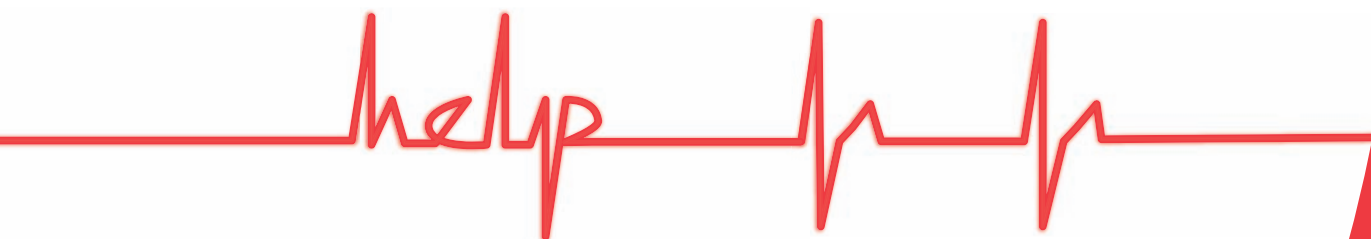


Heart Month / Person to Person Zone Leader Resource



YOUR TIME IS OUR LIFELINE.

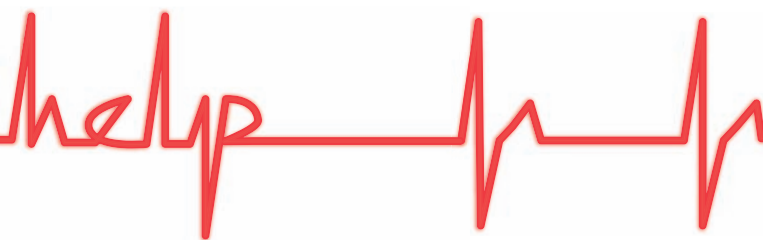
PUT YOUR HEART INTO IT.™
MAKE A DIFFERENCE.



HEART &
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OF BC & YUKON

Finding answers. For life.

Heart Month / Person to Person Zone Leader Orientation Guide



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Orientation Guide

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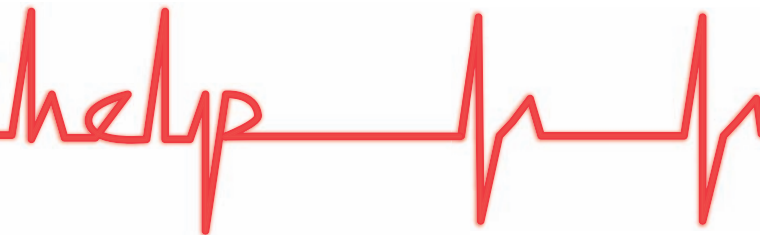
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Zone Leader Orientation Guide

Welcome

Welcome to the Heart and Stroke Foundation! You are part of an amazing team of more than 54,000 volunteers and employees nationally who are working to raise vital funds for heart and stroke research and to increase the heart health awareness of all Canadians.

Our goal in this training guide is to give you the information and resources you need to be a successful zone leader. The training guide is designed to inform you about the Heart and Stroke Foundation and provide an overview of the Person to Person/Heart Month campaign and familiarize you with your responsibilities as a zone leader.



Heart and Stroke Foundation of BC & Yukon

Mission Vision and Values

Mission

Our mission is for life

The Heart and Stroke Foundation, a volunteer-based organization, leads in eliminating heart disease and stroke through:

- the advancement of research and its application,
- the promotion of healthy living, and
- advocacy.

Vision

Generations free of heart disease and stroke

Statement of Values

- The Foundation will be a leader in all that we do, stressing excellence, innovation and continuous improvement.
- The Foundation will strive for the highest ethical behaviour and will be accountable for its conduct.
- The Foundation's success depends upon people working as volunteers, donors, partners, and staff. The Foundation will create an environment which will provide rewarding and meaningful opportunities for those contributing to its cause.
- The Foundation believes in collaboration and cooperation. We must form and foster productive relationships with other public and private organizations to optimize the health status of the people of BC and Yukon.
- The Foundation will encourage and recognize the active role and spirit of communities, in and for its successes.
- The Foundation's activities will effectively and efficiently promote its mission and goals.
- The Foundation will improve awareness about opportunities to participate in and contribute to the Foundation.

What Do We Do?

We lead the way in protecting the health of millions at risk of heart disease and stroke – now and for generations to come – by raising funds for research, public education and advocacy.

In 2002, nearly 75,000 Canadians died from heart disease and stroke. Together, they are the most common cause of death and disability.

- An estimated 70,000 to 75,000 people have heart attacks each year.
- An estimated 50,000 people suffer strokes and mini strokes.
- Almost 40% of Canadians will develop some form of heart disease or stroke over their lifetime.
- Our aging population makes it critical to better understand the causes of these diseases.

The Heart and Stroke Foundation of BC & Yukon is a provincial non-profit organization governing 10 area offices across the province.

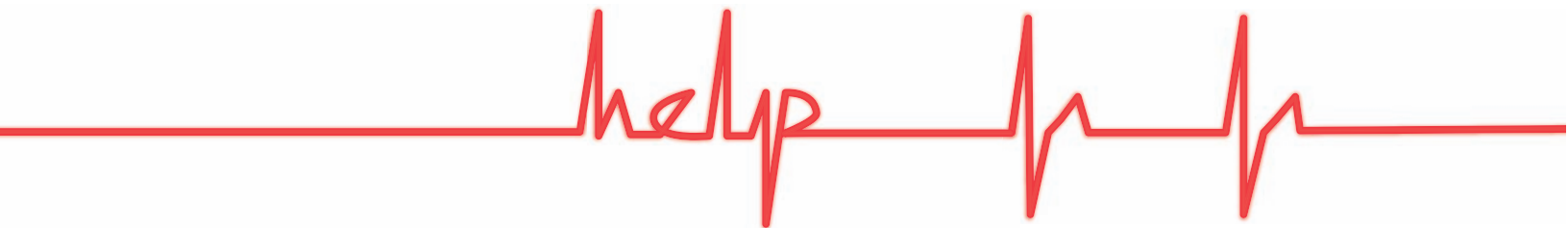


Our History and Research

In 1955, a group of doctors formed the BC Heart Foundation, today called the Heart and Stroke Foundation of BC & Yukon. The Foundation was the second such body in Canada, after Ontario. Since its inception, the death rate from heart disease and stroke has been reduced by 70%.

For over 50 years donors have helped us increase our research commitment so we can fund more projects every year. The Foundation began with \$25,000 in grants and since then has spent over \$100 million on research.

Heart and Stroke Foundation-funded research results in scientific advances that translate into earlier diagnoses, better treatments and new insights into the prevention of heart disease and stroke for the people in your community, your province, your country – and around the world.

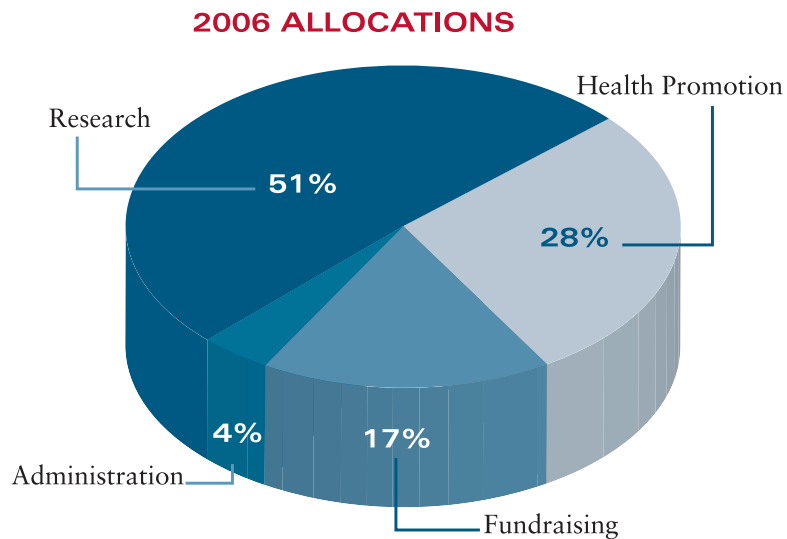


Raising Funds for Vital Research

The Heart and Stroke Foundation is a leading funder of world-class heart and stroke research. We actively support scientific studies looking at causes, prevention and treatment of these diseases.

The Heart and Stroke Foundation of BC & Yukon:

- Funds 38 research programs throughout the lower mainland, that focus on basic bio medical clinical rehabilitation research.
- Is pioneering an innovative healthy eating program in restaurants. It's based on the success of the formula of the Health Check™ program.
- Has increased its research spending to \$7 million annually, maintaining its position as a national and global leader in heart and stroke research.



* 4% represents administration costs

How Does the Person To Person Campaign Fit into Our Mission?

The Heart and Stroke Foundation of BC & Yukon's mission states that:

1. We are a volunteer based organization.

The Person to Person campaign provides us with an opportunity to involve almost 9,000 community-based volunteers in over 90 communities.

2. We lead in eliminating heart disease and stroke through:
 - the advancement of research and its application,
 - the promotion of healthy living, and
 - advocacy.

The Person to Person campaign raises approximately \$1.4 million each year to support this work.

Our values state that:

- The Foundation will encourage and recognize the active role and spirit of communities, in and for its successes.
- The Foundation's activities will effectively and efficiently promote its mission and goals.
- The Foundation will improve awareness about opportunities to participate in and contribute to the Foundation.

Person to Person campaign volunteers knock on almost 300,000 doors throughout BC and Yukon during February "Heart Month" each year. Our canvassers make it convenient for their friends and neighbours to contribute to our mission and create a strong profile for the organization.

The Person To Person Campaign Revenue Goal for this Community?

\$ _____

How Will We Accomplish This?

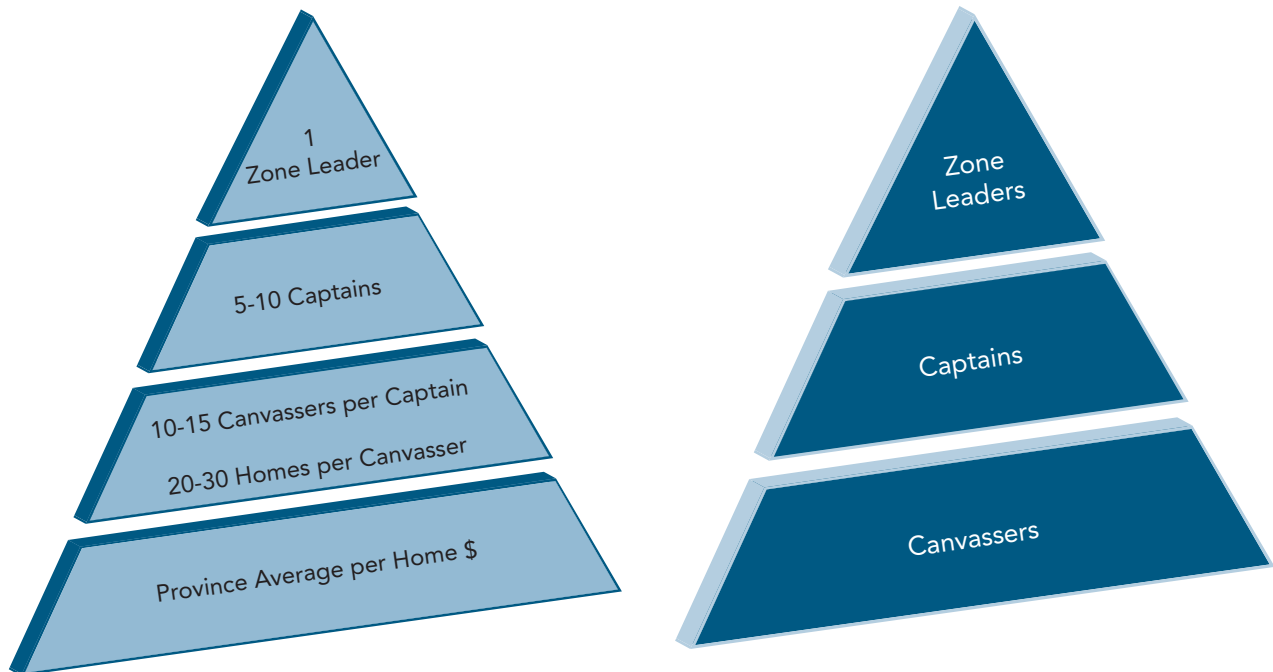
Over the years the Person to Person campaign's success has been largely due to its well established structure. Our P2P pyramid allows the Foundation to attract skilled volunteer leaders and committed canvassers for well defined and manageable roles.

Each community is divided into a number of zones, depending on the size of the community (number of homes) and the revenue goal.

What is a Zone?

A zone is simply a portion of a community.

Example of zone structure



What is a Zone Leader's Role?

A zone Leader is the top leadership position within the Person to Person campaign in BC and Yukon. Zone leaders work with and report to the area office staff responsible for the Person to Person campaign (P2P coordinator). In some communities distant from our area offices volunteer community campaign chairs may also be in place. In these cases the zone leader would work with and report to them.

The zone leader plays an integral role in building a strong team of captains and canvassers to manage a successful zone.

A zone leader is directly responsible for:

- Mapping to keep track of growth or change within the zone (when necessary).
- Recruiting 5 – 10 captains for your specific zone (some captains may already be in place).
- Training your captains and ensuring that they have the materials required.
- Supporting your captains through ongoing communication.
- Monitoring your captain's progress to ensure that they are on track with their goals.
- Reporting your zone's progress to their P2P coordinator or community P2P leader.
- Advising your P2P coordinator or community volunteer leader on volunteers within your zone to be recognized and, if appropriate, taking part in the recognition.

The skills and qualifications of a great zone leader:

- Has good recruitment abilities.
- Is a strong team leader.
- Excels at communication.
- Works well within an existing organizational structure.
- Is outcome oriented.

What are the Personal Benefits of Being a Zone Leader?

- **Short term commitment** – six months maximum.
- **Develop your negotiation skills** – recruiting captains.
- **Enhance your team building skills** – training, motivating and supporting your captains.
- **Display your organizational skills** – forming a strong team and monitoring progress to achieve goals.
- **Build community credibility** – by being part of a well established and trusted organization.
- **Manage your own flexible schedule** – by building and supporting your team from your home base within the timeline established for the successful completion of your duties.
- **See and analyze your results** – at end of the campaign you will see how your efforts contributed to the success of the campaign.

Notes 

What Training and Support will be Provided to You?

This orientation kit is the first step in your training.

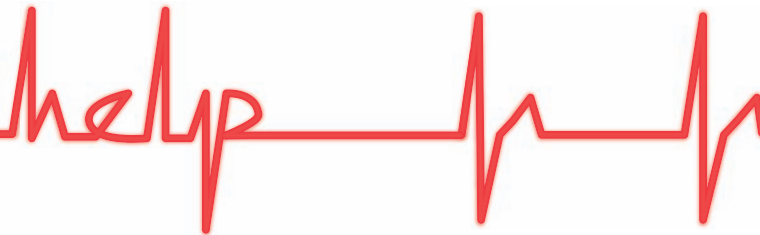
You will receive one-on-one role specific training through a scheduled meeting with your P2P coordinator or community leader.

Your training will include:

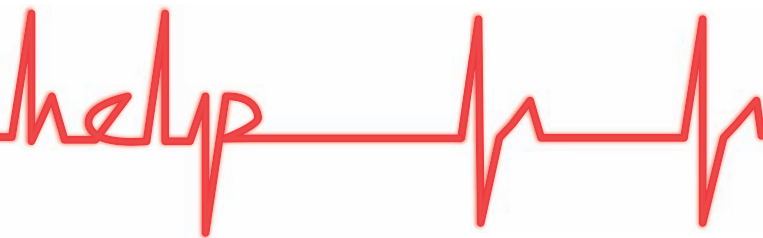
- An overview of your area and community P2P campaign with desired outcomes.
- Setting your zone goals.
- Your role in detail with timeline and communications strategy.
- Reviewing the captains role using the captain's handbook.
- Mapping.
- Planning a recruitment strategy.
- Planning a communications strategy.
- Training and supporting your captains and reporting your progress.
- An orientation to tools of the trade.
- Frequently asked questions.

You will receive all materials required from your P2P coordinator or community campaign leader.

Your P2P coordinator (or community leader) will establish an ongoing communication and reporting schedule.



Heart Month / Person to Person Zone Leader Training Guide



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Zone Leader Training Guide

Thank you for putting your heart into this year's campaign!

Have you reviewed your Zone Leader Orientation Kit?

This Zone Leader's Training Guide will provide you with a more comprehensive overview of your role and is designed to be a reference text. Your guide goes hand in hand with the ongoing support you will receive from the Person to Person staff coordinator in your area office, or, the Person to Person chair in your community.

Please keep in mind, that while it is important for you to understand all aspects of the Person to Person campaign, your responsibility is limited to the team within your zone (see "What is a Zone Leader's Role" in your orientation kit).

Your training guide includes the following:

- **Your Area Office** – contact information and historical data
- **Your Zone Leader Role in Detail**, including timeline and duties
- **Mapping**
- **Recruiting Your Captains** – recruitment methods and a sample script
- **Training Your Captains**
- **Tools of the Trade and How to Use Them**
- **Frequently Asked Questions**

Your Area Office

We are part of the _____ area team.

This volunteer Person to Person team is more than _____ strong.

Area fundraising goal:	Amount raised last year:
Area canvasser goal:	# Canvassers last year:
Your community goal:	Amount raised last year:
Community canvasser goal:	# Canvassers last year:
Zone revenue goal:	Canvasser goal:
Captain goal:	

Your contact at the area office is the Person to Person coordinator:

Name: _____

Phone: _____ **Fax:** _____

E-mail: _____

Or, if you live in a community removed from your area office you may report to:

Volunteer community chair:

Name: _____

Phone: _____

E-mail: _____

Your Zone Leader Role in Detail

Refer once again to **“What is a Zone Leader’s Role”** on page 11 of your orientation kit.

Time Line

Mapping

August

- In some communities where a significant amount of growth has taken place, you may be required to assist by making note of new subdivisions, streets and homes that fall within your zone (mapping). If the Foundation continues to keep abreast of community growth and recruits additional leaders and canvassers to cover new homes, we will maximize our revenue potential.
- If your zone requires mapping, the Person to Person coordinator in your area office will provide you with information on the latest tools and where to access them.

Recruiting 5 – 10 captains for your specific zone

September

- Call last year’s captains to verify they are returning and are able to carry out their normal duties for their area. We will provide a copy of each captains 'canvasser tracking sheets' (green sheets) from last year (a sample script has been provided below if you are a first time zone leader).
- If captains are not returning, ask them which of their canvassers they would recommend for promotion into the captain’s role.

Your Zone Leader Role in Detail (cont'd)

Training your captains and ensuring that they have the materials required – Use the captains handbook provided

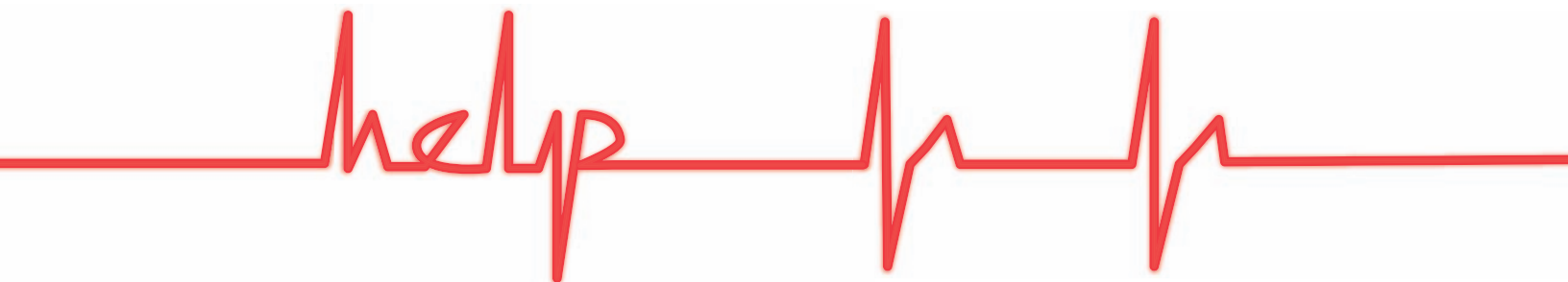
October

- Ask returning captains to begin contacting their canvassers from last year. Note: If you have a large number of new captains you may want to work with your area office contact to arrange for captains training.
- Captains also are a great resource for priority route planning; they know their areas best and can identify areas for priority recruiting, as every route cannot be covered every year.

Supporting your captains through ongoing communication

November

- Call your captains to make sure they have called their canvassers and provided you with the routes that will require new canvassers. Ask your captains to attempt to replace missing canvassers and to update you on their progress (by the end of November at the latest). This is crucial to the campaign's success.
- If your captains are unable to replace their canvassers, report unfilled routes to your area office contact and they will support these needs through the telerecruitment program.



Your Zone Leader Role in Detail (cont'd)

**Supporting your captains and monitoring their progress.
Reporting your zone's progress to P2P coordinator or chair.**

December

- Follow up with captains who have not called, to ensure recruitment is on track.

January

- Deliver kits, guidelines and updated canvasser tracking sheets to captains.
- Arrange for all captains to come together for a kit pick up and training or do it one on one. Either way, the better you prepare captains the better they can train canvassers.

February

- Call captains to ensure that all kits have been delivered to canvassers.
- Mid Month, encourage captains to call canvassers for a "half way there" call. This is to remind them they have only two weeks left. It is important for captains to ask canvassers how their progress is going (i.e. have you had a chance to get out and canvass yet?).



Your Zone Leader Role in Detail (cont'd)

Advising your P2P coordinator or chair of volunteers within your zone to be recognized.

March

- Second week –call captains to see how many kits are outstanding.
- Verify that they have deposited monies to the Royal Bank (if that was the arrangement with them).
- Arrange to pick up kits and canvasser tracking sheets from captains by third week. Be sure to make note of those canvassers and captains that are eligible for the early kit return draw.
- Arrange delivery/pick up by your community volunteer chairperson or PTP staff coordinator.
- Ask if they will be returning next year and be sure that if there is feedback, it is captured on the back of the canvassing kits or directly to your area PTP coordinator.

April

Accept our thanks for a job well done!

Depending on the number of captains in your area, the approximate number of hours you will spend working on the campaign over six months is 20-30 hours total. If you encounter difficulties or challenges, call the PTP coordinator.

Notes 

Mapping

Review the zone/area mapping section of the route planning and mapping training guide with your P2P coordinator and follow the steps laid out.

Recruiting Captains

Planning and implementing a strong recruitment strategy is critical to a successful Person to Person campaign and you, as a zone leader are an important influencer.

There are many ways to recruit captains:

- Contact last year's captains.
- Check canvasser lists and offer successful canvassers a promotion to captain.
- Call your own personal and business contacts.
- Organize a community phone blitz.
- Ask for telerecruiting support.
- Speak to groups e.g. newcomers' clubs, sororities, church groups, etc.
- Offer leadership opportunity to university students.

List other ideas below:

Recruiting Captains (cont'd)

1. **Contact last year's captains and**
2. **Check canvasser lists to offer canvassers a promotion to captain.**

Using the Right Words

You are the direct contact with the captains so before you begin recruiting, develop a script that you are comfortable with:

Here is a *sample* script that you can use as a guideline when making the initial call to returning captains in September/October.

"Hi, it's (Insert your name) and I'm your Heart and Stroke Person to Person zone leader. First, I wanted to thank you for being a captain last year. We really appreciated it.

Second, I wanted to touch base with you and make sure that you'll be returning as part of our dynamic team this February. Are you still in the same area?" (Assume that they are coming back!)

<If they answer YES, explain that you will arrange to get their captains guide as well as their canvasser list from last year to them right away. Tell them how important it is to find out as quickly as possible if their canvassers are returning to allow them to start finding new volunteers to fill in the routes.>

"Name, is there any reason why you can't call them before the end of November so we'll be able to fill in as many routes in your area as possible?"

<This question works well as it lets them know that you really expect them to do it.>

*<If they say no, ask if there was one of their canvassers last year who they think might like to be a captain this year. Call that person and ask. If they say no, please just go down the list and call canvassers to verify that they can canvass and ask if they are ready to move up to leadership.>

Recruiting Captains (cont'd)

Sometimes, a person may choose not to canvass anymore but would enjoy becoming a captain.

If you don't have someone to cover the area, please let us know as soon as possible so we can get a team working on it!

Please remember that your area office staff is always here to support you!

3. Call your own personal and business contacts

The Person to Person campaign's success is based on people asking people to support the Heart and Stroke Foundation during Heart Month (February). Invite neighbours, friends, family and co-workers to become a captain during Heart Month.

Person to Person volunteer team. If you know of someone outside your zone who you think would like to 'put their heart into it' and become a captain let your PTP coordinator know and they will help you place them in their neighbourhood.

4. Organize a community phone blitz

In many communities, Foundation staff work with local volunteer leaders to organize a fun, teambuilding night called a "Phone Blitz". Phone blitzes for the Person to Person campaign have shown some amazing results around the province and have been enhanced by the use of contests, prizes and a lot of fun.

5. Ask for tele-recruiting support

Area offices run annual tele-recruiting programs with a limited budget. Tele-recruiters supervised by Foundation staff cold call neighbourhoods to recruit both canvassers and captains. Tele-recruitment is based on priority routes and the needs within specific zones, once the other three recruitment methods have been leveraged.

Training Your Captains (also see captains guidelines)

You'll see on the tracking sheets in the 'Yrs' column that many of our canvassers and captains have volunteered for a long time. For those people, training needs are limited. For new captains, it takes just a few minutes.

- Ask them to read all the materials in their captains kit. Most of the answers are there!
- Explain the kit (as on previous page), their canvasser tracking sheets and their area.
- Review promotions and prizes (as below).
- Review timeline.
- Establish the lines of communication and why it is important for you to know which canvassers are returning and which routes need to be covered.
- Encourage them to recruit team members, as these people are more likely to commit and complete their route than ones we recruit on the phone.
- Explain that, while every penny counts, part of our job is to get out the Heart Month message so not to be discouraged by people who say no to canvassers.
- Explain the importance of collecting kits by March 9th. (*next page)
- Let captains know if there is a recognition event happening in your community after campaign.

If you can convince all, or even a few of your captains to meet it's an excellent tactic in fostering team spirit and providing an opportunity for returning captains to share their knowledge. It's also a great way of establishing best practices! If you need support with training please contact your PTP coordinator (area office).

Training Your Captains (cont'd)

And finally, don't forget to mention that captains (as well as canvassers) have opportunities to win wonderful prizes.

Here are a few prize details . . .


Canvassers and captains have two ways to be entered to win a prize.

* First, if they return their kit by March 10th, their name will be entered into a draw for a two-night stay at one of the Aviawest resorts. Any active captain also gets one entry for this contest.

Second, if they register on-line to canvass or to canvass on-line before Oct 31st they will be entered into a draw for a \$100 gift certificate donated by The Bay.

www.putyourheartintoit.ca

These prizes are drawn by our Provincial office after the conclusion of the campaign.

Notes 

Tools of the Trade and How to Use Them

Canvasser Tracking Sheet (green sheets) – These are lists used by captains to keep track of their canvassers. You will get an extra copy of all the spreadsheets so you can work with your captains. It is important that captains record the kit number given to each canvasser and the dollar total when it is returned. This is the only way we can track the kits and report them to Revenue Canada.

Upon Return of Kits

On your captains tracking sheets, please record the amount from each area. Also, please make note of any kits that the captain was not able to pick up. We will follow up from the area office.

Canvassing Kit – You will receive enough kits for all the canvassers in the zone or community plus a few extra (in case you get a great response and need another!)

We need you to:

- Package the kits for each captain (be sure to keep track of the kit numbers you have given to each captain).
- Include the canvassers tracking sheets for the captain and any other items.
- The captains guidelines.
- Give them the route maps, any labels etc that go with their area.
- Provide your name and phone number.

Advance Notice Slips – Some canvassers like to do a quick walk around the neighbourhood the last week in January with a notice telling people they will be canvassing on a certain date/week. This helps people know who is at their door and gives a higher success rate. Please provide your captains with a supply of these slips to pass on to their canvassers upon request.

Tools of the Trade and How to Use Them (cont'd)

Deposit Slips – You have a number of deposit slips for the Royal Bank. It is your role as a zone leader to ask each captain to deposit the money as they receive it from their canvassers. This keeps large amounts of cash from accumulating in a captain's home. However, some captains may choose not to make deposits. In this case, we ask that you make the deposit when the kits are returned.

If you are required to make a deposit on behalf of one of your captains, please write **'Deposit to HSF'** on the back of each cheque. You can list cheques on a separate piece of paper if there are more than will fit on the slip. Just give this to the bank teller with the deposit. Copies of all deposits should be given to you with the returned kits so we can verify that all deposits were processed correctly by the bank.

Notes 

Frequently Asked Questions

The Heart and Stroke Foundation of BC & Yukon has a number of fundraising and awareness programs that run throughout the year. Canvassers will occasionally get questions about these. Hopefully, this will help them explain.

Q: I just got a request from the Heart and Stroke Foundation in the mail. Why do you come around too?

A: The Foundation has a number of ways in which we raise the money needed to continue our research. Our direct mail campaign reaches many snowbirds and others who we are not always able to contact at home. (If they have already donated, the canvasser again will thank them and give the brochure.)

Q: I just had school kids at my door collecting. Why do you have so many programs going on in the same month?

A: Our school Jump Rope for Heart and Hoops for Heart programs are great ways of involving kids in their community while teaching them about healthy hearts and getting them physically active. While we encourage them to have their events in other months, some schools like to include the event in their Valentine's Day celebrations because of the heart. We encourage students to ask friends and family, rather than canvass. However, they sometimes get enthusiastic in their efforts on our behalf. (Thank them etc.)

Frequently Asked Questions (cont'd)

Q: What happens to the names provided by volunteers and donors?

A: We are committed to protecting the privacy of your personal information. We may maintain a record of your interaction for donor-related, promotion and tax receipting purposes, where required. Occasionally, we may contact you with mission-related communications. If you wish no further contact or have any questions or concerns regarding the privacy of your personal information, please contact the Chief Privacy Officer, at your provincial Heart and Stroke Foundation office. For further information, you can call: Robert Hager at (604) 736-4404 or check out our website: www.heartandstroke.ca and type "Privacy" in the search box.

If there are other questions for which you don't have the answers, please refer them to our office toll-free: (1-888) 473-4636.

