



United in Giving **CAMPAIGN**

United in Giving Employee Campaign Leader Training Manual

2016

2016 Travis County United in Giving Campaign

Employee Campaign Leader Training Manual

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Mark Your Calendar!

Official Campaign Start Date Friday, September 16, 2016

Official Campaign End Date Friday, December 2, 2016

**Last Day to Turn in Envelopes, Pledge Forms, and Special Event Money
Friday, December 2, 2016**

Contact Information

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UWATX Campaign Manager Jeffrey King, Development Officer 512-225-0381

Jeffrey.king@uwatx.org

What is the United in Giving Campaign?

The Travis County United in Giving Campaign is the annual county-wide solicitation to Travis County employees to contribute to the charitable organization of their choice. Employee donations/contributions can be made in the form of volunteering time and/or giving money to any of the organizations through our fiscal agent, United Way for Greater Austin. This year, the goal is to generate 100% participation. Each department is urged to come up with creative ideas to generate as much money and voluntarism as possible in order to reach our goal!

What's New for This Year?

1. **Although it was our goal last year, too, we want to encourage 100% Participation** through financial donations and signing up to be a volunteer through United Way's Hands on Central Texas volunteer database.
2. **What is Hands on Central Texas?**
 - a. Hands on Central Texas is the affiliate United Way organization encouraging volunteer based philanthropy. We want to encourage 100% participation from Travis County and offer an option of a donation of time over money for employees. When you sign up you will see Austin events and activities looking for volunteers. You can find something that works for you or for a group of co-workers, family and friends, etc. and even contact them to add an event! More information is available through their website:
<http://www.handsoncentraltexas.org/>.
3. **We are trying to make philanthropy easier by partnering with United Way for Greater Austin, who will be an active part of our campaign planning!**
 - a. Just like last year, we are planning BIG and our 2016 goal is for 100% participation. If you cannot give your money, we encourage you to give your time and choose a project through Hands on Central Texas in which to volunteer.
4. **Check Out the New Website.**
 - a. Our extraordinary ITS team has set up the United in Giving Website, <https://www.traviscountytexas.gov/united> where employees and Department Employee Campaign Leaders (ECLs) will be able to view the latest information on Campaign events and our progress, view campaign videos, and find out general information about our United in Giving Campaign.

Why Is the United in Giving Campaign Such a Great Opportunity for County Employees?

It Offers Choice

Employees can choose to donate to many different charities, one single charity or donate their time to a registered nonprofit 501(c)(3) of their choice. United Way for Greater Austin and Hands on Central Texas offers several resources for easy and reliable financial and volunteer contributions. If you opt into payroll contributions, you will contribute to the charity/charities of your choosing every time you receive a paycheck. You also have the choice of making a one-time contribution, volunteer your time, or find creative ways to generate money for donations (i.e. bake sales).

If choosing a specific charity, annual contribution **must total at least \$50.**

It Provides Flexibility

Employees can divide up their contribution over 24 pay period or divide up their volunteer hours between multiple weekends.

It is Convenient

One form and one signature using payroll deduction allow employees to automatically have an amount deducted from their paycheck each pay period. And a one-time sign up with Hands on Central Texas allows for instant access to a database full of volunteer opportunities.

It is Cost Effective

One strong campaign aimed at benefiting several charities allows us to avoid high administrative costs and only asks employees for contributions once a year.

It Brings Us Together in Support of Our Community

It gives Travis County Employees the opportunity to work together, get to know one another better and have fun with the goal of giving to those around us in need – what a great way to strengthen our sense of community!

Frequently Asked Questions about the United in Giving Campaign

Why is it better to give through payroll contributions?

Several reasons. Payroll contribution allows you the ability to have your gift conveniently contributed in small amounts from each paycheck. Payroll contributions allow you to give more generously because the contribution is spread over an entire year. In addition, payroll contributions give nonprofit organizations a steady income throughout the year. This is important to them because it allows them to plan and implement successful programs with long-lasting impacts.

Who decides how my donations are distributed?

You do! Each county employee is encouraged to designate his or her gift to the nonprofit organization(s) of their choice.

Does UWATX have an administrative rate?

Yes, every registered 501c3 has an administrative rate. UWATX's current administrative rate is 12.78% and that is based reported expenses on their filed 2015 IRS Form 990; this amount determines what they can charge for the following campaign year. Their fee is also based on dollars received *not* dollars pledged. If you have more questions please feel free to contact your employee campaign leader or Jeffrey King at Jeffrey.king@uwatx.org .

Are contributions tax deductible?

Yes. Donations are fully tax deductible. The final pay stub of the year may serve as verification for the IRS.

Can employees give to more than one nonprofit organization?

Yes, you may select different charities by adding the address information and donation percentage on the donation form. Make sure the percentages of your gift for each charity total up to 100 percent. When choosing a specific nonprofit, your gift per charity must total \$50 per annual contribution. There is no minimum to give to the United Way general fund.

Who determines the County's policies governing the campaign?

The Travis County Commissioners Court approves campaign guidelines. Campaign oversight is provided by the Planning Committee.

Who is in charge of the campaign?

County employees. The employee Planning Committee is sponsored by Travis County Judge Sarah Eckhardt and Commissioner Gerald Daugherty.

If I am making a one-time donation who do I make my check out to?

You make your check out to United Way of Greater Austin. Your pledge form will indicate where your donation is intended. Make sure to include United in Giving Campaign in the “FOR” line of your check.

How does my contribution reach the intended nonprofit organizations?

After your contribution is made it is forwarded to United Way for Greater Austin, who distributes all contributions according to each contributor’s instructions. UWATX vets all 501(c)(3) organizations to ensure they are a legally operating nonprofit.

If I pledge today, when will my contributions begin?

Your first contribution will be made from your first paycheck in January 2017.

May I make an anonymous pledge?

Yes, as long as you understand that the County payroll department must know your identity in order to process your pledge. There is a box to check if you wish to be anonymous.

Can I be acknowledged for my gift?

Yes. The participating nonprofit organizations love to thank you for your support. However, you must provide your complete address to enable the organization to acknowledge your gift.

If I ask to be thanked, who will see my name?

Payroll (of course), the fiscal agent and the charity or charities you donate to.

Will my name be added to mailing lists?

Your name may be added to the mailing lists of charities to which you donate; however, your name is never shared or sold to any other organizations.

Can temporary employees make donations through payroll deduction?

No. Unfortunately, this option is only available for permanent employees. However, they can make a one-time contribution.

Are lotteries or raffle drawings allowed as special events to promote the campaign?

Any activity where one pays something of value for a chance to receive something of value could constitute the illegal act of gambling and is prohibited by law. However, the traditional "door prize" drawings where the chance to win is not conditioned upon paying anything of value (merely your attendance qualifies you to enter the drawing) are usually not considered illegal gambling.

If you are unsure about your special event idea, or if something qualifies as a raffle, please contact Jeffrey King at jeffrey.king@uwatx.org.

What is Hands on Central Texas?

Hands on Central Texas is the affiliate United Way organization encouraging volunteer based philanthropy. Participation in the 2016 Travis County campaign, like the 2015 campaign, offers an option of a donation of time over money for employees.

How do employees sign up?

Employees may visit <http://www.handsoncentraltexas.org/> to register and sign up for volunteer opportunities or if they want to get a team together for a group activity can contact Molly Hahn with United Way for assistance at (512) 225-0355 or molly.hahn@uwatx.org

How will we track volunteer participation?

The Hands on Central Texas website tracks participation by both person and organization. They will provide the United in Giving Planning Committee with a report of Travis County participation.

Please make sure to encourage employees when they sign up to provide their workplace location Travis County!

What if I already volunteer?

That's great! We would love to hear of how you contribute to your community! Make sure to go to <https://www.traviscountytexas.gov/united/volunteer> and fill out the volunteer form. We would love to add your hours to the total time that Travis County employees gave to their community in 2016.

Your Role in the Travis County Employee Giving Campaign

You and your department team have volunteered or been chosen as the best possible individuals to plan, organize and implement a successful 2016 Travis County Employee Giving Campaign. As the department Employee Campaign Leader, your duties may include:

- Setting a fundraising goal for your department or agency and creating a plan to reach or exceed it.
- Recruiting and coordinating a strong team of volunteers. Ideally, for every 20 to 30 employees in your department, it would be helpful to have one team member to help educate and assist potential contributors and personally ask colleagues for contributions.
- Attend the Employee Campaign Leader Training to learn effective methods for developing a successful campaign in your department.
- Sharing strategies and coordinating plans with the Planning Committee.
- Promoting County/Departmental kick-off events and other campaign activities.
- Educating fellow employees about the campaign and promoting payroll contribution as an easy and efficient method of giving.
- Educating employees about Hands on Central Texas- the volunteer network and database through United Way.
- Publicizing and promoting the campaign through email, voicemail, posters/signs and your personal creativity.
- Working with your team to coordinate and host group meetings, schedule agency speakers and provide your fellow employees with an opportunity to participate in the campaign.
- Working with your team to coordinate 100% distribution of pledge forms, brochures and other materials in your department.
- Working with your team to monitor campaign progress in your department. This might include employee meetings, campaign promotion, and results tabulation.
- Sharing the progress of your campaign and results with your department.
- Collecting pledge forms and completing report envelopes.
- Collecting and recording contributions from your special events.
- Coordinating the delivery of pledge forms and special event money with the County Treasurer's Office at 512-854-9365 or Cheree.Voigt@traviscountytexas.gov
- **Thanking participants in your department.**

Get Started

Recruit Team Leaders/Helpers

In departments of 50 or more employees, team leaders/helpers are essential. They serve as additional advocates for your campaign (more involvement means more support) and assist by promoting the campaign, coordinating and facilitating meetings within the agency/department, and distributing and collecting pledge forms.

Learn and Plan

- Review your department's campaign history.
- Determine the best way to conduct the campaign in your department.
- Establish a timeline or calendar so that the campaign is well planned and efficient.
- Use the timeline to monitor your progress and keep your team on track.

Get Needed Support

The Campaign Chairs and Committee provide support in planning the campaign, scheduling presenters, conducting trainings, assisting with employee meetings, and we are here to help! Feel free to email us at unitedingiving@traviscountytexas.gov

Develop Management Support

All Department Heads are encouraged to meet with their Department Campaign Leaders to develop a plan for their teams. Ask your department head and other management to be personally involved in the campaign process.

Encourage Management Involvement

- Provide time and resources for planning meetings and employee presentations.
- Have planning meetings to help develop strategies and plan the campaign.
- Support employee solicitations by encouraging payroll contributions.
- Present at employee meetings, emphasizing the department's support of the campaign.
- Write a personal letter or email to employees.

Set Goals

Increase Participation

- Develop campaign goals based on a percentage of participation in your department.
- Schedule employee group meetings to educate employees about the campaign.
- Ask your Department Head to get involved.
- Recruit and train enough team leaders/helpers to support your effort. A good rule of thumb: recruit one team leader for every 20-30 employees.
- Ask employees, either in group meetings or one-on-one, to give.
- Utilize agency speakers in employee meetings.
- Create a fun campaign theme and incorporate it into special events.

Increase Dollars Raised

- Promote payroll contribution (payroll contributions are usually three times more than one-time cash/check gifts.)
- Payroll deduction is a powerful tool; it allows employees to be involved in charitable giving year-round.
- Promote leadership giving.
- Utilize “dollar-buy” examples to promote payroll contributions.
- Set goals and challenge yourself to be creative and have fun.

2016 GOAL: 100% Participation

Commit to a 100% Participation

- Ask every person in your department to participate.
- Hand deliver printed materials to each individual.
- Encourage Employees to visit the Hands on Central Texas website at <http://www.handsoncentraltexas.org/>.
- Remind employees that they are able to donate their time if they are unable to give financially at this time.
- Recruit employees who have either been helped by an agency or volunteered at an agency to share their stories.

Promote Payroll Contributions at Special Events

Special events are useful in promoting the campaign. Events can be simple or elaborate. They help raise money, promote the campaign and boost your campaign fundraising.

Some examples of fundraising events are:

- **Food Events:** picnics, luncheons, breakfasts, ice cream parties, popcorn, box lunches, hot dogs, etc. Use food to liven up departmental meetings.
- **Special Events:** games, art shows, tournaments, dunking booths, pie tosses and jail-and-bails can add interest to a campaign.
- **Dress Down/Up Days:** Offer employees a chance for a dress-down or even dress-up (like a 1970s day!) if pledges are turned in by a certain day.
- **Prizes:** United Way has provided you with giveaways. Let them know if you need more! (*Lotteries or raffle tickets cannot be used.*)

Report Your Results

Return all pledge forms to the County Treasurer's Office frequently throughout the Campaign. The last official day of the campaign is Friday, December 2, 2016. The last day to turn in envelopes, pledge forms and special event money is Friday, December 2, 2016. Each department will receive a Campaign Envelope Cover Sheet, electronically and in hardcopy in this Manual. Pledge forms and donations should be submitted to the Treasurer's Office using a blank envelope with the Campaign Envelope Cover Sheet attached.

Pledge Envelopes: Turn in a weekly pledge envelope if you've received pledges and are in a large department. In addition, we ask that no department hold on to all pledge envelopes until the end of the campaign. Frequent reporting enables the campaign to track results, provide reports and eases the work load on the Treasurer's Office. It also makes it possible for checks and cash to be deposited in a timely manner in accordance with our auditing and reporting process.

Please see Forms and Instructions Section of this handout for a sample Campaign Envelope Cover Sheet.

Submit money and pledge forms in envelopes with *completed* Campaign Envelope Cover Sheets to:

County Treasurer's Office

700 Lavaca Street, 1st floor, 512-854-9365

Cheree.Voigt@traviscountytexas.gov

Forms and Instructions

Campaign Pledge Form Instructions

- **Step 1. Enter Your Donor Information**
 - Ask your colleagues to fill out the contributor information section completely. Please assure each employee that the information is confidential. Contributors who **DO NOT** wish to have their names used when recognizing those who donated to this campaign should check the anonymous box.
- **Step 2. Select Payroll Deduction or Direct Gift**
 - **Payroll deduction contributions** require name, employee ID#, phone number, and signature. Employees may choose one of the already calculated contribution options, or choose any other amount per pay period. He or she should:
 - Check one of the already calculated boxes, or
 - Fill in another amount in the spaces provided.
 - Enter Total Gift amount
- **One-time contributions made by cash, check, automatic credit card charge or stock** require name, phone number, and signature.
 - Checks or cash should be attached to the pledge form.
 - Checks should be made out to **“United Way for Greater Austin”- fiscal agent**
 - Automatic Credit Card Charge – follow instructions on donation form.
 - Enter Total Gift amount
- **Donor Designation Page (This page optional) Choose Where You Want Your Gift To Go**
 - Donors may choose to give to the United Way Greatest Impact Fund; or
 - Donors may choose to distribute their gift to a United Way for Greater Austin strategic program; or
 - Donors may choose to Restrict their donation to a nonprofit agency, please provide:
 - the Name,
 - ID Number (EIN – these can be easily found online) and Address of the organization (\$50 minimum annual contribution)
 - If you choose to distribute your gift to multiple nonprofits, please list them below or attach a sheet listing their Name, ID Number (EIN) and Address of the organization
- **Other**
 - Donors can keep a copy of the pledge form for tax purposes yet payroll contributions are reported on employee payroll reports.
 - Effective date: Payroll contributions begin with the first paycheck in January 2017.

PLEASE CHECK FOR ACCURACY!!! Please take a moment to complete a sample pledge form when you receive your materials. It is much easier to answer questions about the form as well as recognize errors when you have completed a form for example.

Be sure to fill out your own pledge form before asking your colleagues to participate. It's easier to ask if you're already a participant.

UWATX Pledge Form

Step 1: Please fill out donor information

United Way for Greater Austin only uses contact information to process donations and let you know how your investment is helping Greater Austin thrive.

Mr./Mrs./Ms./Dr. First Name M.I. Last Name

Home Address Apt. City State Zip

Preferred Email Personal Work Preferred Telephone Home Cell Work

I wish to remain anonymous in publications.

EIN: _____ Department: _____

Step 2: Please select how you plan to give

EASY PAYROLL DEDUCTION

I want to contribute the following each pay period:

- \$50 x _____ yearly pay periods
- \$25 x _____ yearly pay periods
- \$15 x _____ yearly pay periods
- \$10 x _____ yearly pay periods
- \$5 x _____ yearly pay periods
- \$ _____ x _____ yearly pay periods

TOTAL GIFT AMOUNT: \$ _____

DIRECT GIFT

Direct gift to be paid by:

Cash or check (Check No. _____) Please make check payable to United Way for Greater Austin.

Automatic Credit Card Charge

To make your donation with a credit card or debit card, visit our secure website at uwatx.org/EmployeeGifts or call 512.225.0363

Stock

To donate stock, please check the box and visit uwatx.org/stockgift for more information.

TOTAL GIFT AMOUNT: \$ _____



Thousands of donors, volunteers, supporters and funders contributed on behalf of United Way for Greater Austin—and our community—in 2015. And we've made a huge amount of progress to show for it. With your help, we can make even more progress in 2016 and beyond.

Here are some of the things our 2015 philanthropists helped us accomplish:

1,354

Middle school students received behavioral health, tutoring, mentoring, and quality after school and summer programming

NEARLY 500

Children began Pre-K3 thanks to local donors

14,207

Volunteers gave us more than 241,000 hours of their time

To see what impact other dollar amounts will make, visit:

UWATX.ORG/IMPACT

SIGNATURE _____

DATE _____

Donor Designation Page *[This page is optional]*

When you donate to United Way for Greater Austin, you have the option to direct the distribution of your gift. Please fill out the other side before completing this side. Please check the box on the left where you'd like to invest and indicate the amount in the corresponding purple box.

MAKE THE GREATEST IMPACT!

United Way for Greater Austin helps our community overcome barriers to economic opportunity and continue to thrive. We are solving problems not just for one person with one need, but creating solutions for a large community with large needs.

or -----

Target my support to UWATX's strategic programs:

Get children ready for kindergarten

Our Success By 6 program works to make sure every child is ready for kindergarten by improving child care, providing parent education, and supporting early literacy services.

Support middle school student success

Our Middle School Matters program provides support services proven to positively impact students, ensuring they are on track for high school success.

Help families become financially stable

Our financial stability work focuses on strengthening educational and workforce support for families using the "two-gen" approach: addressing needs of both children and their parents together to promote upward economic mobility for this generation and the next.

Connect community members to important services

Our health work includes the United Way Navigation Center, which helps callers access health and human services, and supports our work in education.

or -----

Restrict my dollars to a nonprofit agency

UWATX will send your gift, your name and address unless otherwise specified.

Minimum \$50 annually*

Nonprofit 501(c)3 Organization Name

Employer ID Number (EIN)

Address (Required)*

City

State

Zip

Please do not release my information to my restricted agency.

TOTAL

Please make sure this matches the total from the front page.

MY GIVING SOCIETIES

Please check the box for any groups you would like to join or find out more about.

Century Investors

I gave \$2,500 or more. Century Investors contribute \$2,500 or more annually. Members who give \$10,000 or more annually are additionally recognized as Tocqueville Society members. (Interested in our Step-Up Program? Visit uwatx.org/CenturyInvestors to learn more.)

Leadership Givers

I gave \$1,000 or more to UWATX and/or a UWATX program.

Women's Leadership Council

I gave \$1,200 or more to UWATX and/or UWATX's Success By 6 program.

Loyal Contributor

I have been giving to United Way for 10 years or more.

Year of first gift: _____

Young Leaders Society

I gave \$250 or more to UWATX and/or UWATX's Middle School Matters program and I am under 40 years old.

SIGNATURE _____

DATE _____

* If you do not provide the address of the nonprofit organization or your gift is less than \$50, your donation will be redirected to UWATX.

If an agency you designate to is not a qualified 501(c)(3) tax-exempt organization, if the information is incomplete or if your designation is less than \$50, your gift will be redirected to United Way for Greater Austin in support of our work in the community. United Way for Greater Austin is a nonprofit organization as defined by section 501(c)(3) of Internal Revenue Service Code, Tax ID 74-1193439. Gifts made to United Way for Greater Austin may be tax-deductible. No goods or services were provided in exchange for this contribution. Consult your tax advisor for more information. For contributions made through payroll deduction, refer to your paystub or payroll office for your total gift amount. United Way for Greater Austin honors donor intent. Please email giving@uwatx.org if you have any questions or concerns.

Campaign Envelope Instructions

Please prepare a cover sheet for each campaign envelope prior to submitting it to the Treasurer's Office (700 Lavaca St., 1st floor). Complete all applicable information, being careful to print clearly.

- **The total amount entered on the envelope must match the contents.**
- **Do not include totals from previous campaign envelopes.**
- **Complete all information, printing clearly** to reduce errors in processing.
- **Attach checks to individual pledge forms** when someone makes a gift by check.
- **Checks should be made out to "United Way for Greater Austin." fiscal agent**
- **Attach cash gifts to individual pledge forms** when someone makes a gift by cash.
- **Please check your totals twice.** Sometimes it helps to have another person check your totals before you deliver the envelope.
- **Include your name, department, and phone number** so that you can be reached easily if there are any questions or discrepancies in your envelope.
- In the first column, "No. of GIVERS", list the number of payroll contribution givers, number of one-time Cash/Check givers, and the number of other givers. This helps us keep an accurate accounting of our participation rate.
- The second column, "Total PLEDGES", should include the total \$ amount of all payroll contribution pledges, as represented by pledge forms in this envelope.
- The third column, "Total CASH/CHECKS", should include the total amount of all actual money by category (Special Events, One-Time Cash/Check gifts and Other contributions represented by pledge forms in that particular envelope.
- In the last row of the table, be sure to indicate the Total No. of Employees Giving, as well as the Total Contributions in all categories in this envelope, including payroll contributions, one-time cash/check contributions, and special event/other money.
- **Make a copy of each reporting envelope** for your records.
- **When completed, attach the Campaign Envelope Cover Sheet to a plain manila envelope containing the pledge forms, cash, and checks you have collected.**
- **Deliver completed envelopes to the County Treasurer's Office** (512-854-9365 or Cheree.Voigt@traviscountytexas.gov).
- Be sure to turn in your envelopes frequently during the campaign.
- **Please turn in all envelopes as soon as possible. This is crucial for reporting and auditing purposes.**

2016 Campaign Envelope

Instructions

- Print out and make as many copies as needed. One Cover Sheet must accompany every envelope.
- Complete all information. Print clearly to reduce errors in processing.
- Envelope total must balance with envelope contents.
- Do not include totals from previous campaign envelopes.
- When completed, attach this sheet to a plain manila envelope containing the pledge forms, checks, and cash collected.
- Deliver envelope to the County Treasurer’s Office.

Department (please print) _____

Department Campaign Leader’s Name and Title (please print) _____

Department Campaign Leader’s Signature _____ () Telephone Number _____ Date Submitted _____

Total Enclosed In This Envelope:

Category	No. of Givers	Total Pledges	Total Cash/Checks
Payroll Contributions			
Special Events			
One Time Cash/Check Gifts			
Other			
Total No. of Employees Giving		Total Contributions in All Categories	

FOR CAMPAIGN CHAIR USE:

Envelope Received in Office: Date _____ Initials _____

Cash and Checks to Fiscal Agent: Date _____ Initials _____

Entered in database: Date _____ Initials _____

NOTES/OTHER: