

AMBASSADOR GUIDE



United Way
Greater Toronto

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OUR MISSION

United Way Greater Toronto works to meet urgent human needs and improve social conditions by mobilizing the community's volunteer and financial resources in a common cause of caring.



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 about 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 community, like how a donation to United Way sustains a vital social safety net that provides hundreds of 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 your 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 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 the resources and supports they need to thrive.

THREE STEPS TO SUCCESSFUL CANVASSING

There are three steps to successful canvassing:

- 1 Prepare**
- 2 Canvass**
- 3 Follow up**

1 Prepare

Learn about United Way's work in our community

- Attend a virtual training session offered by your workplace.
- Visit unitedwaytgt.org to find out how donations make a difference, learn about community issues and read stories of people who received help from a United Way agency or initiative.
- 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 or stories that your colleagues can review before your meeting
- If you encounter a problem or are denied a meeting, advise your Ambassador Coordinator or your ECC.

THREE STEPS TO SUCCESSFUL CANVASSING

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.
- **Say:** *"If you've 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, when COVID-19 struck our region, \$1.9 million was invested in rapid response emergency funding in the first few months of the crisis, allowing agencies to respond to their community's most urgent needs, like food access, support for seniors and mental health counselling."*
- Explain your own personal reasons for supporting United Way (i.e., have you or someone you know used United Way services?). Talk about an issue you feel strongly about or discuss a certain program or agency that you have researched.
- Outline the key facts about your organization's campaign (i.e., past achievement, your campaign goal, average giving amount, participation, etc.).

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 280+ diverse 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 2.9 million services to people across Peel, Toronto and York Region to individuals and families most in need.
- Visit unitedwaygt.org to learn more about investment in our community.

THREE STEPS TO SUCCESSFUL CANVASSING

Promote the benefits of giving

- Promote earlybird 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 on page 7.

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 280+ 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 toolkit at unitedwaygt.org
- 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 Ambassador Coordinator or 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 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.

THREE STEPS TO SUCCESSFUL CANVASSING

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.

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



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

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

\$100

provides a frost prevention kit for four homeless people, including a scarf, toque, gloves and pocket warmers.

\$250

provides 75 transit tickets to assist low income clients with mental health issues to travel to/from individual counselling or group support program.

\$500

provides five children with nutritious after-school snack while they participate in weekly programming for 12 weeks.

\$1,000

provides ingredients for one six-week community kitchen program, supporting 150 youth in learning to prepare healthy meals.

\$2,000

provides four single moms with a career training course so they can get jobs and support for their families.

\$2,400

provides ten individuals with the support they need to find housing and stay housed for three months.

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.

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 \$202,800

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 Greater Toronto, United Way service area or other 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 Greater Toronto 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 Greater Toronto received the security.

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



Example: Tax benefit of donating publicly traded gifts of securities to United Way Greater Toronto

	1. Sell securities and donate after-tax proceeds	2. Donate securities through UWGT
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

**Making a Gift of Securities
is as easy as calling 416-777-2001**



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 [\$120,000] from personal contributions
- [98%] of staff participated in the campaign

Our goal this year is to raise [\$130,000] 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 unitedwaygt.org. 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 Greater Toronto 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 Ambassador [name]

What you need to know as a workplace volunteer

Every year, thousands of people from across Peel, Toronto & York 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 and cooperation in adhering to United Way Greater Toronto's [fundraising](#) and [privacy](#) practices.

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 in accordance with our Fundraising policy:

- 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, 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 book sold, \$5 will go to United Way).



You can learn more about our commitment to donors, our [Code of Conduct and Ethics](#) and other policies and practices that guide our work on our website at unitedwaygt.org

OUR MISSION

United Way Greater Toronto works to meet urgent human needs and improve social conditions by mobilizing the community's volunteer and financial resources in a common cause of caring.

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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