

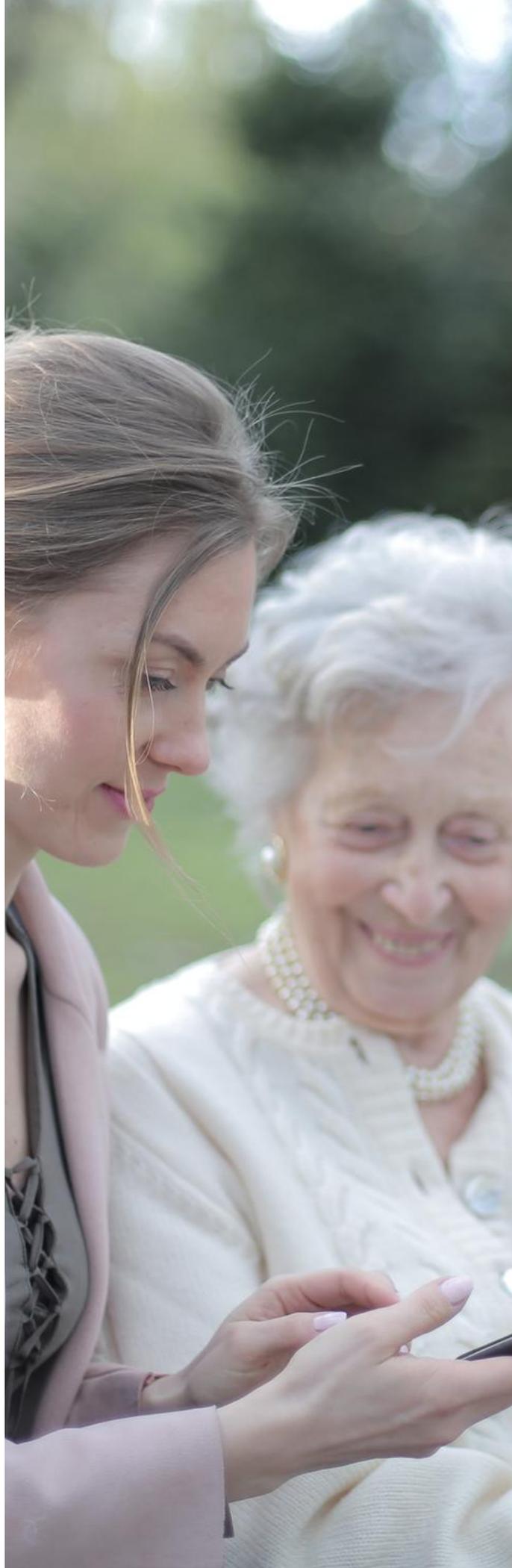
United Way Simcoe Muskoka Ambassador Guide



United Way
Centraide
Simcoe Muskoka

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Role of the Ambassador

Ambassadors are key to the success of every campaign. You are the frontline volunteers who approach your peers in the workplace to raise awareness of United Way's vital role in the community.

Whether working remotely or in-person, Ambassadors will provide your colleagues with an opportunity to make an informed choice about charitable giving by doing these three simple things:

Inform

Share the benefits United Way brings to our communities, like how a donation to United Way sustains a vital social safety net that provides thousands of people – your friends, neighbours, and family – with much-needed support, year round.

Explain how their contribution will make a difference, both in our community and by helping to reach our organization's fundraising and participation goals.

Ask

Ask your colleagues if they would like to support the most vulnerable in our community by making a donation to United Way.

Ask your colleagues if they have any questions they need answered before being able to make a decision about their charitable giving.

Follow up in person or by email with potential donors by answering questions and reaching out to colleagues who were unavailable.

Thank

Thank your colleagues for their time and participation.

Thank you for volunteering your time to canvass your colleagues

By asking for donations to United Way, you will help people who need it most, connecting them to resources and supports they need to thrive.

3 Steps to Successful Campaigning

There are three steps to successful campaigning:

1. Prepare
2. Canvass
3. Follow Up

Prepare

Learn about United Way Simcoe Muskoka's work in our communities

- Attend a training session offered by your workplace
- Visit www.UWSimcoeMuskoka.ca to find out how donations make a difference, learn about community issues and read stories of people who received help from a United Way funded collaborative or initiative.
- Watch a United Way video or listen to a speaker if you have the opportunity.
- Participate in your campaign events (kick-off, wrap-up, special events).

Learn about your workplace campaign

- Learn about your workplace campaign's fundraising participation goals, incentives and key messages

Make your own gift

- Consider your own personal reasons for giving and make your gift first. You will find it easier to ask others for their contribution if you have already made your donation.

Develop a canvassing plan

- Review the list of people you are responsible for canvassing
- Identify the people on your list who you know well. This will be a good place to start and will help you build confidence with your canvassing.

Arrange brief meetings

- Book a series of short meetings (about 15 minutes each) to meet one-on-one with everyone on your canvassing list
- Consider using stories that your colleagues can review before your meeting
- If you encounter a problem or are denied a meeting, advise your ECC

3 Steps to Successful Campaigning

Canvass

Set the tone

- When canvassing, speak face-to-face. If you are unable to speak face-to-face, speaking over the phone is better than email.
- Begin by thanking your colleague for agreeing to speak with you and discussing something that interests you both.
- Explain that the purpose of your meeting is to talk about United Way Simcoe Muskoka, your workplace campaign and to ask for a donation.

Say, "If you have given to United Way before, thank you! Let me take a few minutes to tell you about what your donation has made possible. For example, thanks to your support, United Way was able to fund our communities most urgent needs like support for seniors, food access and mental health counselling."

- Explain your own personal reasons for supporting United Way (i.e., have you or someone you know used United Way funded services?) Talk about an issue you feel strongly about or discuss a certain program or agency that you have researched.
- Outline key facts about your organization's campaign (i.e. past achievement, your campaign goal, average giving amount, participation, etc.)

State your case

Provide information about United Way Simcoe Muskoka's work in the community.

- A donation to United Way Simcoe Muskoka helps support a vital safety net of diverse community agencies that are making a difference every single day during times of both stability and crisis.
- UWSM brings together local government leaders, business leaders and agencies at community tables to coordinate efforts, ensuring efficient and effective work to fill gaps in social services in our communities.
- Since March 2020, UWSM has distributed more than \$2.5 million throughout Simcoe Muskoka through government programs and their own fundraising to help meet the increased needs we are seeing.

Visit www.UWSimcoeMuskoka.ca to learn more about our investments in our communities.

3 Steps to Successful Campaigning

Promote the benefits of giving

- Promote early bird prizes or other incentives to encourage potential donors to decide sooner rather than later
- Talk about how their donation will leverage your organization's corporate match, if applicable.
- Explain the tax benefits of giving, explained on page 7.

Ask your colleagues to support the community by donating directly to United Way Simcoe Muskoka.

- Email each employee information about United Way, like stories and videos.
- *Ask every potential donor "Will you make a donation to United Way? Your gift will help sustain a vital safety net of community agencies providing services to those most in need, when and where they need it most."*
- If someone is unavailable, be sure to book a meeting to follow up.

Answer questions

- Let each person know that you would be happy to answer any questions that they might have
- Listen carefully to any concerns. You will probably be able to respond to most by referring to the Frequently Asked Questions available in our Campaign Toolkit.
- If you are unable to answer a question, make a note of it and tell your colleague you will get back to them. Contact your ECC to obtain a response.

Invite your colleagues to participate

- Share the dates and times of all campaign activities and events, and encourage your colleagues to support the campaign by attending
- Don't forget to participate and have fun!

Say thank you!

- It is important to thank everyone - even those who choose not to donate. Thank people for both their time and participation.
- Remember that the impression you leave is the one people will remember when they think of United Way and your workplace campaign.

3 Steps to Successful Campaigning

Follow Up

After your canvassing meeting, it is best to follow up by email to:

- Answer people's questions
- Reschedule with anyone who was away or unavailable
- Touch base with anyone who has not made a decision
- Thank everyone on your list

Once you have canvassed and followed up with the people on your assigned list, report results and any feedback to your ECC.

In some campaigns (or in specific areas and departments) there may be a need to recanvass after the initial approach has been made. Your ECC will provide guidance on this strategy.

Tips

The number one reason people don't give is because they were never asked – be sure to ask everyone assigned to you.

Don't take things personally. If someone says "no," try to determine why and address their objection.

Be yourself! Your enthusiasm and commitment will motivate others to give.

Be fearless! You are not asking for yourself – you are asking for the community.



Donor Impact Examples

By giving to United Way Simcoe Muskoka, you can be assured your dollars are having an impact on the lives of many. Here are just some examples of the impact donors have made on Simcoe Muskoka residents:

\$52 Can provide a subsidized rec centre pass for 24 youth for one month, giving them access to a safe environment and programs.

\$100 Can provide clothing, winter boots and on-the-go meals for someone experiencing homelessness.

\$250 Can purchase a bed for a single parent and their child who are currently sleeping on a piece of foam on the floor.

\$365 Can enable an isolated senior resident to get to and from medical appointments for five months.

\$500 Can provide food for two families of four who have exhausted food banks and are waiting on disability payments.

Tax Benefits

Tax benefits make giving to United Way even more attractive.

An individual who makes a gift to United Way receives a federal tax credit against income taxes. The annual federal tax credit is equal to 15 percent of the first \$200 donated by an individual and 29 percent of the amount exceeding \$200.

Donating publicly traded securities

The Capital Gains Tax was removed from publicly traded shares that have been donated. This means that the donor receives a tax receipt for the full value of the shares but is not taxed on any gain. A minimum of \$1,200 of the total gift must remain with United Way Simcoe Muskoka, United service area or another United Way in Canada.

The benefits are clear...

If you sell a security, you pay tax on 50 percent of the capital gain. However, when you donate a Gift of Security to United Way the taxable capital gain is eliminated.

You will also receive a tax receipt for the full market value of the security in the amount of the closing trading price on the day United Way received the security

This multiplies the impact of the tax benefit of your charitable giving.

To make a Gift of Securities or for more information, please call (705) 726-2301.

Gift amount*	Total tax savings	Actual cost to you
\$100	\$20	\$80
\$200	\$40	\$160
\$500	\$160	\$340
\$1,000	\$361	\$639
\$5,000	\$1,968	\$3,032

*Taxable income less than \$208,000

Example: Tax benefit of donating publicly traded gifts of securities to United Way Simcoe Muskoka		
	Sell securities and donate after-tax proceeds	Donate securities through UWSM
Current Market Value	\$10,000	\$10,000
Cost of Security	\$5,000	\$5,000
Capital Gain	\$5,000	\$5,000
Taxable capital gain (50%)	\$2,500	\$0
Tax due on gain at Marginal Rate (e.g., 43%)	\$1,085	\$0
Tax receipt amount	\$8,915	\$10,000
Total Tax credit*	\$3,869	\$4,340
Net Tax Savings	\$2,784	\$4,340

Examples use Federal and Provincial combined tax rate, assuming Ontario residency.

Sample Emails



Arrange a canvassing meeting

Hi! I am setting aside some time for us to talk about [organization's name]'s United Way campaign and tell you about some of the exciting things we have planned for the week of [date].

Did you know:

- Last year we raised [\$30,000] from personal contributions
- [98%] of staff participated in the campaign

Our goal this year is to raise [\$40,000] with [100%] participation. I am confident we can achieve this goal with your help.

Before we meet, I encourage you to learn more about how United Way is making a difference in our community by visiting uwsimcoemusokoka.ca. This website offers personal stories, information on vital services offered by United Way agencies and long-term strategies to build a stronger and healthier community for everyone.

I look forward to meeting with you soon and answering any questions you may have at that time.

Your United Way Ambassador

[Name]



Thank you (ideally sent after canvassing someone)

Dear [name]

On behalf of [organization's name]'s United Way campaign team, thank you for your time today.

A donation made directly to United Way Simcoe Muskoka represents an important contribution to our organization's corporate social responsibility efforts. But more importantly, it will help United Way sustain a vital social safety net that provides thousands of people – our friends, neighbours, and family – with much needed support year-round.

When we come together, we can make a difference. That is the power of community.

Thank you!

Your United Way Ambassador

[Name]

Donor Rights and Privacy

What you need to know as a workplace volunteer

Every year, thousands of people from across Simcoe County and the District of Muskoka join United Way's campaign to fight local poverty and build a better future. We deeply value the trust placed in us by our donors and the communities we serve. We work hard to ensure that trust is well-founded.

We adhere to strict policies that guide how we fundraise and how we protect the privacy of individuals and organizations and we thank you in advance for your cooperation in adhering to United Way Simcoe Muskoka's fundraising and privacy practises.

How you handle employee campaign information will be determined by your organization's current practices and policies. Your organization may already have clear rules about confidential information related to the campaign. If you have a question or concern about privacy, please contact your Human Resources Department.

Volunteer practices for donor solicitation

Protecting donor rights and privacy has always been a key priority for United Way. All individuals making a donation on our behalf must adhere to the following practices in accordance with our fundraising policies.

- Disclose that they are volunteers with United Way when making solicitations on behalf of United Way.
- Make every effort to respect donors/prospective donors when making solicitations and honour their requests for information and/or limit or discontinue solicitations when unwanted.
- Ensure that fundraising solicitations made on United Way's behalf are truthful and accurately describe United Way's activities and intended use of funds.
- Act with fairness, integrity and in accordance with all applicable laws.
- Immediately disclose to United Way any apparent or actual conflict of interest.
- Do not accept donations that are inconsistent with United Way's mission.
- Disclose how United Way benefits from the sale of products or services in any third-party fundraising arrangements. For example, if your workplace campaign is hosting an employee book sale to raise funds for the campaign, you must clearly articulate the amount of proceeds that go to United Way (i.e. for every \$20.00 book sold, \$5.00 will go to United Way).

Our Mission

To improve lives and build communities by leveraging collective resources and mobilizing collective action to achieve the greatest impact.

Everyone in Simcoe Muskoka deserves a chance to lead a good life. This conviction drives thousands of dedicated donors, volunteers and community partners to come together through United Way Simcoe Muskoka to generate the caring power to advance measurable, lasting change in our region – for today’s residents and for generations to come.

When we work together on important community issues, the results are game-changing.



We're creating pathways to prosperity

Poverty touches most aspects of a person’s life from food, shelter, and employment, to mental and physical well-being. This complex issue has a social and economic impact that affects entire communities and everyone who lives there.

It’s not somebody else’s problem. Community challenges belong to all of us. Together, we need to take action and address local poverty head-on.

How can we create a lasting difference in our region? By unleashing our local love – one generous act at a time. Your donation powers UWSM’s crucial work, allowing us to target funds and mobilize on-the-ground efforts to tackle persistent social issues where they start.