

# 2023 EMPLOYEE CAMPAIGN MANAGER TRAINING



United Way of the Ozarks



Special thanks to our lunch sponsor!

**HUSCH BLACKWELL**



# AGENDA

- Introductions
- Welcome & overview of United Way by Greg Burris
- 2023-2024 Campaign
- ECM Role & Responsibilities
- Campaign Resources
- ECM Idea sharing, Q&A
- Upcoming Dates
- Tour of Council of Churches





# **Your United Way Account Managers**

# Janelle Mitchell

Director of Resource Development



# Rachael Walsh

Vice President of Resource Development





**LET'S GET TO KNOW  
EACH OTHER.**

- **Introductions**
- **How long have you served as ECM**
- **What is your favorite thing about Springfield?**



# Greg Burris

President & CEO



# OUR FOCUS

- **Championing Children**
- **Providing Pathways out of Poverty**





# CHAMPIONING CHILDREN

Ensuring our community's children reach their full potential, by achieving milestones in development, education and health.



A man with a beard and mustache, wearing a black tank top, is holding a baby in his arms. He is looking down at the baby with a smile. The background shows a window with a view of a green landscape and some indoor plants.

# PATHWAYS OUT OF POVERTY

Helping people build brighter futures through stable housing, workforce readiness and financial literacy.



# OUR WORK

- \$2.1 million annual campaign
- Workplace giving
- We provide funding for **21 programs at 14 non-profit agencies.**

Cancer Fund  
Veterans Fund



# FUNDED PROGRAMS



# OUR WORK

Our programs serve  
individuals in **14**  
counties.

Barry, Christian, Dallas,  
Douglas, Greene, Hickory,  
Laclede, Lawrence, Polk,  
Stone, Taney, Texas,  
Webster and Wright



# OUR WORK

## Programs:

Emergency Food &  
Shelter Program

AFL-CIO Community  
Services



# OUR IMPACT LAST YEAR

**658** unhoused individuals were moved to **stable housing**.

**3,155** people received **mental health counseling**, regardless of ability to pay.

**60 families** saw a meaningful improvement in their **financial situation**.

**4,226** victims received **support** during a crisis.

**7,765** people gained tools to prevent victimization.



# OUR IMPACT LAST YEAR

**2,705 youth** were supported by a **consistent, caring** adult relationship.

**727 children** were given a **safe haven** from abuse or neglect.

**429 youth** achieved measurable gains in **academic success**.

**363 youth** with a diagnosed disability reached new **developmental milestones**.



# 2023-2024 CAMPAIGN



**Campaign Goal: \$2.2 million**

## **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

# CAMPAIGN KICKOFF



**AUGUST 29, 4:00-6:00 PM**

Join us at Farmer's Park Pavilion for an evening of drinks, appetizers and live music by Molly Healey! We'll celebrate our impact last year and recognize the achievements of our fundraising leaders. **Buy your tickets: \$25**

**Register for our city-wide cornhole tournament!**

12:30 PM, at Farmer's Park prior to the Campaign Kickoff.  
**\$50 per team** (*includes entry to Campaign Kickoff*)



## 2022 Pillar Award Winners

- Corporate Humanitarian of the Year: *SRC Holdings Corporation*
- Outstanding Community Service: *Council of Churches of the Ozarks*
- Outstanding United Way Volunteer: *Randy Presley, SMC Packaging Group*



## Top 10 Employee Campaign Managers

Jaime Craig, *Midwest Family Marketing*

Sarah Curl, *Penmac Staffing Services*

Reta Elliott, *Wilhoit Properties*

Gerad Fox, *City Utilities*

Leah Lee, *SRC Automotive*

Kenya Perryman, *Ollis/Akers/Arney Insurance & Business Advisors*

Randy Presley, *SMC Packaging Group*

Tracy Roberts, *EFCO*

Angie Way, *BRP Architects*

LaCinda Young, *Global Recovery Corp.*



# YOUR ROLE AS EMPLOYEE CAMPAIGN MANAGER

- 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



A photograph of two young boys, one Black and one White, smiling and hugging each other outdoors. They are in front of a chain-link fence with greenery in the background. The boy on the left is wearing a white t-shirt, and the boy on the right is wearing a blue t-shirt.

## STEPS TO A SUCCESSFUL CAMPAIGN

- **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



# CAMPAIGN BEST PRACTICES

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



# ADDITIONAL CAMPAIGN OPTIONS

- **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
- **MobileCause**
  - Electronic, online pledges
  - Customizable
  - Secure



# CAMPAIGN RESOURCES



- **Campaign Theme: Here.**
  - Here for bright futures.
  - Here for a better tomorrow.
  - Here for each other.
- **Printed Campaign Toolkit**
- **Online Media Kit:** Find themed digital posters, fundraising resources, social media posts, videos and email templates. Everything will be posted by the end of August.  
**[uwozarks.org/workplace-campaigns/](https://uwozarks.org/workplace-campaigns/)**
- **United Way Staff**

# DESIGNATION POLICY



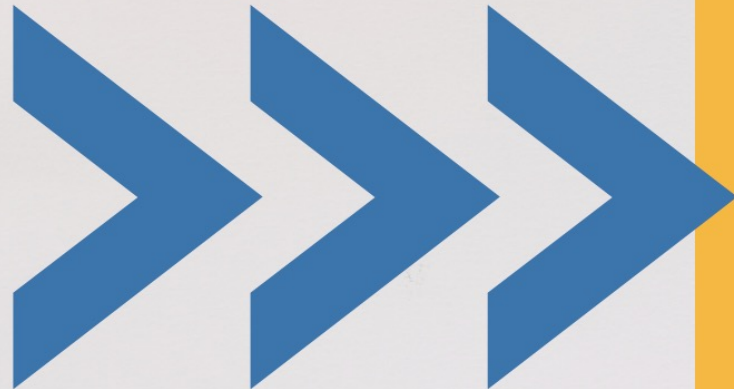
- The most POWERFUL way to give is the **Community Investment Fund**
  - Undesignated Gifts go into the Community Investment Fund
- Donors can designate to a specific United Way Fund
  - Upstream Fund
  - Safety Net Fund
  - Innovation Fund
  - Cancer Fund
  - Veterans Fund
- Write-In Designation to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

# WAYS TO FUNDRAISE

- Corporate Giving
- Payroll Deduction
- Paper Pledge Forms
- MobileCause – Our online giving platform
- Rollover Campaign
- One-Time Gifts
- Workplace Special Events – Cornhole, Flocking, Brockrito Food Truck, Greek Corner Moneytees, etc. ***Find more ideas in your campaign guidebook!***



If every employee in the  
Springfield Metro Area  
gave just...



we'd raise **\$22 million** for our  
community's most critical needs.

**UNITED, A LITTLE  
GOES A LONG WAY.**

# ECM SUCCESS STORIES



**Randy Presley, SMC Packaging Group**

**Leah Lee, SRC Automotive**



# IMPORTANT DATES:

August 29, 2023: Campaign Kickoff

September-December: Campaign Season (pledges made)

January 1, 2023: Payroll Deduction Begins

March 31, 2023: 2022 Campaign Ends (all pledges must be reported)

## Community Engagement:

- United for Greatness:
  - October 4 and 5, 2023
- Women United: Launch in early 2024
- Day of Caring: June 2024





# Thank You

---



## Campaign Contacts:

**Rachael Walsh**

*VP of Resource Development*

[rwalsh@uwozarks.org](mailto:rwalsh@uwozarks.org)

417-863-7700 x230

**Janelle Mitchell**

*Director of Resource Development*

[jmitchell@uwozarks.org](mailto:jmitchell@uwozarks.org)

417-863-7700 x259