



United Way
Alberta Capital Region

Change starts here.

myunitedway.ca

Ambassador Guide

Best practices, ideas and advice to help make your workplace campaign canvass a success



Give. Volunteer. Act.

Thank-you!

“I would like to give my heart felt thanks to all United Way Volunteers. When I started the process of trying to find a home for my children, household goods, childcare and transportation, I was in need of the many programs United Way supports. I reached out to many different agencies in Edmonton and all of my needs were met. Today, I volunteer with United Way as a Discovery Speaker. Giving back brings my heart great joy!”

-Pamela Spurvey-



Visit myunitedway.ca to learn more about Pam Spurvey's story.

With United Way, it's not about supporting one cause. In fact, it's something far more profound.

Each and every contribution becomes part of a major community building effort that works to achieve an inspiring vision. It's a vision where we all live with financial stability and independence, where all neighbourhoods are safe and residents have a sense of well-being, and where all children are getting the right start in life and have the support they need to get them through the middle years and their high school graduation.

At United Way, we bring together organizations, businesses, governments and community members who care about the issues we face in the Alberta Capital Region and make every effort possible to turn the vision into reality.

We have participation by over 50 agency partners in the social services sector, delivering key community impact programs and initiatives. It is why, with United Way, donations and support go farther and wider than any other charitable investment a community member can make.

That's what a shared vision is about and what it takes to be the change we all want to see in our community.

2,421

People in Edmonton
are without a
permanent home

53,000

Children in Alberta
live in poverty.

1 in 4

Students do not
graduate from high
school in Edmonton



Introduction and Table of Contents

Welcome

This guide has been prepared to help you lead a successful workplace campaign canvass. Included is information about United Way, canvassing tools, and other helpful resources. You will also find a guideline to help you represent United Way in your Ambassador role.

Contents

Ambassador Role Description	2
Prepare / Meet / Follow-up Guidelines	3—4
Tax Credits and Tools	5
Leaders of the Way	6
Canvasser Tips	7
Privacy Statement	8



Employee Campaign Ambassador Volunteer



United Way
Alberta Capital Region
Change starts here.
myunitedway.ca

An Employee Campaign Ambassador is appointed by the Ambassador Coordinator to approach workplace employees and ask for campaign support.

There are many benefits that come with the Ambassador role. You will receive recognition as a leader in your organization, develop project management and team building skills, expand your awareness of community needs and how they are addressed, and know that you are making a personal investment in your community.

Some responsibilities of the Ambassador include:

- Becoming knowledgeable about United Way, member agencies and its impact in the community
- Attending committee meetings when required
- Discussing strategies with the Employee Campaign Chair or the Ambassador Coordinator
- Meeting with employees according to the pledge drive plan and timetable
- Regularly reporting pledge drive progress to the Ambassador Coordinator
- Following up to collect outstanding pledge forms and answer any outstanding questions
- Returning pledge forms to the designated volunteer
- Conducting an evaluation on the strengths and weaknesses of the pledge drive and making recommendations for next year

United Way is committed to protecting private information and maintaining the confidentiality of personal information under our control. All United Way volunteers and representatives are required to act in accordance with the principles in United Way's Privacy Statement and shall not disclose any confidential or private donor information without the express consent of United Way. United Way's privacy statement can be viewed at myUnitedWay.ca and is provided to volunteers.

15132 Stony Plain Rd ■ Edmonton, AB ■ T5P 3Y3

Investments made by individuals in the workplace make up over 60% of the dollars raised for our community through United Way each year. As an Employee Campaign Ambassador you will have a direct impact on the success of our community campaign.

Below is a suggested guideline to help you 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

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

TIP

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

TIP

Meet

INSPIRE your colleague by describing the campaign, goals, opportunities to participate, and what's involved

EDUCATE your colleague by sharing your story / message that helps explain the United Way and the impact on the community

REVIEW the pledge package and options with your colleague (if offered in your workplace, discuss the convenience of payroll deduction)

RESPOND to questions (or promises) and give your response)

ASK for his/her investment

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

PROCESS completed pledge form and return to your colleague of the pledge form submission box, person collecting, etc)

THANK your colleague for his/her investment

Follow-up

ing the workplace cam-
participate and why you're

COLLECT all outstanding pledge forms, even when em-
ployees have chosen not to invest

ing a compelling fact /
n the value of United
community

RETURN all pledge forms, cash, and cheques to your point
person within the set time frame

pledge form with your
place, promote the con-

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

se to follow-up with a

THANK your colleague when he/she has made a decision

community a better place

ange lives and improve

s or inform your col-
lusion process (i.e. drop

r time and/or investment

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

TIP

Tax Credits

Combined federal and provincial income tax credits on charitable gifts made by Albertans are now 25% on the first \$200 and 50% on gifts above the \$200 threshold. The following chart demonstrates the benefits:

Donation	Total Tax Credit	Cost to Donor	Cost Per Day
\$100	\$25.50	\$74.50	\$0.20
\$365	\$133.50	\$231.50	\$0.63
\$500	\$200.00	\$300.00	\$0.82
\$1,000	\$450.00	\$550.00	\$1.51
\$5,000	\$2,450.00	\$2,550.00	\$6.99

Your generosity can make a difference! Consider that...

- * \$0.63 per day will assist up to 10 seniors with yard work, snow shoveling and house cleaning
- * \$1.51 per day will pay for five women to attend a ten week program to assist in dealing with the impact of abuse

Online Tools

Visit our website at myUnitedWay.ca for materials to support your canvass including:

- * Campaign Clip Sheets — to demonstrate how various amounts can make a difference when using payroll deduction
- * 2010 Results Document— for an overview of results achieved in the Alberta Capital Region
- * Frequently Asked Questions— for quick answers to those common questions
- * Canvassing 101 Video— watch a video with tips and suggestions for hosting a successful workplace canvass



The Leaders of the Way program provides recognition to individuals who give to the United Way at a level of \$1,000 or more. Supporting Leaders of the Way in your workplace can dramatically increase your overall campaign achievement and increase the impact your organization has in the community. Your workplace can run a successful Leaders of the Way program in conjunction with your campaign by:

- * Holding a Leaders of the Way presentation to promote Leadership giving
- * Recruiting a volunteer to canvass previous and potential Leaders
- * Promoting gifts of Stock and Securities
- * Explaining tax credits



Leaders of the Way

Founders	\$1,000—\$1,749
Pacesetters	\$1,750—\$2,499
Builders	\$2,500—\$4,999
Patrons	\$5,000—\$9,999
Sustainers	\$10,000—\$24,999
Leaders' Council	\$25,000—\$49,999

Benefits of Being a Leader:

- * Inspire others and set a profound example of giving
- * Obtain additional information about how your gift is making a difference in our community throughout the year
- * Receive invitations to United Way functions, including Leadership events
- * Recognition in our annual Leadership Roster
- * Tax laws encourage philanthropy—the more you give, the greater the tax credit

A Leader with United Way can help improve the lives of many. Here are some examples of Leadership gift investments:

- * \$1,000 provides 3 months of baby supplies for 5 families
- * \$2,500 assists 8 at risk youth gain and maintain meaningful employment
- * \$5,000 provides lunch to 1278 hungry kids at school

Change starts here.

Canvasser Tips:

- * Share your passion for the cause—explain why you personally give to United Way. A personal story always has more impact.
- * Be yourself—your enthusiasm and commitment will motivate others to give.
- * Don't take things personally—if someone says “no”, try to determine why and address their objection.

You are not asking for yourself! You are asking for the community!

TIP



Overcoming Objections:

1. *I can't afford it.* Even the smallest gift has impact—use an example. Use Payroll deduction to spread out the donation over a full calendar year.
2. *Economic situation.* Many people are facing job losses, and the need in the community is great. United Way agencies are feeling impact through greater demand for resources.
3. *I'm already giving to other charities.* Consider this an opportunity to engage in further conversation. Respond with a comment like, “That’s great. Since you understand that positive impact of giving, perhaps you could also consider a gift to our community.”
4. *I'm unhappy with United Way.* Ask for additional information and listen to what the person has to say. Follow up on issues by talking to your United Way Campaign Manager. Make sure to report back to the person with the concerns.

United Way is committed to protecting private information and maintaining the confidentiality of personal information under our control. In order to ensure the protection of this information, we have adopted the following ten privacy principles established by the *Canadian Standards Association Model Code for the Protection of Personal Information*.

Accountability – We are responsible for maintaining and protecting personal information under our control.

Identifying Purposes – When personal information is requested, we will identify the purposes for which it will be used at or before the time the information is collected.

Consent – An individual’s knowledge and consent will be obtained for the collection, use, or disclosure of his or her personal information, except where required by law.

Limiting Collection – We will limit the collection of all personal information to only what is necessary to meet the identified purposes.

Limiting Use, Disclosure, and Retention – We will use or disclose personal information only for the purpose in which consent has been provided, or as required by law. We will retain personal information only as long as is necessary to fulfill the identified purposes.

Accuracy – We will keep personal information as accurate, complete and up-to-date as is required to fulfill the identified purposes.

Safeguards – We will protect personal information by using security safeguards that are appropriate to the sensitivity of the information.

Openness – Upon request, we will provide information about our policies and practices related to the management of personal information.

Individual Access – Upon request, we will provide individuals with information related to the existence, use, and disclosure of any of their personal information, and will provide access to this information under the conditions stated in our privacy policies.

Challenging Compliance – Any concerns relating to our privacy policies and practices can be forwarded to our Privacy Officer at 780-990-1000 or at privacyofficer@myunitedway.ca

“Personal Information” means information about an identifiable individual, but does not include business contact information (as per PIPA – Alberta’s Personal Information Protection Act).

