



## 2022 Employee Campaign Manager Training



United Way of the Ozarks

# Agenda

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- Introductions
- Overview of United Way
- What's New
- Designation Policies
- 2022-2023 Campaign
- ECM Role & Responsibilities
- Awards
- Best Practices
- Campaign Resources



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# UWO Campaign Staff

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- Greg Burris, CEO & President
- Rachael Walsh, VP of Resource Development
- Vickie Hicks, Resource Development Director
- Lenord McGownd, Donor Data & Resource Specialist
- Liz Wertz, AFL-CIO Community Services Liaison



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# What is United Way of the Ozarks?

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- Started as the Community Chest in Springfield in 1930
- Community Investment Experts
- Focusing on
  - Championing Children
  - Pathways out of Poverty
- Board President, Clif Smart
- A member of the United Way Worldwide organization



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# United Way of the Ozarks Mission

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“United Way of the Ozarks improves lives by raising funds and uniting support around our communities’ critical needs and red flags.”



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# Where We Are Now:

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- \$2.1 Million Annual Campaign
- Provide funding for 14 partner nonprofits (21 Programs)
  - Cancer Fund
  - Veterans Fund
- Serve individuals and families in 14 counties
  - Barry, Christian, Dallas, Douglas, Greene, Hickory, Laclede, Lawrence, Polk, Stone, Taney, Texas, Webster, & Wright
- United Way Programs
  - Give 5
  - 2-1-1
  - United Academy for Inclusion & Belonging
  - Emergency Food & Shelter Program



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# What's new at United Way of the Ozarks

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## What's Not?



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# Community Engagement in a Box



- What is it?
- Why are we doing it?
- Why is it important to our community?



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# Community Investment Strategy

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- **Community Investment Process-** Re-engineered this past Spring
- **New Community Investment Model**
  - New Strategic Funding Mix
    - 60% to “Upstream” programs
    - 30% to “Safety Net” programs
    - 10% to “Innovation” fund (“Shark Tank” competition)
  - **Opening the process** – An “on ramp” for new programs



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# Our 2022- 2023 Nonprofit Partners

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- Big Brothers Big Sisters
- Boys & Girls Clubs of Springfield
- Breast Cancer Foundation of the Ozarks (*new*)
- Community Partnership
- Court Appointed Special Advocates (CASA)
- Council of Churches
- Development Center of the Ozarks
- Good Dads (*new*)
- Great Circle
- Habitat for Humanity
- Harmony House
- Ozarks Counseling Center
- Ozarks Literacy Council
- The Victim Center



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# Designation Policy

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- The most POWERFUL way to give is the **Community Investment Fund**
  - Undesignated Gifts go into the Community Investment Fund
- Donors can designate to a specific United Way Fund
  - Upstream Fund
  - Safety Net Fund
  - Innovation Fund
  - Cancer Fund
  - Veterans Fund
- Write-In Designation to Nonprofit Partner (QR code on form)
  - You can find a list of our current funded nonprofit partners at [uwozarks.org](http://uwozarks.org)



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# 2022-2023 Campaign

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**Campaign Goal:** \$2,500,000.00

## **Leadership Giving Levels:**

**\$10,000+:** Alexis de Tocqueville

**\$5,000-\$9,999:** Community Visionary

**\$2,500-\$4,999:** Community Champion

**\$1,000- \$2,499:** Community Owner

**\$500-\$999:** Emerging Community Owner

**\$365:** Live United 365



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# Campaign Kickoff

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**Join us on Tuesday, August 30** to eat, drink and connect with Springfield's top hand-raisers, game-changers and difference-makers.

- Mix and mingle from 4:00- 6:00 p.m. Brief program at 4:30 p.m.
- You can purchase individual tickets for \$25 or a Bundle of 10 for \$200. Entry includes a drink ticket & hors d'oeuvres.
- Hosted by Gary Gibson & Morey Mechlin, Campaign Co-Chairs
- Music by Shaun Munday
- Farmers Park Pavilion, 2144 E. Republic Rd



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# Important Dates

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<b>August 30, 2022:</b>	Campaign Kickoff Celebration
<b>September-December:</b>	Campaign Season (pledges made)
<b>January 1, 2023:</b>	Payroll Deduction Begins
<b>March 31, 2023:</b>	2022 Campaign Ends (all pledges must be reported)
<b>June 2023:</b>	Day of Caring



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# Your Role as an ECM

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- You are the key to a successful workplace campaign
- You enable your co-workers to create a stronger community
- You plan, organize, and coordinate a successful campaign through:
  - Payroll Deduction/One-Time Giving/Rollover Campaign
  - Workplace Special Events



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# 2021 Pillar Awards

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- **Outstanding United Way Volunteer** – Cindy Norman, American National
- **Outstanding Community Service** - Community Partnership of the Ozarks
- **Corporate Humanitarian of the Year** – SMC Packaging Group



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# 2021 Top Employee Campaign Managers

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Michelle Bowler – KY3

Stephanie Cartwright – Community Partnership

Travis Comfort – Ricks Automotive

Megan Cunningham – City of Springfield

Peggy Dreiling – Timken

Kris Inman – City of Springfield

Karen Mellinger – City of Springfield

Jonna Nunn – Professional Answering Service

Sarah Weatherly – TransLand

Debbie York – Bank of Missouri



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# Steps to a Successful Campaign

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- Before Campaign:
  - Assemble a team of volunteers/committee
  - Set goals for your campaign
  - Make a plan & set campaign dates
- During Campaign:
  - Be clear on campaign dates- host a kick-off
  - Share why it is important to give
  - Have fun!
- After Campaign:
  - Announce your campaign results to co-workers
  - Celebrate & thank donors
  - Share campaign results with United Way



# Additional Campaign Options

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- Rollover Campaign – The campaign rolls over over from one year to the next
  - Designations do not rollover
  - Communication with your employees is key, we can help
  - Seek support from new employees.
  - Consider a challenge to engage employees to up their donations
- ePledge
  - Electronic, online pledges
  - Customizable
  - Secure

Contact Rachael or Vickie to learn more.



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# Campaign Best Practices

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- Rally support from your CEO/Leadership
- Communication
- Special Events
- Incentives
- Engage Retirees
- Onboard New Hires
- Have Fun!



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# Best Practices

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Angela Gannon, Great Southern Bank



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When we work together, combining our lights (our resources),  
to serve towards the common goal of chasing away the pockets of darkness in our communities...

**We shine brighter UNITED!**



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# Ways to fundraise

- Corporate Giving
- Payroll Deduction
  - Paper Pledge Forms- NEW forms
  - ePledge – Our online giving platform
  - Rollover Campaign
- One-Time Gifts
- Workplace Special Events – Corn Hole/Ducks



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# Cup of Coffee a Month = \$22,000,000

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# It starts with

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...a success story



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# Campaign Resources

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- Campaign Folder Materials
- Campaign Center: <https://www.uwozarks.org/campaign/>
- Follow UWO on Social Media: @UWOzarks
  - #UWOzarks
  - #LiveUnited
- United Way Staff



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# Resource Reminder: 2-1-1

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A free and confidential 24-hour resource and referral hotline.



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# Thank You!!!

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## Campaign Contacts:

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