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# CANVASSER GUIDE

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**United Way**  
Winnipeg

# 3 Steps to Successful Campaigning

## One: Prepare

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**Familiarize yourself** with the content of this guide and other campaign materials so that you are comfortable speaking about United Way, and confident in answering your co-workers' questions.

**Make your own pledge first** so that it is easier to ask others to do the same. Consider increasing your annual contribution based on your own personal situation.

**Plan your approach ahead of time** so that you walk into the meeting knowing what you are going to say.

**Start by setting up meetings** with people who already support United Way, and those with whom you have a strong relationship.

## Two: Meet

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**People give to people.** Make sure that you are meeting your co-workers face to face.

**State your case.** You are canvassing to share your passion and explain the impact of contributing to United Way. Invite others to join you.

**Respond to inquiries honestly,** and make sure to follow up if there are any questions where you need to seek out the answers. You'll find answers to some of the most frequently asked questions in the back of this book.

**Make a clear ask.**

- For existing donors, suggest that they increase their gift. For example, an additional \$1 or \$2 each pay period, or movement to the next giving level
- For new donors, explain the different levels of giving found within this guide. For example, becoming a Bronze partner at \$1 per day, or a Friend at \$2 per week

**Arrange for a time to collect** the signed pledge card if the decision is not made immediately in your meeting.

**Say thank you** and show your appreciation to each of your co-workers for their time and their donation.

## Three: Follow Up

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**Arrange a time** to pick up all outstanding pledge cards and provide answers to any questions that you took away from your initial visit.

**Ensure** that each person received an ask. If individuals were away from the office when you were to have met, re-canvassing may be necessary. Ask your Sponsored Executive to help you develop an effective re-canvassing strategy.

**Turn in all pledge forms** to your Employee Campaign Chair, even if there was no contribution made.

*NOTE: United Way understands the need for privacy and adheres to a strict Privacy Policy to protect sensitive information. As a member of the campaign team, please ensure all information provided by a donor is kept confidential.*

## People Give to People

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**The #1 reason that people do not give is that they were not asked. Make sure that everyone has the chance to help create opportunities for a better life for everyone.**

# Frequently Asked Questions

Most people are already familiar with the work of United Way and we've found that they're usually very happy to meet with canvassers. But your co-workers might still have questions. This is your opportunity to address their concerns and help them make a decision about their donation.

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**Here are some of the most common questions and the appropriate answers:**

**It seems there are so many organizations asking me for money. What makes United Way special?**

United Way of Winnipeg is responding to the issues that Winnipeggers themselves have told us are vital priorities: helping children and youth achieve their potential, promoting financial stability and independence, and improving neighbourhood health and personal well-being. These are essentials – things that we all need for a good life. We all win when a child succeeds in school, when families are financially stable and when people are happy and healthy.

## **How much of my donation actually goes to programs and services in the community?**

Your donation is invested directly into United Way's overall community strategy. A provincial government grant supports United Way's cost of fundraising and administration.

## **I'm concerned about protecting my privacy. What does United Way do with my personal information?**

United Way collects information to administer transactions, meet donor expectations and provide recognition. For detailed information, please see our Privacy Policy at: [www.UnitedWayWinnipeg.mb.ca/privacy.html](http://www.UnitedWayWinnipeg.mb.ca/privacy.html)

## **Why should United Way decide where my money goes?**

United Way brings together the people and resources necessary to create lasting change and provide solutions that prevent problems from happening in the first place. We do this by working within a wide network of experts, trained volunteers and staff in partnership with community organizations, ensuring that our combined dollars achieve maximum results.

## **I feel pressured to give to United Way.**

No one should feel pressured to give. United Way works because so many people contribute voluntarily. The choice to give is entirely your own. A workplace campaign is your chance to get involved helping create opportunities for a better life for everyone.

## **Why should I give? I never use any of these services.**

You would be surprised how many people have benefited from the work of United Way without knowing it. Often, a family member, close friend or neighbour has received support from a United Way agency partner. By building partnerships and investing in proven strategies, United Way addresses immediate needs and funds long-term solutions to pressing issues that ultimately affect us all.

## **How can I make my donation to a particular registered Canadian charity?**

Through United Way's Donor Directed Giving Service, you may make a donation to any registered Canadian charity, with a cost-recovery fee of \$12 per transaction. Gifts directed to other charities will be recognized by the recipient organization.

## **Why is United Way asking me to increase my gift?**

The hard economic reality for any individual or organization is that costs go up over time. United Way asks donors to consider increasing their gifts to United Way in order to sustain existing services and build innovative new solutions to community problems.

*It's important to realize that United Way is the only non-profit organization that provides core operating funding to many community organizations. Operating funds need to increase proportionately to costs and needs. When these organizations have stable operating budgets, they are in a better position to find new ways to provide long-term solutions. Like any investment, your increased investment now will pay greater dividends in the future.*

## Tips for Responding to Questions

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### **Listen and empathize**

Make sure the person feels you are hearing their concerns. Show that you understand the objection, but don't agree with them. Instead, say: "I understand why you feel that way. Have you considered...?"

### **Encourage questions and discussion**

Let people express themselves. Welcome their questions. It gives you an opportunity to address their concerns and correct any misconceptions they might have about United Way.

### **Relax and be yourself**

You have an important idea to present. Making the information your own will help you relax. You should never feel like you have to argue or match wits with anyone. Your job is simply to convey to people that United Way is an effective way to create opportunities for a better life for everyone.

### **Don't worry if you don't know the answer**

You're not expected to know everything about United Way. If you don't know the answer to a question, tell people you will find the answer and get back to them. Contact your Sponsored Executive or a United Way staff person for any information you might need.

## United Way Giving Levels

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Each year, United Way looks to committed supporters to make a personal donation that reflects their desire and ability to positively impact the lives of all Winnipeggers.

United Way is proud to recognize four giving levels – Major Donors, Leaders of the Way, Partners and Friends – outside the levels for corporate giving. Each option gives donors special recognition and provides inspiration for others to give at similar levels.

## Tax Benefits

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United Way donations fully qualify for charitable tax credits provided by the federal and provincial governments, so donors can save money on their taxes.

## Invest In Our City's Future

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		<i>Annual Gift</i>	<i>Net Cost After Tax Savings</i>
<b>Friend</b>		\$100	<b>\$73</b>
<b>Partner</b>	Bronze	\$365	<b>\$235</b>
	Silver	\$550	<b>\$334</b>
	Gold	\$730	<b>\$430</b>
<b>Leader of the Way</b>	Pathfinder	\$1200	<b>\$682</b>
	Builder	\$2400	<b>\$1325</b>
	Pacesetter	\$3600	<b>\$1969</b>
<b>Major Donor</b>		\$5000+	<b>\$2719+</b>

Your gift will result in a non-refundable tax credit. This table represents approximate numbers.

## Donor Directed Giving

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### **Giving to Other Registered Canadian Charities\***

Through United Way's **Donor Directed Giving (DDG)**

**Service**, you may make a donation to any registered Canadian charity.

United Way is committed to continuing to offer the DDG Service for donors who have specific philanthropic interests, with a cost-recovery fee of \$12 per transaction. The fee is a flat amount rather than a percentage of the directed gift because the administrative costs incurred by United Way to offer the service are the same whether a directed gift is \$50 or \$500. Gifts directed to other charities will be recognized by the recipient organization.

Donations made through the **Donor Directed Giving Service** are:

- Recognized by the recipient charity, not by United Way
- Charged a cost-recovery fee of \$12 per transaction to cover processing costs
- **Not** included in United Way's campaign achievement

Donations to **United Way** will continue to be:

- Recognized by United Way
- Processed without a cost-recovery fee
- Included in United Way's campaign achievement

*\*Donations to specific charities that are paid in full during the fall campaign are paid in full to the recipient charity early in the new year, after the campaign is complete. Donations to specific charities paid in installments (such as through payroll deduction) are forwarded to the charities as they are collected, each quarter starting in April to ensure that United Way does not pay out more than it collects.*

have  
your  
say!

# urban exchange nge

Urban Exchange is a United Way of Winnipeg Advisory Panel. It's a way for Winnipeggers and United Way to talk with each other in order to find solutions to issues that most concern them in the city.

As part of workplace campaign strategy, Urban Exchange is a chance for donors to learn more about United Way and to build awareness about the issues that face our community.

As you canvass, consider directing individuals to the Urban Exchange website and encourage them to have their say:

[www.MyCityMySay.ca](http://www.MyCityMySay.ca)



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