



# CANVASSING METHODS

There are several different ways to canvass. In all cases, face-to-face canvassing by peers is strongly encouraged. Effective canvassing can be done either one-on-one or in a group setting.

Review the following canvassing methods and decide which approach is most appropriate for your organization. Depending on the composition and size of your organization, you may need to adopt a combination of methods.

**Peer-to-peer canvassing**—This highly effective method involves recruiting and training enough Ambassadors to approach co-workers individually and ask them to support United Way.

**Group canvassing with one-on-one follow-up**—This very successful method is probably the most commonly used. First, employees are given an opportunity to learn about United Way by watching a speaker video, listening to a United Way Speaker and/or watching the United Way campaign video. Second, Ambassadors follow up with employees to answer questions and invite them to be part of a making a difference in our community.

**Group canvassing**—This is an effective method because the request for support is still made in person. The message is consistent, requires fewer Ambassadors than one-on-one canvassing and can be done in a 15-30 minute session. Paper pledge forms can be distributed (and collected) during the session.

**Letter or email canvass**—This is the least effective method of canvassing and is not recommended.

## Typical group canvassing agenda (can also be used for a campaign kick-off)

1. **Welcome** — ECC
2. **Management/Union endorsements** — CEO/Union President
3. **Campaign overview (dates, goals, events)** — ECC
4. **Campaign video**
5. **United Way Speaker** — United Way Staff Partner, Speakers' Bureau Volunteer or speaker video
6. **Questions and answers** — All
7. **Request for donations** — ECC
8. **Thanks and conclusion** — ECC

Before deciding on which canvassing method(s) to incorporate into your campaign, try to answer the following questions:

- Is every employee currently being asked for their support?
- Are they being asked personally i.e., one-on-one canvass, group canvass or through some other method of personal contact?
- Are there groups of employees who may require a special approach i.e., home-based workers, part-time workers, shift workers, retirees?
- Are you currently running a Leadership campaign? Are Leadership prospects and donors canvassed personally?

- How many Ambassadors will you need to ensure every employee receives a personal ask? (Guideline: one Ambassador for every 15 employees.)
- Where are your employees located (all in one building or in several locations)?

**Special groups**—There may be several employee groups that require a special approach.

These include:

- **GenNext**—Do you have employees in their 20s and 30s who are not greatly engaged in your United Way campaign? You may want to recruit a GenNext Ambassador to sit on your campaign committee. For more information visit [unitedwaygt.com](http://unitedwaygt.com)
- **Part-time, home-based workers and telecommuters**—Try to involve part-time workers in your campaign. If these individuals are on-site, invite them to campaign events and provide them with paper pledge forms. For employees who work off-site, communicate campaign information to them via phone, email, newsletter, etc. Ensure that you provide a pledge form and a return envelope for their convenience. If you have numerous part-time, home-based workers and telecommuters, consider recruiting a committee member to coordinate this special approach.
- **Shift workers**—If your workplace operates more than one shift, it is extremely important to develop a campaign plan that involves every employee on every shift. If you are holding group canvass sessions, be sure to arrange them for each shift. If it is impossible to take employees away from their jobs, consider holding group canvass sessions and/or campaign events during shift changes. Recruit Ambassadors from every shift to ensure full coverage and to maintain enthusiasm throughout all shifts.
- **Retirees**—Retired employees can make a significant contribution to your campaign, if you ask. You may want to recruit a Retiree Chair to sit on your campaign committee.