

SHOW YOUR
LOCAL LOVE
OXFORD COUNTY

Employee Campaign Coordinator Toolkit



United Way

Oxford

unitedwayoxford.ca

Welcome to the Team

Welcome! We are so happy to have you be a part of our team! **Thank you** for leading your organization's efforts to help create a brighter future for people in Oxford County. Your hardwork, commitment and drive will motivate many. You will be a rock star!

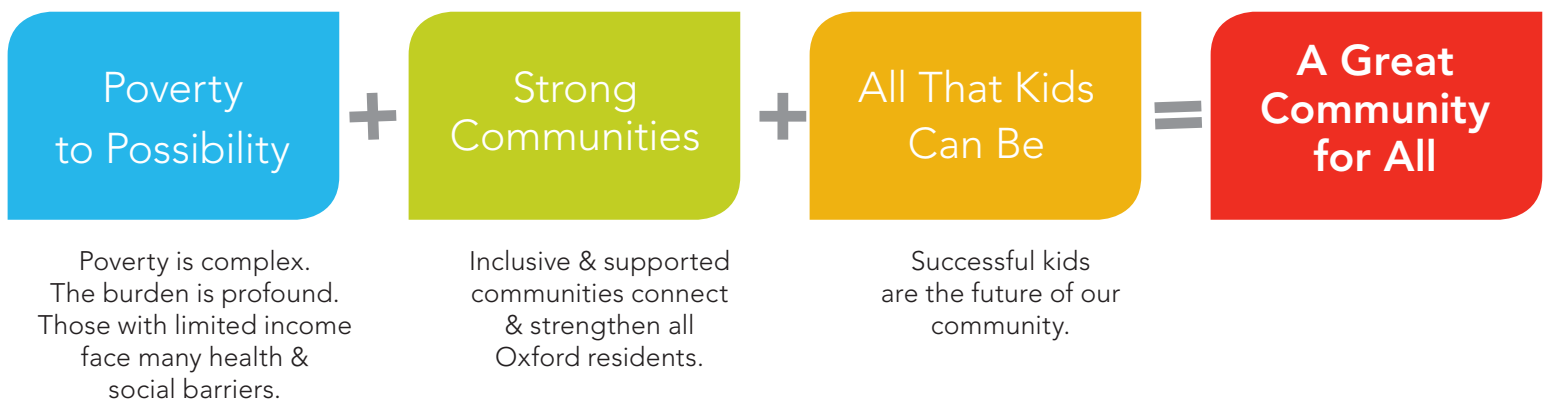
Your role is an important one! You are the go-to person, the one who assembles and guides a team and creates a plan. You are a champion and a cheerleader. You will help people understand 'why' United Way and celebrate successes. And guess what? We are here to help you every step of the way!

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 Oxford's fundraising and privacy practices. 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 United Way representative.

Why United Way?

Our families, friends and neighbours are struggling. As a community, we take care of each other. United Way understands what that means and we understand local issues. For over 50 years, with the support of our community, we've been working to improve lives. We bring together partners - business, labour, service providers, community leaders, government and residents - helping to create opportunities for a better life.

Targeted Investments



8 Steps To Success!

- 1 First things first... Meet your United Way Staff Partner**

Our Resource Development team would love to meet with you to discuss strategies and ideas that will help you with planning and recruitment. This is also a great opportunity for us to answer your United Way questions!
- 2 Involve Senior Management/Labour (if applicable)**

Invite your CEO/senior manager/union leader to speak at planning meetings, kickoffs etc. Encourage him or her to take an active and visible role in your workplace campaign.
- 3 Recruit your Ambassadors/Committee**

Organize a committee of dedicated volunteers from across your organization. Be sure to seek support from different departments. Schedule a training session with United Way to prepare your ambassadors! Check out this handy guide for tips and tricks.
- 4 Set Goals**

Set ambitious yet realistic goals using the challenges and successes of previous years as a benchmark. Don't just focus on dollars! What about increasing employee participation and increasing the average gift.
- 5 Plan Your Campaign**

Schedule key dates, presentations and plan your pledge form distribution. We've got some fabulous resources to help! Have you checked out our engagement menu? We also have videos, sample messaging, posters and impact stories. Our best practices guide is chalk full of tips & tricks.
- 6 Promote, Monitor & Report**

Infuse spirit and energy into your campaign. Monitor and share progress with your colleagues.
- 7 Celebrate Your Success!**

Publicly acknowledge your committee and ambassadors. Celebrate your campaign successes with your entire organization. Be sure to properly recognize canvassers. We have thank you cards and certificates that you will find helpful.
- 8 Evaluate Your Campaign**

Debrief time! Look at what worked well and look for growth opportunities. How did you spend your time? The analysis is a great foundation for planning in next year's campaign. Be sure to share with United Way. Others will find your ideas helpful!



General Tax Receipting

Before promising a tax receipt to a donor, always check in with your United Way staff partner or the Canada Revenue Agency (CRA) to ensure a donation can be receipted under tax receipting regulations. This applies to any donation, for example, lottery tickets, goods for an auction, casual day donations, etc. One of the most unpleasant tasks a volunteer can face is telling a donor they will not be receiving a tax receipt after all.

When will a receipt be issued?

Every attempt is made to issue a receipt within two weeks of us receiving the donation, the exception is for monthly donors who are receipted yearly.

As per CRA rules we must receipt in the year the transaction takes place, what this means for you; if a donor gives a cash, cheque or credit card donation in November but is not received and deposited into the following year, the donor will not receive their tax receipt until the year it was received.

What can be receipted?

United Way Oxford automatically issues receipts for donations of \$20.00 or more, provided the donation is voluntary, or given by free will, and is without expectation of receiving something in return. Examples of gifts that can be receipted:

Direct donations made to United Way in the forms of cash, cheque, or credit card. These are receipted for the tax year in which the money is received; however, monthly donations will be receipted once at the end of the calendar year.

Non-cash or gifts in kind such as bequests, capital property, or products that are given directly to UW where the fair market value can be determined.

Payroll donations where employees are entitled to a tax receipt at the end of the year. The receipt can be provided in ONE of the following ways:

- Through your T4 slip provided by your organization; OR
- Through United Way after we have received your final payroll remittance for the year.
Note: Your payroll administrator will need to provide us with the name of each payroll donor and the amount deducted for the year.

What cannot be receipted?

Donations of business or personal services. Examples, lawn service, property rentals, photography sessions...

- A donation where the donor has received some form of material or service incentive to give, for example, a bake sale or BBQ, or the possibility to receive an item such as a lottery.
- Donation of business merchandise and assets, for example, stock in trade for donors or a business expense.
- Proceeds from auctions or raffles, for example, auctions or raffles of goods or services, or those who buy items at a charity auction (even if the price paid exceeds the fair market value of the item).
- 3rd Party receipting, for example, donating an item to a company auction even though the proceeds are going to a charity.

What can be partially receipted?

Donation component of the admission price to a meal or entertainment event. For example, if a lunch costs \$30 per person (including HST) and the admission price is \$100, then a receipt can be provided for the \$70 difference.

What's in it for you?

Tax savings! For every donation you make, you are eligible to receive tax benefits, check out the table below to see how much you can save: (approximate based on 2015 tax information)

Gift Amount	\$100	\$365	\$500	\$1,200
Federal Tax Credit	\$15	\$78	\$117	\$320
Ontario Tax Credit	\$5	\$29	\$44	\$122
Total Tax Savings	\$20	\$107	\$161	\$442
Total savings to you	\$80	\$258	\$340	\$758



Helpful Tools & Resources

United Way has many tools and resources available that you may find helpful when planning your workplace campaign. We offer:

Campaign Resources

- Campaign in a Day Toolkit
- Videos
- Plastic United Way Banners
- Pledge Forms
- Posters
- Tip Sheets
- United Way Balloons
- United Way Stickers
- Sample Messages
- Thank you cards & certificates
- United Way Aprons
- United Way Stand Up Banners (Indoor use only)

Educational Resources

- Report to the Community
- Audited Financial Statements
- FAQ's
- Impact Stories
- Listing of United Way Funded Partners and Grants
- Impact Speakers

Special Event Resources

- Workplace Event Ideas

**Thank you for volunteering
with United Way!**

Questions? Contact us today!



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