

# **UNITED WAY NIAGARA Campaign Coordinator & Ambassador Guide**

How To Canvass  
Your Colleagues



**United Way**  
**Niagara**

# WHAT WE DO



United Way works to tackle some of the biggest social issues in Niagara by investing in programs that provide solutions to issues such as food insecurity, poverty, homelessness, mental illness, social isolation, domestic violence, and disadvantaged children and youth.



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# Role of the Campaign Coordinator(s)

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 the resources and supports they need to thrive.

Employee Campaign Coordinators (ECC) are key to the success of every campaign. You are the frontline volunteers who approach your peers in the workplace to raise awareness about United Way's vital role in the community.

Whether working remotely or in-person, ECC's 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 that United Way Niagara brings to our community, Explain how a single donation to United Way Niagara means you are helping 103 local organizations to create hope and possibility for over 130,000 people living in our community. No other single agency impacts as many lives in Niagara.

## ASK

- Ask your colleagues if they would like to support the most vulnerable people in Niagara by donating to United Way.
- Ask your colleagues if they have any questions they need answered before being able to decide about their charitable giving.
- Follow up 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.
- Share an impact story of how donations have helped! Reach out to your United Way staff partner to provide you with a story.

# THREE STEPS TO SUCCESSFUL CANVASSING

1 - PREPARE

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2 - CANVASS

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3 - FOLLOW UP

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## 1 - PREPARE

### Learn about United Way's work in our community

- Attend United Way's ECC training.
- Visit <https://www.unitedwayniagara.org/> to find out how donations make a difference, learn about community issues and read about United Way Niagara's impact on local people's lives.
- Watch a United Way video or listen to a United Way 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's campaign 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, virtual meetings (about 15 minutes each) to meet one-on-one with everyone on your canvassing list.
- Consider including links to United Way videos that your colleagues can review before your meeting.

## 2 - CANVASS

### Set the tone

- When canvassing virtually, keep your cameras on so you can speak face-to-face. If video conferencing isn't available, consider connecting over the phone.
- 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, your workplace campaign, and to ask for a donation.



# THREE STEPS TO SUCCESSFUL CANVASSING

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**State Your Case - customize your ask by leveraging one or more of the following.**

## **Provide information about United Way's work in the community**

***Explain the impact of the work that United Way is doing in our community.***

- A donation made directly to United Way is used to support a vital social safety net of over 100 community and grant-funded agencies making a difference every single day, during times of stability and times of crisis.
- United Way brings together local government, business leaders and agencies at community tables so they can co-ordinate efforts and work efficiently and effectively to fill gaps in services across our region.
- In one-year, United Way delivered services to 131,883 individuals and families most in need, across Niagara.
- Visit <https://www.unitedwayniagara.org/> to learn more about investment in our community.

## **Promote the Benefits of Giving**

- Promote early bird prizes or other incentives to encourage potential donors to decide sooner, rather than later (i.e. sign up for payroll deduction by this date and win a gift card to Homesense). Ensure you have approval from your workplace to get gift cards and prizes for your campaign.
- Talk about how their donation will leverage your organization's corporate match (if applicable) or a United Way matching opportunity - <https://www.unitedwayniagara.org/get-involved/donate/>.
- Explain the Tax Benefits of Giving.

## **Ask your colleagues to support the community by donating directly to United Way.**

- 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 to sustain a vital social safety net of 103 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 they might have.
- Listen carefully to any concerns. You will probably be able to respond to most concerns by referring to the Frequently Asked Questions available on the United Way Niagara website at <https://www.unitedwayniagara.org/community-investment/#faq>
- If you are unable to answer a question, make a note of it and tell your colleague that you will get back to them. Contact your United Way staff partner.



# THREE STEPS TO SUCCESSFUL CANVASSING

1 - PREPARE

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2 - CANVASS

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3 - FOLLOW UP

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## 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 their time as well as their participation.
- Remember that the impression you leave is the one people will remember when they think of United Way and your workplace campaign.

## 3 - FOLLOW UP

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

- With answers to people's questions.
- With anyone who was away or unavailable.
- With people who have not made a decision.
- To thank everyone on your list.

If you are working with multiple canvassers on a committee, ensure they are tracking their follow ups and report results and any feedback to the main campaign coordinator.

In some campaigns (or in specific areas and departments) there may be a need to recanvass after the initial approach has been made.

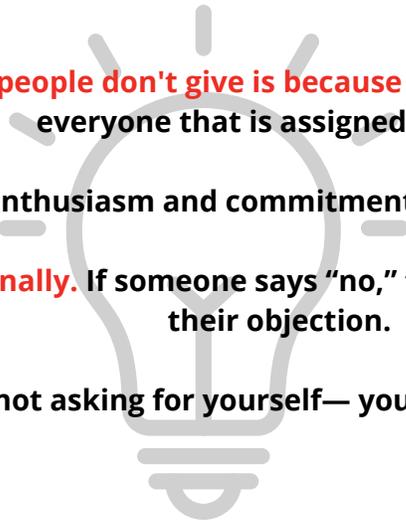
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**The number one reason people don't give is because they weren't asked - be sure to ask everyone that is assigned to you.**

**Be yourself - your enthusiasm and commitment will motivate others to give.**

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

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





# Your Dollars Count For So Much



**\$52**

provides 4 newcomers with the support they need in their first days in Canada.

**\$365**

provides 38 seniors with a nutritious meal delivered to home.

**\$500**

provides 12 youth with literacy tutoring.

**\$1,200**

provides 7 nights in an emergency shelter for one person or family experiencing domestic violence.

**\$2,500**

provides 16 sessions of walk-in counselling to people struggling with mental illness.

**\$5,000**

provides 35 individuals with disabilities with the skills to improve personal safety, well-being, coping skills and independence for 6 months.



# The Tax Benefits

## Tax benefits make giving to United Way even more attractive.

When a donor makes a gift to United Way they will receive a Federal and Provincial tax-credit against income taxes\*. The Federal charitable tax-credit is 15% for the first \$200 donated and 29% on the amount over \$200 and the Provincial tax- credit in Ontario is 5.05% on the first \$200 and 11.16% for amounts over \$200. The Federal charitable tax-credit is 33% for amounts over \$200 where the individual has taxable income at the 33% personal income tax rate.

\*Taxable income less than \$214,368

Gift Amount	Tax Savings	Cost to You
\$100	\$20	\$80
\$200	\$40	\$160
\$500	\$160	\$340
\$1,000	\$361	\$639
\$5,000	\$1,968	\$3,032

## Donating Publicly Traded Securities

When you donate publicly listed securities, the tax on Capital Gains will be eliminated PLUS you receive a donation tax credit for the donation. This means that the donor receives a tax receipt for the full value of the shares and is not taxed on any capital gain. A minimum of \$1,200 of the total gift must remain with United Way Niagara, United Way service area or other United Ways in Canada.

## The Benefits Are Clear

If you sell a security, 50 % of the value of the Capital Gains are taxable. However, when you donate a Gift of Security to United Way Niagara, the taxable Capital Gain is completely 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 Niagara received the security.

**This multiplies the impact of the tax benefit of your charitable giving —securities are the most efficient ways of donating.**

## Example: Tax benefit of donating publicly traded gifts of securities to United Way Niagara.

	Sell securities and donate after-tax proceeds	Donate securities through UWN
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 Ontario Federal and Provincial combined tax rate. This graph estimates the amount of the non-refundable tax credit you will receive for monetary donations to registered Canadian charities claimed on your 2021 income tax return based on your province or territory of residence and sum of donations in the 2021 tax year. It does not consider all possible tax situations and you should seek professional guidance from a tax professional.



# Sample Email Messages

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## Arrange a canvassing meeting

Hi [name of colleague],

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 [x amount] from personal contributions
- [98%] of staff participated in the campaign

Our goal this year is to raise [x amount] 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 [www.unitedwayniagara.org](http://www.unitedwayniagara.org). This website offers information on vital services offered by United Way 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 Coordinator/Ambassador,  
[name]



# Sample Email Messages

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Thank people for their time!

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 Niagara 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 hundreds of thousands of people—our friends, neighbours, and family—with much-needed support, year-round.

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

Thank you.

Your United Way Campaign Coordinator,  
[name]



# Sample Email Messages

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## Remind colleagues about your campaign!

To: All Staff

Subject: REMINDER United Way Campaign

Let's not go back to *normal*. Let's do better!

On **DATE**, we kicked off (Company's Name) 2021 United Way Campaign. We are hoping to wrap up our campaign on **DATE**. If you have already made a gift, please accept our sincere thanks. We don't want you to miss out on the opportunity to help over 120,000 people in our community!

### WHY

Vulnerable people in our community simply do not have the same capacity to cope with and recover from the devastating impacts of COVID-19, as those with access to greater resources and stability. Many struggle with multiple issues and need multiple supports.

### HOW

United Way Niagara invests in all municipalities in the Niagara region, funding local agencies on the front line who need our help to respond to the most pressing social issues, and by ensuring people have access to the help they need, when and where they need it.

As we move from response to recovery, we know that the vital social safety net that United Way provides is needed now more than ever. We also know that demands and challenges faced by United Way's partner agencies are at an all-time high. Last year, 131,883 people in Niagara accessed a United Way funded program and your support is vital to ensuring these programs have the resources they need to handle future demand.

Thanks to the generosity of United Way's match sponsors, there are two different matching programs to increase the impact of your gift. The matches apply to new donors, and leadership donors.

If you can, please give now. Please consider making a gift today, your community needs you.

### SHARE MATERIALS

I have attached more information for your consideration...

Additional materials have been uploaded to our intranet portal...

You can make your donation via the personal link sent to your email...

Please fill out the attached pledge form with your donation and return to me...

If you have any questions let me know.

Gratefully,

Your United Way Campaign Coordinator, **NAME**

# PROTECTING DONOR RIGHTS & PRIVACY

WHAT YOU NEED TO KNOW

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VOLUNTEER PRACTICES FOR  
DONOR SOLICITATIONS

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## WHAT YOU NEED TO KNOW AS A WORKPLACE VOLUNTEER

Every year, thousands of people from across the Niagara Region 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 support.

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 SOLICITATIONS

Protecting donor rights and privacy has always been a key priority for United Way. All individuals making solicitations on our behalf must adhere to the following practices:

- Disclose that they are volunteers with United Way when making solicitations on United Way's behalf.
  - 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, and integrity.
  - Immediately disclose to United Way any apparent or actual conflict of interest.
  - 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 book sold, \$5 will go to United Way).
  - For more information - take a look at The Donor Bill of Rights: <https://afpglobal.org/donor-bill-rights>
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# OUR MISSION

**United Way Niagara** works to improve lives and build community by engaging individuals and mobilizing collective action.

# OUR COMMITMENT TO YOU

Each year, United Way's efforts to build a better community are supported by thousands of people across the region. We deeply value the trust you place in us. We work to ensure your gift to United Way is making a difference in our community. Your investment supports local programs and initiatives that help people and families—both today and in the future.

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