



# 2023 UNITED WAY WORKPLACE CAMPAIGN: VOLUNTEER AMBASSADOR TOOLKIT

## Table of Contents

Introduction .....	2
Volunteer Guide.....	2
Our 2023 Campaign Goal:.....	3
Contact Us:.....	3
Timeline: .....	3
Resources Available: .....	3
United Way Campaign Ambassador Tips & Tricks .....	6
How to make your campaign a success!.....	6
2023 United Way Key Events .....	9
Event Regulations .....	9
Charity Ticket Sales .....	9
Lottery Style Event .....	10
Food Safety .....	10
Money Handling Guidelines.....	10
Frequently Asked Questions .....	11
Thank You.....	12



## Introduction

Hello 2023 United Way Ambassadors,

Welcome to the Ambassador team for UWaterloo’s 2023 United Way Workplace Campaign! On behalf of the core committee team, we thank you for signing on to volunteer your time and skills toward our United Way campaign. We are very fortunate to have ambassadors across campus who dedicate their time planning activities and events within their departments to fundraise for our community, which needs us now more than ever. We would not be able to do this without you!

The United Way supports and invests in issues that impact the wellbeing of our whole community. However, they target 3 key focus areas which address the most pressing issues in Waterloo Region right now: **food insecurity, housing and homelessness, and mental health and addictions**. Funds raised during our campaign support local organizations to improve access to support services while expanding our community’s awareness of the issues they address.

My role as this year’s Campaign Coordinator was not my first introduction to the United Way. Through previous work experiences and volunteer positions over the past several years, I have had the privilege of seeing firsthand the amazing work the United Way does in the community. It is an honor to contribute alongside all the dedicated volunteers and supporters. I am delighted to be able to help you support the United Way in your own way as an Ambassador.

Understanding and helping others has always been a passion of mine, which is why working in this role has been a rewarding experience. During this co-op term, I had the opportunity to learn more about how the United Way utilizes their resources to help others. I have come to understand and appreciate the necessity of the United Way’s efforts in identifying and catering to the most urgent needs in our local community. Moreover, since starting this position, I have come to realize how vital the work of dedicated volunteers, like yourselves, is to run a campaign. Without your hard work and enthusiasm, we would not be able to make it this far, surpass our goals each year, and help our community grow.

Throughout this campaign, please feel free to contact me with any questions, concerns, or if you need support. I would be happy to help you in any way that I can! On behalf of the core committee, we are delighted to have you join our team and we truly appreciate you. Let’s make this the best campaign yet!

Sincerely,

Kate

## Volunteer Guide

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### Our 2023 Campaign Goal:

- Last year we did not communicate a financial goal due to the pandemic but were still able to raise over \$2250,000 thanks to dedicated volunteers like you!
- While we will not communicate a financial goal this year either, we will further aim to **increase engagement and participation**. The continued impact of the pandemic on our vulnerable population and our community is significant and we will need strong engagement to help our community recover.

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### Contact Us:

Our Campaign Coordinator Kate is happy to answer any questions and to assist you with anything you might need. You can contact her by e-mail or phone:

MC 2010  
519-888-4567 ext. 43840  
[united.way@uwaterloo.ca](mailto:united.way@uwaterloo.ca)

For updates on the campaign's progress, to see photos, or for information on events, please check out our website throughout the campaign at: [www.unitedway.uwaterloo.ca](http://www.unitedway.uwaterloo.ca).

### Timeline:

The campaign runs from **October 1<sup>st</sup> – October 31<sup>st</sup>**. You will receive an email to your @uwaterloo.ca account in late September-early October inviting you to register and to make a donation on our online ePledge system. If you used ePledge last year, you can renew your donation using your ePledge login information. If you prefer sending your donation using the 2023 paper pledge form, you can find it on our website at: <https://uwaterloo.ca/united-way/how-donate>

If you are planning events to raise money in your department, please organize them for the month of October. Please include Kate ([united.way@uwaterloo.ca](mailto:united.way@uwaterloo.ca)) on your emails when informing your department of an event. This will allow her to post the events on our website and to support you with resources and advertising.

### Resources Available:

- A Virtual/Live Presentation from United Way WRC
  - This year, you can request a virtual presentation anytime from United Way WRC themselves! This is a fantastic resource to utilize during department meetings, for you and your team to learn about what the United Way does and why it matters.

- To schedule this presentation, email **Krista Porter** in Donor Relations at United Way ([kporter@uwaywrc.ca](mailto:kporter@uwaywrc.ca)) and CC Kate ([united.way@uwaterloo.ca](mailto:united.way@uwaterloo.ca)).
- [United Way Virtual Campaign Toolkit](#)
  - United Way WRC created a virtual campaign toolkit, which includes everything you need to run a successful campaign, whether you are working at the office or remotely. This link will also provide you with virtual event guides for social events, health & wellness events, awareness raising events, kick-off presentations, impact videos and more!
- [2022 Campaign Video](#)
  - This is a short, 3-minute video you can share with your colleagues to explain the importance of United Way to our community. Or check out other fantastic videos that are available for viewing and sharing [here](#).
- [United Way Logos and Posters](#)
  - On the United Way WRC website, you will find logos you can use if you are creating your own campaign materials. Be sure to also check our own [brand guidelines](#). If you have any questions, please contact Kate. Here is an example:

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- You will also find campaign posters you can help to raise awareness for your events. The posters are designed as 8.5x11 PDF's. You can print them if you are in a shared workplace, but you can also share them digitally. Here is an example:

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- [Frequently Asked Questions](#)

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- With the pandemic there has been lots of uncertainty and questions about the campaign. This PDF document will answer the most frequently asked questions regarding the United Way Campaign during COVID-19. Learn more about United Way's policies, administrative information and how to engage donors!
- [Who United Way Funds and the Investment Strategy](#)
  - Learn more about who United Way funds as part of several community-wide initiatives, investments, and partnerships. You can use this information when promoting events and providing awareness to your colleagues.
- [Community Impact](#)
  - This document is a great source of information to send colleagues and to raise awareness about the significant impact the United Way has on our community.
- [UWWRC Campaign Resource Library](#) ([Resource Library](#))
  - This website has a variety of digital tools and resources that you can use to help promote the campaign. Resources include:
    - UWWRC logos
    - Information on the cause areas
    - ePledge materials
    - Event ideas
    - And more!

Some resources that can be obtained by contacting Kate include:

- Spreadsheet to track donations
- Support for event planning
- Participation Rate for your Department
- More information on United Way
- Visibility on our website: Include Event Updates and Information from across Campus

Some resources available through the website include: the latest campaign progress, upcoming events, event ideas, and much more! See also the United Way Waterloo Region Communities website at <http://www.uwaywrc.ca/> for more things to fill your toolkit!

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## United Way Campaign Ambassador Tips & Tricks

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We understand that we are running this campaign under extraordinary circumstances that make it difficult to run the fundraising events you are used to. We are here to support you.

**If this is your first Campaign, we recommend booking a virtual or in-person training session by emailing [united.way@uwaterloo.ca](mailto:united.way@uwaterloo.ca).** Once you feel prepared, you may begin to support the campaign by sharing information about why our United Way campaign is important to the community. You will receive newsletters, stories, posts on the Daily Bulletin to update you on our events and expectations. You will also share campus-wide initiatives such as Go Red Day with your colleagues so they can donate and participate to help us reach our goals. We will provide you with newsletters every few weeks, and we have included a new page on our website titled "[Campaign in the News](#)". This is where we will provide updates on any communications, events, and initiatives that we post on the Daily Bulletin for your convenience. Be sure to also check-out our "[Events](#)" page for details and registrations of specific events.

**Anything creative that you would like to do beyond this is a bonus.** Let us know what creative ideas you come up with and if there is anything we can do to help.

### How to make your campaign a success!

#### Learning & Information Sharing

Continue to refer back to this document as needed! This will help you understand the impact of United Way in our region as well as your roles and responsibilities as an Ambassador. We are also offering 1-1 or group meetings with a member of our Volunteer Committee this year. These are a great opportunity to have any questions answered, brainstorm ideas, or learn more about the campaign. Please let Kate know if you would like to book some time (in-person or virtually). Our Teams channel is another great way to stay connected and brainstorm ideas with your Ambassador teammates. Please let Kate know if you are not in the channel.

#### Confirm Department Chair/Manager Support

The support and commitment of your department chair/manager is critical to the success of your work. Their endorsement and participation sets a good example for others in your organization and their enthusiasm can be contagious! Ask them to provide visible support and leadership for the campaign events you run.

Examples of how they can get involved include:

- Ask them how they would like to get involved – they might have some great ideas!
- Sending a personal letter to each employee endorsing the United Way campaign and encouraging people to donate. A "Welcome to our 2023 campaign" letter from your department chair/manager can help set the tone for the campaign



**United Way**  
Waterloo Region  
Communities



**UNIVERSITY OF  
WATERLOO**

- Approving the time necessary to plan and implement campaign events and activities (i.e. meetings, trainings, and events)
- Supporting your department goals, objectives, and plans, or participating in fun special events
- Provide time at a team meeting to share the United Way UWaterloo's key messages. Remember, you can invite United Way to do a mini presentation, email Krista at: [kporter@uwaywrc.ca](mailto:kporter@uwaywrc.ca)

### **Recruit Others to Help You**

The size and shape of your area's United Way committee will vary depending on the size of your department. If it fulfills the following requirements, it is the best committee for you!

- Accurately reflects the structure of your department
- Each committee member has a specific role to play
- Committee members are United Way Waterloo Region Communities supporters and/or donors
- Committee members are enthusiastic about sharing the United Way Waterloo Region Communities message

### **Set a Goal**

Possible Goals for your Department include:

- Increasing the participation and donation rate
- Do one new thing (i.e. connect with Kate at [united.way@uwaterloo.ca](mailto:united.way@uwaterloo.ca), try a new idea for an event, or plan a special thank you message)

### **Promote Your Department's Campaign Activities**

Publicity and promotion builds spirit and adds to the fun of the campus campaign. Use a variety of approaches to give employees opportunities to learn about United Way WRC. Varied virtual promotional materials such as posters, progress thermometers on meeting agendas, and updates during Teams meetings.

*Successful Activities to Engage Co-Workers Include:*

- Participate in our campaign launch on **October 2<sup>nd</sup>** – UWaterloo Goes Red for United Way
- E-mail impact videos, banners, flyers, and goal thermometers to your department
- Promote and attend our Campus-wide Events
- Display United Way WRC's posters to share how contributions are improving lives in our community
- See a full list of virtual event ideas compiled by United Way WRC in their toolkit



### **Organize a Kick-off and Finale**

The UWaterloo United Way Campaign kicks off on **October 1<sup>st</sup>** and finishes on **October 31<sup>st</sup>**. You can build on these dates within your department with tailored kick-off and finale events or unique initiatives to mark the timeframe of the campaign.

### **Evaluate Your Work**

It is helpful to analyze and evaluate all aspects of what you did for this year's campaign. The analysis can be an important planning tool for the future. Review your results and compare them to your original goals. Recommendations will be valuable in planning next year's approach.

### **Report Back Your Results**

Once your event is complete, please contact Kate at [united.way@uwaterloo.ca](mailto:united.way@uwaterloo.ca) to arrange a time and location to exchange donations raised. She will count the money with you present and you will sign a special event sheet, indicating the correct amount of donations received. Please try to do this after every event occurs. For staff who are not coming to campus, Kate will make appropriate arrangements with you.

### **Recognize and Thank Your Team**

Be sure to celebrate your success and the success of the overall campaign and say "thank you" to everyone who helped make it a great campaign.



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## 2023 United Way Key Events

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As a core committee, these are the key events for visibility and fundraising we're running for all staff, faculty and students. Please share this with your colleagues, to maximize our profits, reach our goal and increase engagement!

### 1) *Go Red Day* (October 2)

On **October 2<sup>nd</sup>** our campus is "going red". We'll be raising awareness about the campaign and reminding everybody that the campaign has launched virtually. There are several ways for you and your area to be involved:

- Decorate your own workplace red (home office or office on campus)
- Wear red on **October 2<sup>nd</sup>**
- Share pictures of your red decorations and outfits on social media
- Change your email signatures to promote Go Red Day (Kate can provide you with a PNG file to upload to your email signature)



The following core events will focus on the three focus areas of the United Way WRC. [See their website for more details](#). Each event will be offered free of charge; however, we do encourage attendees to make a donation through e-Pledge.

### *Houseplants 102* (October 12)

This event is inspired by United Way WRC's focus area of social isolation. We have partnered with local *Gold Leaf Botanicals* to provide a lunch and learn on plant care and all things houseplants. Please promote this event and encourage giving.

### *Soup Day* (October 16)

This event is inspired both by United Way WRC's focus area of meeting basic needs such as food and shelter. In collaboration with our university's own Food Services, we will provide soup for \$5/cup. Please promote this event and encourage giving.

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## Event Regulations

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### Charity Ticket Sales

Pricing on ticket sales can be mandatory, but if you are charging a fee for tickets/admissions, then you **must charge HST on the price of the ticket/admission**. If you want to avoid



HST, then admission by donation is completely acceptable; however, it cannot be mandatory. Donations need to be of free volition.

### Lottery Style Event

A lottery style event means there is some sort of lottery scheme. Due to University's Guidelines and money handling policies, we are **unable to execute a lottery style event**. A lottery scheme may be defined as any scheme that has all three of the following components:

- A prize;
- A chance (to win a prize) at random; and
- Consideration for a fee

Examples of lottery style events would include any event that an individual would pay to be involved in for a chance to win a prize: BINGO, 50/50 draws, ballots sold for prize draws, sports pools, stub draw, etc. If you are ever questioning whether an event is lottery style, just ask yourself these questions:

- Do participants have to pay to enter? AND
- Do participants have a chance to win a prize at random?

If you answer yes to both questions, then you've got yourself a lottery style fundraiser/event. We encourage volunteers to look for other means of rewarding and/or engaging participants.

### Food Safety

Food safety is a very important factor to take into consideration when planning for food related events or fundraising activities. If you are holding a great event that includes food, it is important that you review the information found online: <https://uwaterloo.ca/united-way/volunteer/volunteer-toolkit/event-food-safety>

### Money Handling Guidelines

Due to COVID-19, how we accept donations has changed, since many of us are now working from home. To learn more about the University's policies and how to accept fundraising/event activity donations, please check out the "Money Handling Guidelines" document on our [website](#).

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## Frequently Asked Questions

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- Here are some more questions we received from previous campaigns. If you have any questions that are not listed in the PDF provided earlier or here, please email [united.way@uwaterloo.ca](mailto:united.way@uwaterloo.ca)

### **1. What is United Way Waterloo Region Communities (WRC)?**

United Way Waterloo Region Communities is committed to making positive, long-term change happen – sustainable change that targets the root of issues so we can all share in our community’s success. Funds given through United Way are invested right here in our community where you live, work, learn and play. We work with and through local social service programs and initiatives across the **3 focus areas** with the goal of ensuring a strong social support network. That means every effort brings as much impact as possible to the community.

### **2. I already give to my favourite charity, so why should I give to United Way WRC?**

Faith, education, healthcare, sports and culture play very important roles in our community. Many donors also include United Way in their giving to ensure that basic and secondary needs-including food, shelter, literacy and mental health support - are available to all citizens. United Way WRC is also investing in the future of the community through prevention programs. By donating to United Way WRC your gift supports a strong social support network of services in our community and long-term, sustainable change. It takes more than one organization to make that change.

### **3. I have never used a program or service supported by United Way WRC, so why should I give now?**

United Way WRC relies on your support to ensure that community services are in place should you, a loved one, a neighbor or a co-worker ever need them. They also move people from poverty to possibly. If you review the list of supported programs and initiatives, you may find that you are connected to one of them. The lists are broken down by focus area:

<https://www.uwaywrc.ca/what-we-do/focus-areas/>

- [Basic Needs](#)
- [Mental Health](#)
- [Social Isolation](#)

### **4. Will my donation stay within my community?**

Yes. Unless you designate your gift to another United Way outside of Waterloo Region or to another national charitable organization, your donation will remain in Waterloo Region and will fund community’s programs and initiatives.

### **5. How does United Way WRC raise funds?**

The fall workplace campaign continues to be the single largest – and most publicly recognized – method of fundraising, but it is not the only method. United Way engages donors year-round through other fundraising practices such as direct mail campaigns, special events, and



sponsorships. They work diligently to diversify sources of revenue even further to expand your impact on community issues.

**6. How much of my contribution goes to pay administration costs?**

Of every dollar, over 75 cents go directly into community. United Way is proud that their fundraising and administration costs are well below the 35% threshold recognized by the Canada Revenue Agency (CRA). For the fiscal year 2020-2021 United Way Waterloo Region Communities' fundraising fees were 10.7%. Administrative fees were 8.2%

**7. Why should I give if I don't support "X"?**

All programs and initiatives United Way funds meet high standards of service and operation. They depend on each other to form a strong network to support all community issues. All applications for funding are thoroughly reviewed by Community Impact Teams, made up of community volunteers just like you. The rigorous and transparent review process ensures that all funds are invested where they will make the most impact in our community. Making positive changes to complex issues cannot be done by one agency alone.

**8. How carefully are the expenditures of supported programs and initiatives reviewed?**

Each year, volunteers from various backgrounds in the community work together on the Community Impact Teams. After significant training - and using stringent guidelines - these teams review the funding applications of each program and initiative, while a team of financial professionals reviews the financials of each program and initiative. Funding recommendations are then made and approved.

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## Thank You

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Thank you for volunteering your time and effort as an ambassador for the United Way campaign. Your efforts are greatly appreciated by all those in need across Waterloo region, and we would not be able to support our community without you. Once again, if you have any questions or concerns, please contact our Campaign Coordinator, Kate.

We wish you all the best and have a great campaign!