CAMPAIGN GUIDE





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Why Centraide?

5 GOOD REASONS TO RUN

A CENTRAIDE CAMPAIGN

01

Centraide's goal is to break the cycle of poverty and social exclusion to make our community a better place that benefits everyone.

02

Thanks to its territorial analyses, Centraide can **invest where needs are most urgent** and **adapt its strategies** to **the realities of each neighbourhood.**

03

Centraide **helps 800,000** people in Greater Montreal and supports more than **375** community agencies and collective projects.

04

If the agencies supported by Centraide had to raise this money on their own, **fundraising costs would increase by \$9M**, and this amount would therefore **not go directly to the people who need it.**

05

By running a Centraide campaign at your company, you can **spend some amazing moments connecting with your coworkers.**



TAKING ACTION TOGETHER FOR AN INCLUSIVE GREATER MONTREAL WITHOUT POVERTY





Did you know?

Thanks to
everyone's
contribution, we
can bring help
and comfort to
thousands of
people every year.

There is still much to do and we need help from all to continue to support critical needs.

Centraide of Greater Montreal has been fighting poverty and social exclusion for over 50 years.

Our territorial analysis

allows us to invest where needs are most urgent and adapt our strategies to the realities of each neighbourhood. We support a network of over 375 community agencies and collective projects that bring people together and make an impact.

Our actions have sustainable impacts on the living conditions of more than 800,000 people, or 1 out of 5 people in Greater Montreal.

More than 50%

of Quebecers living in poverty reside in Greater Montreal. It's **315,045 people with low income.**

28%

of renter households in Greater Montreal spend **too much of their income on housing** (over 30%), which compromises their ability to meet other basic needs (food, clothing, transport). + 46%

is the increase in the number of people using food assistance every month in Greater Montreal since the pandemic (395,895 people in 2021-2022 versus 270, 915 in 2019).

24,000

eligible households on the Island of Montreal are on the waiting list for **social housing,** and the wait time can be many years.

20%

of Quebecers, or 1 in 5 people, will suffer from a mental health problem in their lifetime. People with low income are at a higher risk of experiencing mental health issues.

X2

In 2022, **51,340** asylum seekers entered Quebec, which is twice as many as in 2019. The vast majority settle in Montreal. These people are at an increased risk of falling into poverty and social exclusion.



Every year, Centraide of Greater Montreal supports more than 375 community agencies and projects. The funding is concentrated in four areas.



FOR A STRONG AND COHESIVE SOCIAL FABRIC

- Resilient communities that can rise up to challenges
- People's engagement in their communities
- Access to resources that community stakeholders need



FOR DECENT LIVING CONDITIONS

001(211101(0

- Access to decent and affordable housing
- Food security
- Equitable access to resources and support for balanced mental health





FOR YOUNG PEOPLE'S PRE-SENT AND FUTURE SUCCESS

- A good start in life for all children
- Academic and social success
- Family environments that foster development
- Help at every stage on the road to adulthood



FOR INCLUSIVE

COMMUNITIES

- Caring communities that let everyone realize their full potential
- A plurality of voices within communities
- Equitable access to resources and support to help people overcome social isolation

What is my role?

RAISE AWARENESS INSPIRE ENGAGE ASK THANK

ECD

As the Employee Campaign Director (ECD), you are the one who organizes the employee campaign at your workplace. You recruit, train, lead and motivate the members of your campaign committee and ambassadors to reach your campaign's participation and financial goals.

Ambassador

As an ambassador, you are **the voice of Centraide's message** with your coworkers to **raise their awareness** and **ask them to donate** to the campaign. You are a vital link in your organization's campaign.

Campaign committee

As a **campaign committee member,** you ensure that the campaign's orientations are followed and that each stage of the campaign runs as smoothly as possible.

LCD

As the Leadership Campaign Director (LCD), you organize the Leadership campaign for donors who are part of the Leaders' Circle, giving already \$1,200 or more, and for people with the potential of giving more and becoming Leadership Donors themselves.

Support team

Whether your skills are in the areas of accounting, information technology or even management, the campaign committee is counting on you to make the Centraide Campaign a resounding osuccess.



RESOURCES AT YOUR DISPOSAL





YOUR CENTRAIDE RESOURCES

Centraide's team is there to help you conduct your campaign. A Centraide staffer will be your philanthropic development advisor and will work with you throughout the year. You will also have the support of an Associate, Philanthropic Development (an employee loaned or sponsored by a Centraide partner business, agency or organization) from September to December. Do not hesitate to turn to them if you have questions or need advice.

CURIOUS?

You're already involved in your Centraide campaign. But have you ever thought about the significance of philanthropy more broadly? If you'd like to delve deeper into the world of philanthropy,

Centraide can help you learn more.

Contact your advisor for information about basic concepts such as the donor pyramid, concentric circles and the importance of donor retention.

PHILANTHROPIC DEVELOPMENT ASSOCIATE PROGRAM

The Associate, Philanthropic
Development program (ADP)
provides Centraide with
additional human resources
without increasing its
management costs. During the
critical annual campaign period,
APDs work with Centraide staff to
support and advise the organizers
of workplace fundraisers.

There are two ways to participate: loan or sponsorship.

For more information about the benefits for your organization, contact your Centraide advisor!



How can I make my campaign a success?

5 TIPS FOR AN OUTSTANDING CAMPAIGN!

03 RAISE AWARENESS

- Give your team and coworkers the Centraide Experience (<u>see pages</u> 23-26)
- Visit <u>Campaign space</u> and make use of Centraide's promotional tools (posters, awareness videos, infographics, etc.)

01 PLAN

- Study your previous campaign
- Establish your campaign goal
- Set your deadlines
- Create a strategy with the help of your Resource Development Officer

02 ENGAGE

- Enlist the support of your CEO
- Enlist the support of the union (if you have one)
- Set up a campaign committee that is motivated and reflects the diversity of your company and all donation levels

04 ASK

- Meet with your coworkers
- Organize special and original events (launches, draws, competitions, etc. (see pages 9-13)
- Attend training sessions

05 THANK

- Properly thank everyone who has donated (email, phonecall, etc.)
- Thank the people who has given their time for the greater good of the campaign



Do you want to revitalize your electronic solicitations?

Talk to the Centraide team about the tools you can use to create a memorable online campaign.



THE AMBASSADOR'S ROLE



Have you signed on as a Centraide campaign ambassador? THANK YOU. Enjoy it!

Inform

BY TALKING ABOUT REAL FACTS, IT IS EASIER TO GET THE ATTENTION OF YOUR COWOR-KERS. TO ACHIEVE THIS GOAL:

- Explain Centraide's role in the community (see pages 18-22);
- Talk about your own involvement and gift;
- Give examples of testimonials from beneficiaries of the community agencies supported by Centraide available on the Campaign Space by clicking here;
- Use thematic content available the blog section of our website <u>by clicking</u> here.

Ask

OFTEN, THE MAIN REASON WHY
PEOPLE DON'T GIVE IS BECAUSE
THEY SIMPLY HAVEN'T BEEN
ASKED! WHEN MEETING YOUR
COLLEAGUE, REMEMBER THESE
TIPS:

- Meet your co-workers (face-to-face or virtually);
- Explain the advantages of payroll deduction:
- Follow up by answering their questions;
- Speak from the heart.

Thank you

SINCERELY THANK EACH
OF YOUR CO-WORKERS
(DONORS AND NON-DONORS)
FOR THEIR TIME AND
PARTICIPATION.

Show understanding and be tactful when someone makes an objection. Don't judge—some people need more time. Make them aware of what Centraide does, little by little, without pressure. If they don't give this year, they may give next year. To help you answer their questions, consult the FAQ (see pages 31-36).

ORGANIZING AN EVENT IN 7 EASY STEPS!





01 IDENTIFY YOUR TARGET CLIENTELE

Who is your target audience? Are you targeting all employees, Leaders only, or unionized employees? The type of audience will impact your event content and format.

02 COME UP WITH
AN IDEA

Your event should reflect the resources at your disposal, the time you want to invest, the nature of your workplace, your campaign theme ... and your personal tastes! You will have to include a component to raise awareness about Centraide of Greater Montreal's role. Virtual events are good options that can be easily adapted to your specific reality. Given the context of remote work and virtual meetings, we recommend that campaign launches or awareness events do not exceed 30 minutes. Feel free to make your event interactive by engaging your co-workers with surveys and quizzes.

03 CHOOSE THE DATE

Is this a quiet or busy time at your office? Considering the nature of the event, would it be best to hold it in the morning, at noon or in the evening? At the beginning, in the middle or at the end of the week? Strategically, what is the best time to reach the greatest number of people? Will the event be held virtually or in present?

O4 ENLIST THE SUPPORT OF MANAGEMENT AND THE UNION (IF APPLICABLE)

The presence and participation of management and the union will encourage your coworkers to take part. This is a simple and easy way to showcase the importance of the campaign for your organization.

O5 ESTABLISH A SCHEDULE AND INDIVIDUAL RESPONSIBILITIES

To ensure that everything is ready to go when the event happens and that everyone keeps smiling! Make sure you have a resource person on hand to provide technical support.

06 PROMOTE THE EVENT AND INVITE YOUR COLLEAGUES

Promote your event in an email broadcast or on your intranet. Don't forget your team members who don't have access to a computer. Post notices on the board or promote it during team meetings. All tactics are good ones to get visibility and encourage your coworkers to participate!

07 THANK EVERYONE

An email, a card, a virtual badge, a handwritten note or mention during a team meeting are some of the many examples that you can use to thank your team and the participants. Your coworkers' efforts deserve to be recognized. Thank your donors for their presence and their generosity. And invite them to participate again next year!

WHY ORGANIZE AN EVENT?

An event is an opportunity to set the tone for your campaign, raise awareness among your colleagues, and help them discover Centraide in a fun way. Fundraising events should always be held **AFTER** everyone has been asked to donate individually to avoid undermining payroll giving: "I already gave to Centraide by going to the virtual auction."

EVENT IDEAS TO INSPIRE YOU





PRIZE DRAWS

For everyone who:

- Donates for the first time
- Donates by payroll deduction
- Gives more than last year
- Makes a donation before a given date

gets a chance to win:

- An extra vacation day
- A great parking spot
- A gift offered by one of your suppliers

SEASONAL HOLIDAYS

Halloween or Christmas contest:

contest for best-decorated pumpkin, best Halloween costume, best-decorated department, etc.

— Craft market:

sale of decorations, homemade gifts, or gifts from sponsors.

— Pre-cooked meals:

sale of small frozen meals pre-made by colleagues in anticipation of a long weekend.

Holiday auctions:

Christmas tree ornaments, gifts from sponsors, etc.



SALES AND CONTESTS

Virtual auction

Get suppliers to sponsor items or your managers to give away prizes and put them up for auction on a virtual platform.

-50/50

50/50 event is a sure way to get people involved. You can do a 50/50 on its own or with another activity.

Skills development

Sell tickets to let your co-workers expand their skills sets with courses in mixology, baking, wine tasting, knitting, music, etc.

Activity passport

Sell a passport that lets people take part in multiple activities.

Art contest

Invite your colleagues and their families to participate in a photo contest (travel orlandscape) or in a drawing competition made by children or colleagues) in order to organize a paying exhibition with the winning works.

Cookbook

Create a cookbook with your colleagues' favourite recipes. Explore the world of desserts or discover different cultures. This virtual item is easy to create and sell.

SPORTS CHALLENGES

AND COMPETITIONS



Sports Challenges

INDIVIDUAL

Each person does their own sports activity (running, walking, cycling) individually on the same day or during the same week.

IN GROUPS

Everyone meets over a virtual platform to do different activities in their backyard or living room.

VIDEO GAME TOURNAMENT

People compete against their colleagues over an online gaming platform (e.g., Mario Kart, Rocket League, Dance Dance Revolution, etc.).

Cooking competition

BEST PASTRY CHEF

People meet virtually over their lunch break to show off their culinary creations. Everyone votes for the best presentation.

WORST PASTRY CHEF

Everyone takes a picture of their worst culinary creation and votes for the ugliest result!

Interactive competition

Tongue-twister or funny-face challenges, asking people "Why I love my neighbourhood," etc. are a few ideas to get people laughing and interacting.

VIRTUAL MEETING



- Dress up for Centraide

Make your virtual meeting fun by encouraging people to dress up (e.g., wacky hats or wigs, 1980s theme, etc.).

— 5@7, Thank god it's thursday

Raise your troops' morale with on online virtual hang-out at the end of a work day!

Talent contest

Plan a time for your colleagues to show off their talents! Selling tickets to enter or having people pay to cast votes are just some ways to make this contest the best it can be.

Day without zoom

Sell tickets that allow employees to take advantage of a day without meeting on Zoom.

— Quiz

In collaboration with Centraide, develop a quiz with questions about poverty and social exclusion.

Truth or day

Pay an amount to ask your manager a question or dare them to perform a challenge. The manager has to pay if they refuse to answer or do the challenge.

Virtual cooking workshop

Schedule a time when your colleagues can prepare a little lunch together. Everyone cook and eat the same thing!



Office pentathlon

Centraide departments face off in the paper ball toss, the precision roll in the hall, the wheelchair race, and more.

Trivial pursuit contest

Between management and employees by betting on the winners.

Rock-paper-scissors tournament

between different teams to identify a champion.

 Challenge issued by management to employees

which, if successful, forces management to undergo a fun test.



ELECTRONIC PLATFORM

You can use a number of electronic platforms to make your virtual event a reality. Zoom, Teams, Facebook, Skype, Webex and Google Meet are just a few examples. Before choosing your platform, you need to check whether it is available at your company and confirm with your IT department that the platform meets your internal IT security standards.

Make sure you have a resource available on the day of your event to help you with the technology. If possible, test it out a few days beforehand to get familiar with the platform.

Recurring Payroll Deduction

HAVE YOU CONSIDERED

RECURRING PAYROLL DEDUCTION?



The recurring payroll deduction is an autorenewable contribution by payroll deduction. The recurring payroll deduction allows an organization to build and improve its campaign, to simplify the logistics of confirming donation and to free up time to raise awareness. Donors will always be able to make changes or even cancel their donation during the annual Centraide workplace campaign or at any time during the year. Recurring payroll deduction enables Centraide to secure a portion of its revenues year after year and thereby support its essential network of community agencies.

All organizations can apply DAS for charitable contributions, but this approach is particularly interesting for organizations in which:

there is less employee proximity (teleworking, factory/warehouse staff on day, evening or weekend shifts);

offices are located at different sites;

donations are made using paper forms;

only one or two people make up the campaign committee.



HOW TO IMPLEMENT RECURRING PAYROLL

DEDUCTION IN 4 STEPS



Contact your
Centraide Resource
Development
Officer to create
your recurring
payroll deduction
strategy.

01

Top management approval

Get the agreement of top management to begin implementation.

Show testimonials from organizations that have already implemented recurring payroll deduction. Explain the benefits of recurring payroll deduction for donors, the organization and Centraide.

03

Communication plan

Identify how the organization will communicate this change to your employees. Use all your communication channels:

- ambassadors
- solicitation and thank you emails
- intranet
- employee meetings with management
- etc.

Use every opportunity you have to remind people that donation by payroll deduction will be recurring and that the donor can choose to change or cancel at any time.

02

Choose your renewal approach

Favour the recurring payroll deduction in OPT OUT mode:

- by automatically renewing the previous year's payroll deduction donations
- by using the upcoming campaign as the starting point for this option

Donors who do not want to give by recurring payroll deduction will have the option of giving by credit card.*

04

Advice

Reward recurring payroll deduction donors with thank you, acknowledgement, and loyalty strategies.

Focus on acquisition and growth strategies that will enable the organization to solicit new donors during the campaign.



^{*}Note: The OPT IN mode also exists, but this means that the organization and the ECD must work with two lists (those who have accepted the renewal and those who want to remain on an annual basis) which is not ideal from a workload perspective.



Community involvement

YOUR RETIREES



ARE YOU CANVASSING RETIREES FROM YOUR ORGANIZATION?

After many years of loyal service, retiree are leaving your organization to start a new chapter in their life. It is possible for retirees to continue their monetary or community involvement to Centraide. Retirees are loyal donors who can help you energize your campaign. They should not be forgotten!

HOW TO CANVASS YOUR RETIREES?

Centraide provides a lot of material to support your organization when canvassing. A personalized guide specific for canvassing retirees is available to download in the Campaign Space. In just a few clicks, you can download a Word document that can become an important tool to develop your strategy to canvass retiree. Sample letters and emails are also available.

YOUR EMPLOYEES



ARE YOU CANVASSING YOUR NEW EMPLOYEES WHEN THEY JOIN YOUR ORGANIZATION?

Canvassing your new employees is an opportunity to raise awareness and to showcase your organization's core values by promoting your community involvement and Centraide. You can promote your community involvement during welcoming presentations or in the documentation given at the time of hiring. The Centraide team is there to help you identify good deployment strategies!

Not sure where to start or how to improve your campaign?

Your Centraide Resource Development Officer is always available to discuss the best strategies for your organization, to support your teams, your campaign and to explain which material is best for your organization.



An employee is leaving?

Don't forget to ask if they want to pursue their monetary contribution to Centraide!



What do I need to run a successful campaign?



1 OUT OF 5 PEOPLE RECEIVES OUR HELP. 5 OUT OF 5 PEOPLE BENEFIT FROM IT.

For this special year marking our 50th anniversary, we are launching a new ad campaign that will run for two years until August 2025.

This campaign will highlight the invaluable work of Centraide and the over 375 community agencies and projects in its network that help 800,000 people every year in Greater Montreal.

This campaign is driven by a powerful message: that every person helped by Centraide becomes an agent of change who contributes to the well-being of all of society. We can confidently state that when **1** out of **5** people receives our help. **5** out of **5** people benefit from it.

This ad campaign reminds us that every act of generosity and every gesture of support helps transform lives and build a more inclusive, poverty-free society.

Community involvement will play an essential role in the success of this campaign. We encourage you to actively share this content to maximize its impact.

CAMPAIGN TOOLS AT YOUR DISPOSAL

You have access to many tools to help make your campaign a success. From posters and videos to testimonials and infographics, you can find plenty of messages to encourage your coworkers to get involved. **Giving to Centraide means giving back to all of society.**





Get these tools at campagne.centraide-mtl.org/en or from your Centraide team.

CAMPAIGN PRINTED POSTERS

Size: 18 x 24 (pre-printed) or 11 x 17 (PDF).

Content: Campaign posters.

How to use them: Post them in your offices, in your cafeteria, at fundraising events, for employees who are back to their physical offices.

Specifications: Printed by Centraide/ limited quantities/get them from your resource development officer or Associate, Philanthropic Development. You can also download them from your Campaign Space.





TESTIMONIALS

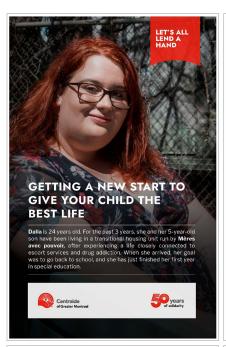
Format: 11 x 17 (PDF)

Content: Pictures that highlight the faces of Centraide.

How to use them: Newsletters, support for donation asks, etc.

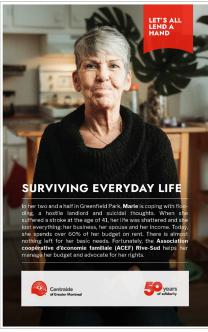
Specifications: Download from your Campaign Space.

Can be printed from a regular printer.













STORIES

Size: 8,5 X 11 (PDF)

Content: Stories of people helped by Centraide-supported agencies.

How to use them: Newsletters, support for donation asks, etc.

Specifications: Download from your <u>Campaign Space</u>. Can be printed from a regular printer.







SOCIAL MEDIA KIT

Size: Word and Jpeg for visuals

Content: Sample messages, visuals for your social networks, examples of content to share, etc.

How to use them: Publications to inspire you and share on your workplace social networks, to spread the

word about the Centraide campaign and show your commitment.

Specifications: Download from your <u>Campaign Space</u>.







CAMPAIGN VIDEOS

Format and length: MP4 / Varied lengths

Content: Campaign videos highlight the impact of Centraide-supported agencies.

How to use them: Canvassing during your campaign: social media, intranet, emails, presentations at meetings, etc.

Specifications: Download from your <u>Campaign Space</u> or view on Centraide's YouTube channel.

STORIES OF PEOPLE HELPED BY CENTRAIDE-SUPPORTED AGENCIES



THE ADVERTISING CAMPAIGN



OUR 50-YEAR JOURNEY IN VIDEO



DIDN'T FIND WHAT YOU WERE LOOKING FOR ON THIS LIST?

Each year, campaign tools (eg: virtual thermometer, wallpaper, online platform form, etc.) are created by Centraide of Greater Montreal to help you during your campaign. To discover all the tools, visit the Campaign Space.

With the the <u>Campaign Space platform</u>, you can - in just a few clicks - select and download materials you want to use for your campaign.

DO YOU NEED PRE-PRINTED VISUALS FOR AN EVENT?

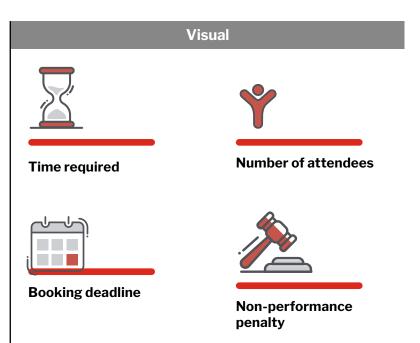
Centraide of Greater Montreal has a wide range of pre-printed materials (thermometers, aprons, stickers, etc.) to help you promote your campaign and events. Contact your Centraide advisor or Associate, Philanthropic Development to discuss options and delivery times.

ENGAGEMENT AND MOBILISATION TOOLS



THE CENTRAIDE EXPERIENCE

We are committed to helping you make your campaign a success. To do this, Centraide has developed a range of engagement and mobilization activities aimed at raising awareness of our community's issues and providing your colleagues with a memorable and inspiring experience: the Centraide Experience.





For more details, to book an activity or to learn more about online options, contact your Resource Development Officer or your Associate, Philanthropic Development.





RAISE AWARENESS WITH AN IMPACT STORY

VIDEO TESTIMONIAL

🛮 10-45 min



5 working days

Video testimonial from an agency's spokesperson about a social issue.

Take advantage of a team meeting to make your co-workers aware of the impact of a donation to Centraide through a presentation by a Centraide representative, including a video testimonial on a poverty-related issue.

IMPACT TESTIMONIAL

10-12 min



10 working days

An impact testimonial (in person or on video) from a spokesperson for an agency supported by Centraide.

Present a moving impact testimonial from a spokesperson for an agency supported by Centraide at your campaign launch or fundraising event.

PANEL DISCUSSION

20-60 min



25+

14 working days

Panel discussion on a social issue with a community network expert.

Invite your potential and current Leaders to a panel discussion. The panelists could be representatives of agencies supported by Centraide, members of the business community and/or Centraide managers. Certain conditions apply. Discuss with your advisor to determine the best strategy.

RAISE AWARENESS WITH A LOCAL IMPACT TOUR



VIRTUAL TOUR OF A NEIGHBOURHOOD

🛮 30-45 min

***** 25+

🗂 5 working days

Explore a Greater Montreal neighbourhood and find out about its issues and your contribution's impact through a live virtual presentation by a Centraide advisor and an informational video.

SOCIAL ISSUES WALKING TOUR

🕍 45-60 min

Y max 12

🛅 10 working days

Take an outdoor walking tour of a Montreal neighbourhood and the agencies Centraide supports with a Centraide ambassador as your guide. Give your ambassadors an inside look at Centraide and its neighbourhoods agencies.



VISIT TO AN AGENCY

***** 8-10

20 working days

Invite your ambassadors, business leaders and major donors to an agency visit (predetermined selection of dates and agencies). It's a great way to motivate your ambassadors before your campaign launch. You can also set up a recognition visit at the end of the campaign to acknowledge outstanding commitment.

Note: Predetermined selection of dates and agencies

RAISE AWARENESS THROUGH DIRECT INVOLVEMENT

GROUP VOLUNTEERING

ACTIVITY

20 working days for the reservation of a time slot

🛅 10 working days to receive the list of confirmed participants for the activity

Encourage your co-workers to volunteer at a local agency for a day or half a day.

It's a rewarding experience in which the volunteers get a hands-on look at the work of an agency supported by Centraide and contribute directly to efforts to help the most vulnerable people in the Greater Montreal area.

Note: Predetermined selection of dates and agencies.

* It is important to make the volunteers aware of the importance of the activity and the effect on the agency and its users if they cancel. Cancelling an activity with less than 72 hours notice could result in a penalty of up to \$500 for the company.

PRODUCT DRIVE

🕍 variable

🖞 25+ kits

🛅 10 working days

Organize an inclusive, unifying giving event (hybrid format possible), lunch or picnic.

Launch a product drive with an awareness video or a link to a Centraide blog post. Then ask your co-workers to collect items and assemble individual kits tailored to an agency's needs.

The items might be non-perishable foodstuffs, personal hygiene products, items for a Christmas drive, or backpack stuffers for summer camp or the new school year.

Note: Delivery to a local agency must be provided by the company or the participants.

REGULAR INDIVIDUAL OLUNTEERING

Individual volunteering is usually recurring and requires a sustained commitment, adequate supervision, training adapted to the clientele, and a criminal background check by the agency. Centraide supports the Volunteer Centres, which have expertise in this type of pairing, and the Information and Referral Center of Greater Montreal, the main manager of the 2-1-1 line.

Find your local Volunteer Centre: https://www.fcabg.org

2-1-1 line and website: https://www.211gc.ca

Local volunteering opportunities are also posted on

Bénévole.ca https://www.jebenevole.ca



Lenders
CIRCLE



How do I make my leadership campaign a success?

WHO ARE POTENTIAL LEADERS?

01 LEADERSHIP DONORS

FROM LAST YEAR

65%

of Leader Donors from 2022 renewed their donations in 2023.

02 PRE-LEADERS

Donors who were not Leaders last year but who gave between \$1,000 and \$1,199.

03 PROSPECTIVE

LEADERS

Employees who have the potential to donate \$1,200 or more depending on their salary level (all employees / managers above a certain salary level) or their role in the company (managers, executives).

THE IMPORTANCE
OF ASKING

A personalized ask (call or meeting) is the first step in getting a donation!

When people don't give at this level even when they can, it is generally because they don't think it's possible. A personalized ask will help them realize that they can indeed make a significant impact in their community.

PSSST...

THE CENTRAIDE CHALLENGE

The Centraide Challenge matches any increase of 10% or more from a current Leader and matches any new Leader donation (of \$1,200 or more). A simple and effective way to enhance your donation! The Centraide Challenge encourages people to join the Circle of Leaders and progress. Don't hesitate to promote the Centraide Challenge to your current Leaders and potential Leaders!

Leaders CIRCLE

WHY SHOULD PEOPLE BECOME CIRCLE LEADERSHIP DONORS?

01 TO BE A LEADER OF

CHANGE IN THEIR

COMMUNITY

Leadership donations represent

30%

of workplace donations

Ask in person, via videoconference or by phone.

V

The success rate for recruiting a new donor is

35%

when the ask is personalized



THANK TO IMPROVE LOYALTY

Thank your Leadership Donors at the end of the campaign by offering them recognition at your organization for better retention the following year.

02 TO DOUBLE THE

IMPACT OF THEIR

DONATION THROUGH THE

CENTRAIDE CHALLENGE

For all new Leadership donations,

the Hewitt Foundation and our corporate partners in the Centraide Challenge will give Centraide a matching donation! 03 TO JOIN THE LEADERS' CIRCLE

04 TO GET INTERNAL

RECOGNITION

(see pages 29 · 30)

How to ask for Leadership donations?

Organize a special event

Organize a **special event** (physical or virtual) for **current and prospective Leaders**.

Awareness and solicitation messages will be tailored to each audience. Get your executive team, internal influencers and/or Leadership spokesperson to speak about why they donate to maximize peer encouragement and visibility.

Promote gifts of securities

which offer significant tax benefits. Promotional material is available in the Campaign Space by cliking here.

Make Leadership donations accessible

by letting people know they can spread out their donation through payroll deduction: giving small amounts regularly is much easier than giving a large amount all at once.



How to recognize and thank your Leadership Donors?

RECOGNITION IDEAS TO INSPIRE YOU

It goes without saying that Centraide would like to warmly thank all donors for their generosity. But did you know that donors also appreciate being recognized by their employers?

Recognition can prompt current donors to maintain or increase their gift and can encourage potential donors to make a great decision by becoming a Leadership Donor.

That's why we are sharing these ideas, which you can **tailor to your workplace and donor profile.** Don't hesitate to share your own ideas with us!

Here's how to recognize your donors' generosity:







SEND A NOTE

Have a senior manager send a personalized thank you email.

Have a senior manager send a personalized note on a card, company letterhead, etc..



DISPLAY YOUR

APPRECIATION

Create a recognition wall (where you can pin up or engrave the name of each Leadership Donor).

Create a "Walk of Fame of Generosity" (place stickers on the floor).

Post "Leadership Donors of the Week" on the staff bulletin board.



GIVE AN ITEM

Put your recognition message on a cup, water bottle, reusable bag, pin, button, etc.(e.g., "Born to be a Leader," "Proud Leader").

Create a recognizable icon for the person's office or work station (e.g., office door, cubicle partition, home office).

Use an impactful slogan (e.g. Born Leader, Proud Leader, etc.).



USE YOUR VOICE

Leave a personalized voice mail message.

Thank them in person (by invitation or informal visit).

Mention their donation at an event: year-end party, 5@7, staff party, team lunch, lunch 'n' learn, etc.



VIRTUALLY

Create a virtual space on your intranet and create a page dedicated to Leadership Donors.

Have the executive hold a special moment during a planned meeting to highlight the generosity of Leaders.

Stress the importance of Leadership Donors with something like a virtual filter or icon that they can display on your internal platforms (intranet, Teams, etc.).



Frequently asked questions

WHAT IS THE IMPACT OF MY DONATION?

Donations to Centraide are soundly invested to make the biggest impact for people in difficulty.

By giving to Centraide, you are supporting a network of more than 375 community agencies and projects that help 800,000 people in Greater Montreal.

We all benefit from a community in which everyone has the same chance to live in dignity and fully contribute to society.

I CAN'T AFFORD TO GIVE.

Have you thought giving through payroll deduction? It's the easiest way to fit a donation into your budget because you can give smaller amounts with each pay. And charitable donations also entitle you to a tax credit, which means that a donation of \$4 a week will only cost you \$2.67 after tax, or \$0.38 per day.

I GIVE TO OTHER CHARITIES.

Did you know that by giving to Centraide of Greater Montreal, you are supporting a network of more than 375 community agencies as well as many causes and vulnerable people in Montreal, in Laval and on the South Shore? The agencies funded by Centraide support youth success, take care of the essentials, break social isolation, and build caring communities.

I'D RATHER GIVE DIRECTLY TO A CHARITY.

A KPMG-SECOR study of nearly 30 agencies found that if each agency supported by Centraide had to raise by itself the money that Centraide provides, the cost of fundraising would increase by \$9 million. Funding for community activities would then be reduced by this amount. This represents added value of \$9 million!

MY DONATION WILL HARDLY MAKE A DIFFERENCE.

The gap in the standard of living between the well-off and the disadvantaged grows throughout a person's lifetime, which means that early intervention is important to help people find their way out of hardship. Every donation to Centraide is important. When added up, the donations of thousands of people become a powerful tool for our communities. **Every dollar given to Centraide has an impact on people in need.**

NO ONE IS STARVING TO DEATH IN GREATER MONTREAL.

That's because there are agencies that help people when they are in trouble. Also, **the reality of poverty has changed.** Everywhere, people are living under the low-income cut-off. More and more people are poor, even in neighbourhoods or areas that used to be considered well-off. We don't yet know the full impact of the pandemic. The real-life effects of the crisis show how much community agencies will continue to be heavily involved in providing support on the ground. Centraide's support to help them take action is **needed now more than ever.**

WHAT MAKES CENTRAIDE DIFFERENT?

Centraide is a strategic and proactive social investor that acts locally.

The goal of Centraide's territorial approach is to fight poverty and social exclusion.

The 375 community agencies and projects that receive funding from Centraide help support youth success, take care of the essentials, break social isolation and build caring communities. These actions help our neighbourhoods develop thanks to lasting changes.

By providing funding and support, Centraide ensures that its investments promote complementarity, collaboration and collective work among different agencies.

Centraide reinforces cooperation and partnerships between different community stakeholders (school, health care network, boroughs).

Funding allocation decisions are made by committees of volunteers and experts.

WHAT DOES CENTRAIDE OF GREATER MONTREAL DO?

Centraide aims to break the cycle of poverty and social exclusion in the Greater Montreal region, which consists of Laval, the Island of Montreal and the South Shore. It supports a network of dynamic and inclusive agencies and projects that work in four areas of action:

For young people's present and future success

(A good start in life for all children, Academic and social success, Family environments that foster development, Help at every stage on the road to adulthood).

- For decent living conditions

(Access to decent and affordable housing, Food security, Equitable access to resources and support for balanced mental health).

For inclusive communities

(Caring communities that let everyone realize their full potential, A plurality of voices within communities, Equitable access to resources and support to help people overcome social isolation).

For a strong and cohesive social fabric

(Resilient communities that can rise up to challenges, People's engagement in their communities, Access to resources that community stakeholders need).

WHY SHOULD I INVEST WITH CENTRAIDE OF GREATER MONTREAL?

Your donation to Centraide is strategically invested where you live, work and raise your family. Centraide's added value lies in the scope of its network of agencies and the depth of its overall mission, which helps minimize the cumulative impact of poverty on vulnerable people and its repercussions on future generations.

Its four areas of action address the complex social problems facing our community, and Centraide is committed to applying a thorough and efficient process to evaluate needs.

WHY SHOULD I GIVE
TO CENTRAIDE OF
GREATER MONTREAL
WHEN I CAN GIVE
DIRECTLY TO
AN AGENCY?

Centraide supports more than 375 community agencies and projects that help break the cycle of poverty and social exclusion. Centraide raises money so that the agencies it supports can focus their precious time and human resources on implementing programs that will change the lives of vulnerable people in our community. For example, a KPMG-SECOR study found that if each agency supported by Centraide had to raise the money it receives through the Centraide campaign on its own, the related fundraising costs would increase by \$9 million.

What's more, Centraide has created lasting partnerships with key social development stakeholders to create long-term strategies and address our community's most problematic social challenges while soundly managing the money it raises. That's why, with Centraide, your donation goes further than with any other philanthropic community investment.

HOW ARE INVESTMENT DECISIONS MADE?

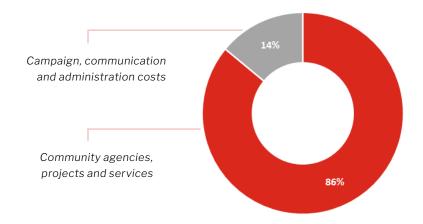
Centraide wants to work with effective and relevant organizations within the context of a clear understanding over a specific period of time. Qualified staff and experienced volunteers make investment decisions based on community needs, research and financial criteria. Centraide invests in community agencies that show effective performance.

Performance criteria include:

- Social relevance
- Development of strategies for lasting solutions
- Impact measurement
- Capacity for collective action
- Sound management and governance

WHAT PERCENTAGE OF MY DONATION IS INVESTED IN THE COMMUNITY?

86% of your donation is directly invested in the community. Centraide relies on its Associate, Philanthropic Development program (employees who are loaned out or sponsored for the campaign period) to keep costs as low as possible. Our administrative costs are among the lowest in Canada. The Canada Revenue Agency (CRA) considers 35% to be an acceptable standard for administrative costs. As a registered charity in Canada, Centraide of Greater Montreal submits an annual T3010 information return to the CRA that details all of our financial activities, related operation costs, executive compensation, and other costs. The CRA's latest T3010 Registered Charity Information Returns can be found at: www.cra-arc.gc.ca.



HOW DOES CENTRAIDE OF GREATER MONTREAL KEEP ITS COSTS SO LOW?

Our administrative costs are kept low in several ways:

- 22,000 workplace volunteers help us run our annual campaign.
- 160 incredible volunteers support our management and governance, canvas during the annual campaign and allocate funds to agencies.
- Strategic partnerships allow us to leverage additional human resources at no cost. These initiatives include the Associate, Philanthropic Development Program (temporary employees are loaned out or sponsored to provide support throughout the campaign period).

I FEEL PRESSURED TO GIVE.

DOES CENTRAIDE

ENCOURAGE THIS?

No one should ever feel pressured to give. Everyone should have the chance to make an informed choice when it comes to donating to charity.

WHY SHOULD I MAKE A LEADERSHIP DONATION (\$1,200 OR MORE)?

Giving \$1,200 or more every year to Centraide makes you a member of the Leaders' Circle. The Centraide Challenge matches any new Leader donation and matches, for current Leaders, any increase in donation of 10% or more compared to last year. It is a simple and effective way to enhance the impact of a Leader donation.

WHEN WILL I RECEIVE MY TAX RECEIPT?

Tax receipts for one-time donations (cash, credit card, cheque, automatic bank debit and gift of securities) are issued within three weeks following the receipt of the donation.

Tax receipts for ongoing commitments during the calendar year (by credit card or automatic bank debit) will be issued in January the following year.

If your gift to Centraide is made through payroll deduction, the amount collected during the fiscal year will be listed on your income tax forms (T4 and Relevé 1).



Regulations for tax receipt

It is possible to give to Centraide by making donations in the form of cash, credit card, payroll deduction, debit, securities, life insurance or through wills.

To meet the requirements of the Canada Revenue Agency, Centraide of Greater Montreal, as a philanthropic organization, must abide by certain rules about collecting donations and issuing receipts.

PAYROLL DEDUCTION DONATIONS

No receipts are issued for donations made through payroll deductions. The amount of the contribution should appear on the T-4 and Relevé 1 forms for employees in the boxes reserved for charitable donations.

DONATIONS IN THE FORM OF CASH, CREDIT CARD, CHEQUE, DEBIT OR SECURITIES

Centraide of Greater Montreal issues receipts for donations of \$20 or more for which the donor has received no valuable consideration.

Tax receipts for one-time donations will be issued within three weeks after being process. Tax receipts for multipayment commitments made during the calendar year (by credit card or debit) will be issued at the beginning of the following year before February 28.

As an eco-friendly initiative and to keep our administrative costs low, tax receipts are sent by email (unless otherwise specified by the donor.) We also invite you to check your spam box if you are unable to find your donation receipt in your primary mailbox.

DONATIONS THROUGH A THIRD-PARTY PLATFORM

If your donation is made through a platform that is not managed by Centraide of Greater Montreal, the issuance of the tax receipt is managed by the third-party platform (eg Benevity, etc.).

CONTRIBUTION TO A 50/50 DRAW

"In a 50/50 draw, the winner gets 50% of the proceeds from the sale of tickets on that day and the other 50% is used for charitable or religious purposes by the licensee, which is a non-profit corporation, association or society for charitable or religious purposes (source: www.racj.gouv.qc.ca)."

To hold a 50/50 draw using Centraide of Greater Montreal's license, the following conditions must be met:

- Amount must be maximum \$5.000
- In-person draw
- Notify your Centraide advisor (or associate), who will give you a letter of authorization and delegation of the 50/50 draw permit to the designated person.

Exceptions:

- A receipt may be issued if the winner decides to donate their prize to Centraide of Greater Montreal. In this case, the employer must attest to this in writing to Centraide of Greater Montreal.
- The license must be displayed in full view of the participating public in the location where the drawing is conducted.
- Centraide of Greater Montreal must also display the view of the participating public and also a description of the purposes for which this license was issued to it.

IN-PERSON 50/50 DRAW

The rules for holding an in-person 50/50 draw are:

- The tickets must be sold by an individual and handed directly to the purchaser;
- The tickets must have at least two parts, each bearing the same number or identifier;
- The sale of the tickets and the draw must take place on the same day;
- The prizes must be monetary amounts and may be paid in cash, by cheque or another method recognized by financial institutions;
- The name of the licensee, the license number and the price of the ticket must appear on the ticket;
- The prizes must be determined and announced after ticket sales have closed, which must be 10 minutes before the draw;
- The prize must be claimed within 15 minutes after the winning number is announced;
- The winner must sign the ticket.

SPECIAL ACTIVITIES

When donors receive an benefit (like goods or services) during an activity organized as part of the Centraide campaign, they must not be issued receipts.

Exception: A receipt may be issued when the amount paid for the activity is clearly greater than the real value and is readily identifiable. Examples: jeans day, fund-raising supper without a lottery, a book of photocopied recipes. In this case, the employer must give Centraide of Greater Montreal written evidence.

Assessing fair value is very difficult and can be debated from all angles and can put the donor's donation receipt and Centraide's right to issue receipts at risk. It is therefore essential to dissociate the participation fee from the donation in order to avoid any confusion.

No receipts may be issued for lotteries, auctions or games of chance organized as part of the Centraide campaign.

Exception: A receipt may be issued if the winner decides to donate his/her prize to Centraide of Greater Montreal.

DONATION IN CONNECTION

WITH A RUN / WALK

When organizing a run/walk, bear in mind:

- No tax receipt will be issued for the cost of registration as it is difficult to assess the fair market value of taking part in a run;
- Additional donations made in connection with the event are eligible for tax receipts, according to Canada Revenue Agency rules;
- It is important to contact your advisor or associate to coordinate the forwarding of the required information for the issuance of tax receipts for additional donations (e.g. file containing participants' first name, last name, home mailing address, email address, amount of donation);
- Assessment of the fair market value of participation in the run / walk is difficult and subject to review by Canada Revenue Agency.

GOLF TOURNAMENT

When organizing a golf tournament, bear in mind:

Donation in connection with a golf tournament

- The registration fee is not eligible for a full tax receipt;
- Issuance of a tax receipt for a portion of the registration fee is based on the market value, as determined by Accounting;
- Additional donations over and above the registration fee are eligible for tax receipts, according to Canada Revenue Agency rules;
- It is important to contact your advisor or associate to coordinate the forwarding of the required information for the issuance of tax receipts for additional donations (e.g. file containing participants' first name, last name, home mailing address, email address, amount of donation);
- Communications by the company organizing the golf tournament must clearly state that only the additional donation is eligible for a tax receipt;
- If a portion of the registration fee (as determined in advance by Centraide and the organizer) is eligible for a tax receipt, communications by the organizer must clearly indicate the portion so that donors know what to expect.

Donation in connection with an event

- Donations for sponsorships or auction prizes are not eligible for tax receipts for the full amount;
- This portion of the donation may, however, be claimed as an "advertising expense" by the company on its tax return.



Net donation cost 2022-2023

DID YOU KNOW?

Charitable donations qualify for provincial and federal tax credits. Keep your receipt for your tax return.

The deduction is calculated as follows:

35% for the first \$200 (i.e. 15% at the Federal and 20% in Quebec).

53% of the excess of \$200 (i.e. \$29 at the Federal and 24% in Quebec).

Please note, certain restrictions apply.

DONATION PER PAY

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DONATION	PER PAT	DONATION	PER DAT	TEARLY DUNATION	
	After tax		After tax		After tax
\$16.00	\$10.40	\$0.53	\$0.34	\$192.00	\$124.80
\$20.00	\$12.40	\$0.66	\$0.41	\$240.00	\$148.80
\$24.00	\$14.28	\$0.79	\$0.47	\$288.00	\$171.36
\$42.00	\$22.74	\$1.38	\$0.75	\$504.00	\$272.88
\$60.00	\$21.20	\$1.97	\$1.03	\$720.00	\$374.40
Leadership donation		Leadership donation		Leadership donation	
\$100.00	\$50.00	\$3.29	\$1.64	\$1200.00	\$600.00

4 pays/year

	Aftertax		After tax		After tax
\$8.00	\$5.20	\$0.53	\$0.34	\$192.00	\$124.80
\$10.00	\$6.20	\$0.66	\$0.41	\$240.00	\$148.80
\$12.00	\$7.14	\$0.79	\$0.47	\$288.00	\$171.36
\$21.00	\$11.37	\$1.38	\$0.75	\$504.00	\$272.88
\$30.00	\$15.60	\$1.97	\$1.03	\$720.00	\$374.40
Leadership donation		Leadership donation		Leadership donation	
\$50.00	\$25.00	\$3.42	\$1.64	\$1248.00	\$600.00

DONATION PER DAY

YEARLY DONATION



YEARLY DONATION

YEARLY DONATION

Net donation cost 2022-2023

DID YOU KNOW?

Charitable donations qualify for provincial and federal tax credits. Keep your receipt for your tax return.

The deduction is calculated as follows:

35% for the first \$200 (i.e. 15% at the Federal and 20% in Quebec).

53% of the excess of \$200 (i.e. \$29 at the Federal and 24% in Quebec).

Please note, certain restrictions apply.

DONATION PER PAY

DONATION PER PAY

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DONATION PER PAT		DONATION PER DAT		TEARLY DONATION	
	After tax		Aftertax		After tax
\$8.00	\$5.14	\$0.57	\$0.37	\$208.00	\$133.76
\$10.00	\$6.08	\$0.71	\$0.43	\$260.00	\$158.20
\$12.00	\$7.02	\$0.85	\$0.50	\$312.00	\$182.64
\$20.00	\$10.78	\$1.42	\$0.77	\$520.00	\$280.40
\$30.00	\$15.48	\$2.14	\$1.10	\$780.00	\$402.60
Leadership donation		Leadership donation		Leadership donation	
\$48.00	\$23.94	\$3.42	\$1.71	\$1248.00	\$622.69

DONATION PER DAY

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	After tax		After tax		After tax
\$4.00	\$2.57	\$0.57	\$0.37	\$208.00	\$133.76
\$5.00	\$3.04	\$0.71	\$0.43	\$260.00	\$158.20
\$6.00	\$3.51	\$0.85	\$0.50	\$312.00	\$182.64
\$10.00	\$5.39	\$1.42	\$0.77	\$520.00	\$280.40
\$15.00	\$7.74	\$2.14	\$1.10	\$780.00	\$402.60
Leadership donation		Leadership donation		Leadership donation	
\$24.00	\$11.97	\$3.42	\$1.71	\$1248.00	\$622.56
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DONATION PER DAY















ON BEHALF OF THOUSANDS OF PEOPLE WHO BENEFIT FROM YOUR COMMITMENT TO CENTRAIDE, THANK YOU AND HAVE A GREAT CAMPAIGN!

Centraide of Greater Montreal 493 Sherbrooke Street West, Montreal, Quebec, H3A 1B6 info@centraide-mtl.org 514 288-1261

Let's all lend a hand