

United Way of Oakville Employee Campaign Coordinator Guide



United Way
of Oakville



**Thank you for volunteering as the Employee Campaign Coordinator (ECC) for
your United Way of Oakville (UWO) Campaign!**

Every volunteer makes a difference within the community.

Role of ECC

Each organization appoints an ECC to lead their campaign. The ECC acts as the liaison between their employer and UWO and is responsible for planning, organizing and evaluating the campaign.

As the ECC, you will be asked to:

- work closely with your UWO staff partner to develop an effective campaign strategy
- attend the ECC Training Workshop
- assemble a campaign committee that represents all levels of your organization
- develop a campaign plan
- submit pledge forms and campaign reports to UWO
- evaluate your campaign and make recommendations for next year

Staff Partners

Mary Park - Director, Resource Development ext. 235; mary@uwoakville.org

Kate Williamson - Manager, Resource Development ext. 230; kate@uwoakville.org

Daniela Purves - Manager, Resource Development ext. 234; daniela@uwoakville.org

United Way of Oakville

466 Speers Road Suite 200

Oakville, Ontario L6K 3W9

Phone: 905-845-5571

Fax: 905-845-0166

Website: www.uwoakville.org

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Building Block #1: Learn About United Way & Build Your Committee

What is United Way of Oakville?

United Way of Oakville (UWO) funds 60 programs and services accessed by thousands of people through 31 human and social service agencies. In addition to being a major fund provider, UWO offers professional development workshops to staff and volunteers in the non-profit sector.

UWO has four funding priorities. Emphasizing both prevention and crisis intervention, the funding priorities provide clear direction to ensure that UWO maximizes each donor dollar and its impact on the Oakville community.

The Funding Priorities are:

- **Strengthen Families**
Focus on children and youth, new Canadians and family support
- **Support independence and well-being in seniors**
Focus on quality of life for seniors and caregivers
- **Support those in crisis**
Focus on addictions, violence, abuse and mental illness
- **Promote self-sufficiency in individuals**
Focus on literacy, hunger relief and mental health

Meaning of United Way Symbol

The United Way logo is also called the helping hand symbol and is used by United Ways around the world. It symbolizes a message and a mission - to increase the organized capacity of people to care for one another.



Gain Support from Management and Labour Leadership

Visible management and labour leadership involvement sets the stage for strong employee participation. As you begin to plan your campaign, be sure to approach key individuals and secure their commitment. Request the following:

- Approval to work on the UWO campaign during work hours, for committee members and canvassers
- Endorsement of UWO campaign plan and goals
- Appoint a Leadership Chair who coordinates a Leadership Presentation and/or Leadership Canvass
 - *Appendix A: Employee Campaign Committee Position Descriptions*
- Visible presence at campaign kick-off and wrap-up events
- Authorization of a UWO campaign budget to cover costs incurred

Build a Committee

The size and shape of your campaign committee will vary depending on the size and structure of your organization. It should fulfill the following requirements:

- The committee accurately reflects the structure and composition of your workplace
- Employee Campaign Committee members are UWO supporters who possess the skills and commitment to complete their assignments effectively

Appendix A: Employee Campaign Committee Position Descriptions

Recruit Canvassers

Canvassers are ambassadors for your UWO campaign. Each canvasser should approach approximately 15 to 20 co-workers, and provide them with an opportunity to make an informed decision about charitable giving, including:

- explaining UWO, its philosophy and answering questions
- outlining your UWO campaign timeline
- requesting donations from co-workers
- providing UWO agency information to those who may need it
- thanking donors

Successful canvassers:

- use a personal touch, either face-to-face or by making a friendly phone call
- participate in canvasser training to discuss roles and responsibilities

Building Block #2: Develop an Action Plan

Host a Campaign Planning Session

Campaign planning is a step-by-step process designed to help you and your committee develop effective employee campaign strategies. This session is facilitated by your UWO staff partner. Invite your entire campaign committee to participate in the session. Campaign planning will help re-energize and improve mature campaigns and kick-start new ones.

Past Campaign Review

Before you get started, review the previous year's campaign to determine its strengths, weaknesses and areas for improvement.

Appendix B: Campaign Review Questions

Two important benchmarks to be reviewed are Participation Rate and Average Gift per Donor:

1. Participation Rate is calculated:

Number of Pledge Card Donors divided by Number of Employees

2. Average Gift per Donor is calculated:

Total Pledge Card Dollars divided by Number of Pledge Card Donors

Prepare a Timeline

The best results come from a short-term, goal-oriented campaign. A two-week time frame is ideal. The campaign planning session will assist you in this process.

Appendix C: Sample Two Week Employee Campaign Timeline

Set Financial and Participation Goals

Both financial and participation goals should be set; these targets should be challenging, yet achievable. The campaign planning session will assist you in this process.

Appendix D: Goal-Setting Worksheet

Building Block #3: Get Ready

Arrange an Agency Speaker / Video / Tour

Incorporating speakers, videos and tours into your campaign will greatly contribute to your campaigns success. These interactions demonstrate how your donations to UWO impact the lives of those living in our community. This also gives our agencies and recipient of services a wonderful opportunity to express gratitude to your donors.

Agency Speakers

Agency speakers personalize the UWO message for your co-workers. Ideally the speakers are invited to canvasser training, Leadership presentations and kick-off events. Contact your UWO staff partner to request an agency speaker.

UWO Public Awareness Films

Showcasing one of UWO's short public awareness films is an excellent way to educate your co-workers. Contact your staff partner – or visit <http://www.uwoakville.org/uwofilms.html>. These films are ideal to use during committee meetings, canvasser training and kick-off events.

Agency Tours

Tours of United Way funded agencies will have a tremendous impact on participants. This is especially meaningful for committee members and canvassers. Contact your staff partner to arrange an agency tour.

Order Supplies

UWO provides all essential materials for your campaign at no cost, including:

- pledge cards
- campaign brochures
- posters
- leadership brochures
- banners & table flags
- presentation cheque
- United Way stickers and Dress Down Day stickers (limited quantity)

Accessing materials is quick and easy! Please find these resources in UWO's online Campaign Toolkit at <http://www.uwoakville.org/toolkit.html>. Or contact your staff partner at (905) 845-5571. Requests for the above promotional items are on a first come first serve basis, so book early!

A merchandise catalogue with items for purchase is also available:
www.supplies.unitedway.ca

Personalize Pledge Cards

Personalized pledge cards lead to increased employee participation! Pledge cards should be personalized with each employee's name and employee number, if appropriate. It is also much easier to process and submit pledge cards that are pre-printed. Each pledge card should also be distributed with a campaign brochure.

Promote the Campaign

Accurate and creative verbal and written communication is the key to promoting your campaign. Educate co-workers by publishing newsletter articles, displaying posters, hosting promotional events and advertising key campaign dates.

Building Block #4: Kick-off & Canvass

Begin Your Campaign with a Kick-off Event

It is essential that every United Way campaign has a definite beginning and end! Your kick-off event may take the form of a breakfast, lunch, or any other way to gather your co-workers. At least two weeks before the event, send an invitation to your co-workers communicating the purpose of the kick-off. Invite your United Way staff partner and an Agency Speaker to teach your co-workers about United Way. Send a reminder email to your co-workers two days before the event.

Appendix E: Sample Kick-off Agenda.

Run a Leadership Campaign

The Leadership Giving Program promotes and recognizes personal annual contributions of \$1,000 or more.

Organizations that hold a Leadership Giving Campaign recruit a Leadership Chair to coordinate a presentation for their colleagues, typically a week or two prior to the campaign kick-off. The presentation typically includes short remarks from a UWO staff partner, an agency speaker and a request for donations at the Leadership level. Participants are then approached by a one-on-one canvass from the Leadership Chair or Leadership Canvassers.

The Sprott Leadership Matching Challenge

If the donor makes a first time Leadership gift of \$1,000 to UWO, or increases their Leadership gift made in 2008, The Sprott Leadership Matching Challenge will match the entire amount of the first-time donation or the amount of the increase, up to \$150,000. Only new and increased Leadership donations made directly to United Way of Oakville, not including donations designated to other United Ways or other charitable organizations, are eligible for The Sprott Leadership Matching Challenge.

Appendix F: Key Steps to Running a Leadership Campaign

Canvass Employees for their Donations

There are two different ways to canvass.

- **One-on-One:** The most effective way to canvass is one-on-one; people give to people. This highly effective method involves recruiting and training canvassers who approach co-workers individually and ask them to consider contributing to United Way.

Appendix G: Donation Receipts and Tax Savings.

- **Group Canvass:** This method provides a consistent message and requires fewer canvassers than one-on-one canvassing. The group canvass is typically delivered at the kick-off event, with pledge cards distributed and collected during the session. Group canvass meetings can include remarks from a UWO staff partner, an agency speaker and/or a UWO film and a message from management/union(s).

Monitor the Progress of the Canvass

It may be necessary to re-canvass after the initial approach, to guarantee that each employee has had the opportunity to participate.

To determine if a re-canvass is necessary, hold a meeting with your canvassers. Poll them to see who has completed all their one-on-one meetings and what the results were. Identify any key issues and address them immediately. This meeting is usually held when 50 per cent of donations have been submitted.

Whether or not people donate, aim for 100 per cent return of pledge cards. This will make it easier for you to determine who still requires follow up and may inspire some employees to make a donation rather than to return a blank pledge card.

Building Block #5: Special Events & Wrap-up

Organize and Promote Special Events

Special events help enhance payroll giving, but should not be to compete or take the place of a payroll deduction gift. Be sure that any major fundraising events are held after the employee canvass, so individuals do not feel that the money they spend on various events replaces their pledge card donation.

Appendix H: Special Events Guide

You may also refer to: *Fun-Raising: Your Guide to Successful Special Events*

End your Campaign with a Wrap-Up Event

Remember, it is essential that every United Way campaign has a definite beginning and end! The wrap-up will give your organization an opportunity to announce and celebrate its campaign achievements, thank donors and recognize volunteers.

Remit Donations to UWO

Do not wait until the end of your campaign to remit donations to UWO. Make arrangements with your staff partner for regular pick-ups. Remit all pledge cards and donations in Campaign Envelopes and Leadership Envelopes to facilitate tracking and processing.

Building Block #6: Recognize & Evaluate

Participation Awards

UWO thanks employees through its Participation Awards Program. At the end of the campaign, UWO will present your organization with a personalized certificate acknowledging the level of pledge card participation achieved. (This figure is calculated by dividing the number of pledge card donors by the number of employees).

Review past participation levels and target a specific level for the upcoming campaign. Publicize your participation goal. You can even make it part of your campaign theme (i.e. "Go for the Gold!", "Push for Platinum!").

Participation award levels:

- Platinum 100%
- Gold 80% - 99%
- Silver 60% - 79%
- Bronze 40% – 59%
- Merit up to 39%

Thank Donors and Recognize Volunteers

"Thank you!" We all like to hear these two simple words of appreciation. Appoint a member of your committee to be a Recognition Coordinator to ensure that all who contribute their time, effort and money are properly acknowledged. Remember to thank all donors, committee members, canvassers, union members and gift-in-kind donors.

Evaluate the Strengths and Weaknesses of your Campaign

Invite your committee members and canvassers to discuss the strengths and weaknesses of your campaign in an evaluation session. Schedule this meeting while the campaign is still fresh in everyone's mind.

Enjoy the campaign!

Appendix A: Employee Campaign Committee Position Descriptions

Canvasser Coordinator

- Determine canvassing method (one-on-one or group canvassing)
- Recruit canvassers
- Co-ordinate the training of canvassers (UWO provides Canvasser Training)
- Monitor progress
- Submit pledge cards to Finance Coordinator/Treasurer

Communications Coordinator

- Prepare print materials to promote the employee campaign (i.e. posters, signs, letters, newsletters, etc...)
- Distribute print materials
- Prepare & distribute electronic messages

Labour Representative

- Promote the campaign to labour employees
- Recruit labour canvassers to approach their peers
- Support the Joint Union Management Campaign (if applicable)
- Co-ordinate the training of canvassers (UWO provides Canvasser Training)
- Monitor progress
- Submit pledge cards to Finance Coordinator/Treasurer

Location Coordinator

- Represent branch or location
- Inform employees of the branch or location of upcoming kick-off, employee canvass, special events and wrap-up
- Address questions & relay suggestions

Finance Coordinator/Treasurer

- Collect pledge cards from employees, canvassers and/or Canvasser Coordinator
- Verify pledge cards are completed correctly
- Track pledge cards
- Remit pledge cards to UWO staff partner

Recognition Coordinator

- Thank donors
- Recognize volunteers
- Sample recognition letters are available at <http://www.uwoakville.org/toolkit.html>

Retiree Chair

- Contact retirees of your workplace
- Canvass retirees for a donation one-on-one, via personal visit or phone call
- Conduct a follow-up of canvassed retirees
- Submit pledge forms to Finance Coordinator/ Treasurer
- Attend employee campaign meetings including Campaign Planning Session
- Attend & participate in the employee campaign kick-off
- Attend & participate in the employee campaign wrap-up
- Keep Employee Campaign Coordinator up-to-date
- Support Employee Campaign Coordinator & other Campaign Coordinators
- Respond to inquires about UWO

Special Events Coordinator

- Organize employee campaign kick-off
- Organize employee campaign wrap-up
- Organize special events after the employee canvass

Leadership Chair

In most organizations, an individual is appointed by the CEO to serve as the Leadership Chair. This person is usually a member of the senior management team and does the following:

- Makes a personal gift to United Way of \$1,000 or more
- Recruits and trains Leadership Canvassers (if applicable)
- Identifies a pool of new and existing donors
- Develops a Leadership plan (including goals and strategies)
- Arranges for a Leadership presentation
- Co-ordinates the canvassing of current and potential Leadership donors
- Monitors and reports Leadership results
- Ensures that Leadership donors receive appropriate thanks and recognition
- Co-ordinates his/her efforts with the employee campaign by working with the Employee Campaign Coordinator
- Evaluates the Leadership program at the end of the campaign and makes recommendations for next year

Leadership Canvassers

Leadership Canvassers are volunteers recruited by the Leadership Chair to make solicitation calls on their peers. Leadership Canvassers also make personal gifts to UWO of \$1,000 or more. There are several important advantages to involving Leadership Canvassers in your campaign:

- The most effective way to ask for a donation is face-to-face. By enlisting a team of canvassers, you can ensure that every renewing and prospective donor is approached personally
- One-on-one canvassing allows people to ask questions that they may be reluctant to ask in a group setting
- By approaching individuals one-on-one, canvassers are able to customize UWO's message

Appendix B: Campaign Review Questions

- What were the major strengths and weaknesses of previous campaigns, particularly last year's campaign?
- What was your goal? Did you achieve it?
- What percent of total dollars came from pledge card donations?
- What percent of total dollars came from special events?
- What was the overall participation rate?
- What was the average gift per donor?
- Was there a Leadership Campaign to encourage gifts of \$1,000?
- How many people gave gifts of \$1,000 or more?
- How many donors gave gifts of \$500 - \$999?
- Was there a corporate match program? If so, did it enhance employee giving?
- How long did the campaign run?
- Was there a kick off and a wrap-up?
- Were pledge cards personalized?
- Were there new donors and/or dollars? If so, why (new employees, more effective canvassing, etc.)?
- Were there fewer donors and/or donations? If so, why (downsizing, ineffective canvassing, etc.)?
- What role did management play in the campaign?
- What role did labour play in the campaign?
- How were employees canvassed?
- Was the canvassing effective? If so, how? If not, why?
- Were special events effective? If so, how? If not, why?
- How were donors thanked? Was this effective?
- How were volunteers recognized? Was this effective?

Appendix C: Sample Two Week Employee Campaign Timeline

Sample Dates: Oct. 8th, 2009 to Oct. 22, 2009

Task	Responsibility	Date(s)
Send Kick-off invite and schedule of events mass e-mail	Communications Coordinator	Sept. 24
Organize a Leadership Campaign	Leadership Chair/ECC	<i>Refer to Appendix F, sub-paragraph #4</i>
Host a Kick-off lunch/ breakfast event *send email reminder two days before	ECC / Special Events Coordinator	Oct. 8
Invite a UWO staff partner to train canvassers one week before the campaign begins	Canvasser Coordinator/ ECC	Oct. 9
Canvassers begin to canvass	Canvasser Coordinator/ ECC	Oct. 9
Send "Early Bird Draw Reminder" mass e-mail	Communications Coordinator	Oct. 12
Select winner of the Early Bird Draw	Canvasser Coordinator	Oct. 14
Canvassers follow-up, as necessary	Canvasser Coordinator/ ECC	Oct. 14 & Oct. 15
Send "Final Reminder" mass e-mail	Communications Coordinator	Oct. 15
Wrap-up canvassing	Canvasser Coordinator	Oct. 16
Host a special event (silent auction etc.)	Special Events Coordinator	Oct. 20 & Oct. 21
Host a wrap-up event (breakfast/ lunch)	Special Events Coordinator/ ECC	Oct. 22
Distribute Appreciation Certificates to committee members during wrap-up	Recognition Coordinator	Oct. 22
Send thank you letters to donors after wrap-up	Recognition Coordinator	Oct. 22
Send "final results & thank you" mass e-mail and submission to your corporate communications (ie. Company newsletter, website, intranet etc.)	Communication Coordinator	Oct. 22

Appendix D: Goal Setting Worksheet

Set goals in order to establish a clear direction and concrete objectives for your campaign.

- Review the results of your past campaign analysis
- Identify areas of your campaign which have been successful and those with potential for improvement.

Goal-Setting Worksheet

2008 Employee Campaign Results:



of Donors: _____

Participation Award Received: _____

of Leadership Donors: _____ Leadership Dollars: \$ _____

This Year's Employee Campaign Goal:



Projected # of Renewing Donors: _____ Projected # of New Donors: _____

Participation Award Goal: _____

of Leadership Donors Goal: _____ Leadership Dollars Goal: \$ _____

Appendix E: Sample Kick-off Agenda

- 8 a.m. - Prepare room
- 9 a.m. - Staff enter, help themselves to breakfast and have a seat
- 9:05 a.m. - 9:10 a.m. - CEO and Labour Leader welcome staff
- Employee Campaign Coordinator (ECC) introduces UWO staff partner
- UWO staff partner introduces Agency Speaker or Agency Video
- 9:10 a.m. - 9:16 a.m. - Agency Speaker speaks or Agency Video is shown
- 9:16 a.m. – 9:20 a.m. - UWO staff partner speaks
- 9:20 a.m. – 9:25 a.m. - ECC provides details regarding the canvass & special events
- ECC announces Leadership giving results
- ECC announces a campaign goal
- ECC thanks everyone for their attendance
- 9:25 a.m. – 9:30 a.m. - Question & answer period

Details regarding the canvass:

- Give the exact date, time and location of the Early Bird Draw
 - ensure absent staff have the opportunity to be canvassed before the Early Bird Draw is held
- Announce the names of the canvassers and which department they will be canvassing
- Announce where pledge cards may be submitted if they are not returned to the canvasser (i.e. Treasurer in Finance Department)

Appendix F: Key Steps to Running a Leadership Campaign

1. Secure and communicate support from senior management for a Leadership Giving Campaign.
2. Recruit a Leadership Chair to direct the Leadership Giving Campaign. This person should already give at the Leadership level.
3. Review current and potential Leadership giving statistics. This would include identifying Leadership renewals and appropriate prospects for all levels of Leadership giving.
4. Establish timelines. Leadership Campaigns can run in advance of the general campaign. Announcing Leadership giving results during the general campaign kick-off generates excitement, builds enthusiasm and inspires others to give.
5. Schedule a Leadership presentation at a regular meeting within the organization.
6. Collect pledge forms during the Leadership presentation from those who have made their decision to give.
7. Conduct one-on-one follow-ups with those who did not return their pledge form.
8. Send a prompt personal thank you to anyone giving at the Leadership level.
9. Complete the Leadership envelope provided by your UWO staff partner and return it as soon as possible. You do not need to wait until the end of the campaign to submit the Leadership Envelope.

Appendix G: Donation Receipts and Tax Savings

Donation Receipts

One-time* donations are received by United Way. Payroll deduction donations are received on T4 slips.

Receipt of a 2009 Campaign donation:

Type	Paid	Received	By Whom	How
One-Time	During Campaign	Post-Campaign	United Way of Oakville	By Mail
Payroll Deduction	Throughout 2010	Early 2011	Employer Payroll Department	T4 Slip

*A one-time donation is any gift that is not being deducted through payroll. Examples of one-time donations include cash, cheques, post-dated cheques, credit cards and Electronic Fund Transfers. Income Tax receipts are issued for donations of \$25.00 or more, unless otherwise requested.

Tax Savings

United Way issues tax receipts that will reduce your federal and provincial income tax.

For example:

Your Gift Of:	Total Tax Savings	Actual Cost To You
\$100	\$21.05	\$78.95
\$200	\$42.10	\$157.90
\$500	\$162.58	\$337.42
\$1000	\$363.38	\$636.62
\$5000	\$1969.78	\$3030.22

* The tax savings listed above are approximate based on an Ontario annual income of \$40,000 to \$60,000. Tax savings will be greater where taxpayer is subject to Ontario surtax.

Appendix H: Special Events Guide

Choose carefully when preparing your plan. Be sure to ask the following questions:

- What would we like to accomplish with this event?
 - Raise money/Raise awareness/Boost employee morale/Thank employees for their support/Announce the achievement of the organization's campaign?
- What is your financial goal for this event?
- How much time will be required to organize the event?
 - What other resources are required, i.e. money, equipment, volunteers
- Is special approval or a license required?
- Does the special event compliment the employee canvassing?

Special Event Receipts

1. Sponsorship or pledge donations (\$25 or more).

Sponsoring or pledging of a participant in an event, (i.e. Walk-a-thon, Bowl-a-thons, Dance-a-thons) entitles the donor to a tax receipt. This does not include corporate event sponsorships.

2. Donations of goods by individuals and businesses.

Donations of goods (not services) for use during an employee campaign are receiptable. The receipt issued is referred to as a "Gift-In-Kind" tax receipt and is different from the tax receipt issued for cash donations. Gift-In-Kind tax receipts can only be issued for amounts of over \$100 and the total Gift-In-Kind tax receipts from special events cannot exceed the amount of total special event proceeds remitted to UWO.

Requests for "Gift-In-Kind" tax receipts should be submitted with special event money and supported by the following information:

- Description of the donated item
- Fair market value of the donated item

- Date item was donated
- Name and complete address of donor
- Written communication from the ECC stating how the item was used
- An invoice supporting the value of the donation for all “out of inventory” goods

Gifts that are not receiptable:

1. Raffles and Auctions

Individuals who purchase raffle tickets cannot receive a tax receipt. The purchaser is receiving an incentive for giving. Individuals who purchase auction items cannot receive a tax receipt. The purchaser receives the item in return for their bid.

However, if the purchaser’s bid exceeds 120% of the item’s value, a tax receipt may be issued for the difference between the item’s value and the bid.

2. Donations of services

Tax receipts may not be issued for donated business services.

3. Donation of Personal Services

Tax receipts may not be issued for voluntary services.

4. Donors Receiving an Incentive

If donors receive any form of material incentive to give, then the gift is not receiptable because this incentive would have some form of cash value. This would apply even if the value of the incentive were less than the amount of the gift. It also applies if the donor receives promotional value as a result of the gift, (i.e. corporate sponsorship). This does not apply if the incentive has only nominal value.

Gifts that are Partially Receiptable:

1. Admission fee for a golf tournament, a meal or entertainment event.

Canada Customs and Revenue Agency regulations permit the issuing of a tax receipt for the donation component of the admission price. See examples below.*

- If a golfer participates in a golf tournament and the value of the green fees, golf cart and dinner totals \$150 and the admission price is \$350, a tax receipt can be issued for \$200
- If an event participant receives a lunch valued at \$30 per person (including GST) and the admission price is \$100, a receipt can be issued for \$70
- If an event participant views a concert with the ticket valued at \$150 and the admission price is \$150, a receipt cannot be issued

*These examples are very simple situations. Contact your UWO staff partner if your event includes other variables (i.e. door prizes).

Special Event Licenses

Raffles, casinos and some auctions require a license. It takes a minimum of 30 days to process an application with the Town Clerk's Department. Contact the Town of Oakville's office for information and applications 905 845-6601.

Before you submit your application to the Clerk's office please call your UWO staff partner at 905 845-5571 to advise UWO of your submission.

Thank you!

Your participation is crucial in achieving the goals we, as a community, have set. Our community is changing. United Way is changing with it and we need you to be part of these changes.

The success of our campaign could not be possible without your dedication and energy.

Thank you for being ‘the **One**’ in your workplace.

