies	Supplies provided by United Way and utilized during a workplace campaign. Examples: donor information brochures, posters, pledge forms, etc.
Canvassing	Canvassers directly solicit employees in support of their United Way workplace campaign.
Day of Caring	“Hands-on” volunteer opportunities that can be organized for your organization to enable your peers to experience the work of United Way funded agencies and Community Partners.
Speakers’ Bureau	Professionals, community impact specialists and people who have been positively impacted by United Way that can be utilized to enhance the educational component of your campaign.
Early Bird Draw	Offer an incentive to encourage employees to complete their pledge form ahead of a deadline.
Employee Campaign Chair	An individual who leads the workplace campaign and possibly a campaign committee.
Everyday Heroes	Individuals who donate \$1 a day, or \$365 per year to support the community.
Kick-off Event	An event that marks the start of the workplace campaign.
Leadership Donors	Individuals who donate \$1,000 or more.
Loaned or Sponsored Representative (LR)	Employees who are seconded to the United Way from sponsoring organizations for 16 weeks during the annual campaign. They are considered staff and provide support to accounts. They are available from September to mid-December.
Pledge Forms	A paper based form, which employees complete for their donation.
Resource Development Manager (RDM)	United Way Employee dedicated to support workplace campaigns throughout PEI and an invaluable resources that can be utilized in the planning, execution and debrief of your Campaign. Please contact the United Way if you have any questions. The RDM is available year round.
Thermometers	A visual tool to track progress towards the campaign goal.
United Way Representative	Campaign staff (see Resource Development Manager or Loaned Representative) assigned to support your workplace campaign.
Workplace Campaign	A defined period of charitable giving within the workplace.



United Way

Prince Edward Island

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