

McMaster University United Way Campaign

Event Planning Toolkit



Table of Contents

About the United Way of Halton & Hamilton.....	3
About the McMaster United Way Campaign.....	4
Steps to Planning a Successful Fundraiser.....	5
Tax Receipting Policy.....	7
Financial Support Request Form.....	8

About United Way of Halton & Hamilton

A strong, supported, resilient community benefits all of us. Everyday, United Way Halton & Hamilton has a profound impact on our community by ensuring an essential network of programs and services work together to achieve lasting, positive change. No other organization has the same depth, reach and history of making such a profound difference in the lives of others.

Vision

Strong, empowered communities without barriers, in which everyone can thrive.

Mission

To improve lives, build community and ignite action.

Values

United Way Halton & Hamilton is guided by a strong commitment to community, urgent social needs and measurable impact.

Courage – through innovation, resilience and collective action to change the odds

Compassion – through empathy, understanding, caring for others and a pledge to serve

Conviction – through visionary leadership, persistence, passion and a commitment to excellence

Credibility – through integrity, transparency, inclusion, diversity and respect

For more information, visit www.uwhh.ca

About the McMaster United Way Campaign

Community engagement and service to the public good are core components of McMaster's culture. In fact, Community Engagement is one of the four pillars of the [Forward with Integrity strategy](#). The McMaster United Way Campaign gives employees the opportunity to become more engaged in the local community through various fundraising initiatives.

McMaster's 2019 United Way Campaign officially opens on October 1 and will run until January 31, 2020. Help us ensure the McMaster Campaign becomes the largest workplace campaign in the Hamilton & Halton areas once again by helping us surpass last year's total of \$283,000. Donations are gratefully accepted all year toward the Workplace Campaign.

For more information, visit <https://hr.mcmaster.ca/employees/community-engagement/united-way/>

Steps to Planning a Successful Fundraiser

Step 1: Form a Planning Team

Whether it is two people or ten, it is always a good idea to put a team together, as many hands make light work. The role of the team is to oversee the organization of the activity or event. Recruit enthusiastic, dedicated team members with a variety of skills to share the responsibilities to help you plan and organize. Assign specific tasks to all team members, and make sure to attach timelines. Remember, a dedicated team is often an essential component to a successful event!

Step 2: Set Goals and Budget

How much money do you reasonably expect to raise? Is there an awareness piece that you think would also be valuable? What is a reasonable timeline? Before you start to brainstorm what your fundraiser is going to be, try to answer these key questions.

Step 3: Brainstorm

Think of activities that you and your coworkers enjoy, and think of ways to that that into an event idea that your committee can get excited about. Your event should be appropriate to the goals, interests, skills, size and time available to you.

For some sample ideas, please feel free to visit <https://hr.mcmaster.ca/unitedway>

Step 4: Permits, Insurance, and Safety

Check well in advance of the event to see if there are any special permits, contracts, licenses, and insurance required. If you are unsure, feel free to check in by emailing uway@mcmaster.ca or calling 905-525-9140 ext. 24460.

Step 5: Promote Your Event

Promoting an event effectively is important to its success. Keep your target audience in mind and discuss methods of advertisement that would be most suitable. Some examples of methods to promote your event are:

- Email Blast
- Posters
- Departmental Social Media
- Word of Mouth

Additionally, we can also promote your event on the McMaster United Way Webpage, as well as in upcoming newsletters and promotions

Step 6: Run the Event

Event day is finally here! Here are some helpful hints for the day of your event:

- Have a timeline for your team to follow so everyone knows what is supposed to happen and when
- Have an emergency protocol communicated between you and your team in case an issue arises
- Keep track of donor names and contact details in case a tax receipt is requested
- If you require United Way of Halton & Hamilton promotional material, please let us know and we will happily provide it to you
- Thank your participants
- Have fun!

Step 7: Collect Funds

After your event, please collect the funds raised and submit them to the United Way Campaign Coordinator in the Human Resources Services Office in Gilmour Hall Room 304. Please do this within 48 hours of your event, if possible. 100% of these funds submitted will go to the United Way of Halton & Hamilton.

Step 8: Recognize and Say Thank You

It's important to acknowledge the partners, volunteers, and attendees who came together to make the event a success. Keep this in mind during your planning stage so that you can keep a list of who you will need to thank once the event is complete. It's essential to let them know how much you appreciate their support.

Step 9: Evaluate

Take a few minutes to debrief with your team to review the event and its successes. It will be very helpful to have a list of what worked and areas for growth for future events.

On behalf of the McMaster United Way Committee, thank you for your time, effort, and support. Good luck with your event!

Tax and Receipting Policy

Tax Receipting Policy

- Direct cash and cheque donations (made to United Way of Halton & Hamilton) of \$25 can be issued a tax receipt upon request. Please collect the individual's full name and mailing address
- Gifts in kind, also known as non-cash gifts, are gifts of property. They cover items such as tickets, artwork and equipment. These will receive a "gift in kind" tax receipt.
- A contribution of services time, skills, or efforts, is not property and therefore, does not qualify as a gift or gift in kind for purpose of issuing official tax receipts
- Please note that successful bids on auction items or purchasing of raffle tickets cannot result in a tax receipt, as the purchaser or winning bidder is receiving something in return for their donation.

Financial Assistance & Event Proposal Forms

The theme for the 2019-2020 Campaign is *Many Hands Make Light Work*. In addition to annual programming such as the Pull4Mac Bus Pull and Online Auction, the United Way Committee is encouraging departments to plan and execute their own fundraisers to drive community engagement while raising funds for an incredible not-for-profit organization.

The United Way Committee is dedicated to supporting departments in their fundraising endeavours. In addition to our library of online resources, the United Way Committee will be offering financial support of up to \$200 to 10 McMaster University Departments who wish to run fundraising events. In order to be eligible, the following criteria must be met

- Funds must be utilized for a department or faculty fundraiser with all funds raised going directly to the McMaster United Way Campaign
- Fundraiser must occur between October 1, 2019, and January 31, 2020
- Fundraiser must occur at one of McMaster University's campus locations
- Financial support cannot go towards pre-existing United Way events, such as Pull4Mac and the Online Auction
- Fundraiser must be approved by the Program Coordinator, Engagement & Wellness

Completed applications will be accepted beginning October 1, 2019, and can be submitted at any time during the campaign. Each application will be reviewed by the United Way Committee within two weeks of submission. To review the application, visit (Link).

If you have any questions, please contact Kyle Armstrong, Program Coordinator, Engagement & Wellness at karmstr@mcmaster.ca or 905-525-9140 ext. 24460

2019-2020 McMaster United Way Campaign

Fundraising Support Application

Please provide the following information

Name

Phone Number

Email Address

Position

Department

Briefly describe your plan for the fundraiser you would like to organize.

Please outline the anticipated expenses the financial support would (example: print materials, prizes, etc).

Approximately when will this fundraiser be taking place?

Who is the target audience for this fundraiser?

Outline the impact your fundraiser will have on the McMaster community and the United Way campaign.

If applicable, please select a United Way Agency you would like your fundraising proceeds attributed to. A list of currently United Way Agencies can be [found here](#).

If approved, would you like your fundraiser to be advertised on the McMaster United Way Campaign website?

*I understand that should my department or faculty be selected for financial support for a United Way fundraiser, that I must submit all funds to Gilmour Hall Room 304 no later than two weeks after the date of the event. Should the department or faculty cancel the fundraiser once approved, all funds must be returned via Journal Entry to the United Way Campaign no later than January 31, 2020.

Name

Signature

Date