

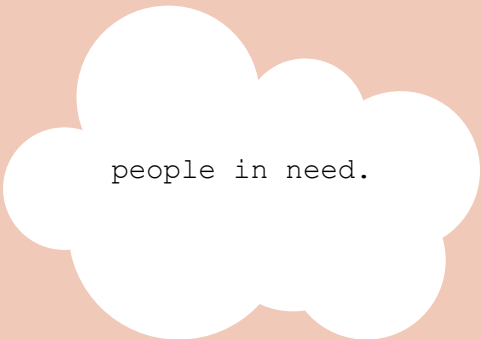
coordinator guide

state combined giving campaign

online donations: <http://mkegiving.org>



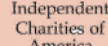
MILWAUKEE
PARTNERS IN GIVING



people in need.



COMBINED
GIVING
CAMPAIGN



Campaign Background

Milwaukee Partners in Giving (State and University Combined Giving Campaign and also known as SECC) represents 11 different umbrella groups: America's Charities, Community Health Charities of Wisconsin, Community Shares of Greater Milwaukee, EarthShare, Global Impact, Hunger Relief Fund of Wisconsin, Independent Charities of America, Neighbor to Nation, United Performing Arts Fund, United Way of Greater Milwaukee and Wisconsin Environmental Education Foundation.

State employees have many options for donor choice both locally, nationally, and internationally. Donor choice is a personal decision, and all organizations are vetted to ensure that they meet state compliance requirements. Each year these groups go through a vigorous application process. Rest assured, your money is going to a worthy, legitimate nonprofit organization.

History of Campaign - 2013 results

	Total Campaign	
Dollar Raised	\$198,251	
Participation	10.6%	
Average Gift	\$294	
*Leadership Gift	39	*\$1,200+

Did You Know?

- UWM accounts for 61% of the total Milwaukee Partner's in Giving campaign and 70% of all leadership donors.
- The #1 reason people do not donate is because they were never asked.
- It's hard to ask people for money, but you are not asking for yourself, you are asking for someone who cannot.
- Most charities have costs to fundraise, and the Milwaukee Partners in Giving is a very efficient way for them to reach a wide base of State employees without costs to advertise, promote, direct mail, or other means. This allows the charities to focus on their mission.

"We make a living by what we get, but we make a life by what we give." Winston Churchill

The Who, What, Where, When and How's of the Campaign

WHO: The campaign helps various charities throughout Milwaukee, Wisconsin, nationally and internationally through America's Charities, Community Health Charities of WI, Community Shares of Greater Milwaukee, EarthShare Wisconsin, Global Impact, Hunger Relief Fund, Independent Charities of America, Neighbor to Nation, United Performing Arts Fund, United Way of Greater Milwaukee and Wisconsin Environmental Education Foundation. All the charities are vetted in Madison annually to assure they comply with regulations.

The Milwaukee Partners in Giving Board meets monthly to plan the campaign, training, marketing, budget control and special events.

United Way of Greater Milwaukee is the campaign's fiscal agent and completes an annual audit as well as adheres to campaign controls regarding accounting practices and regulations.

Coordinators are the backbone of the campaign and are the reason the campaign is successful. One on one asks by peers is the most effective fundraising model.

WHAT: An annual Wisconsin State employee workplace giving campaign.

WHERE: Each State agency/department within the Milwaukee area. Madison and Statewide employees run separate campaigns.

WHEN: Annually. In 2014 the campaign runs October 6 – November 21. Year round fundraising and awareness is encouraged.

HOW: Review this guide for information that will be helpful in running a successful campaign.

Check our new and improved website at www.mkegiving.org for additional information and resources.

The Coordinator's Role

Duties

- Plan, coordinate, and promote the campaign.
- Implement best practices.
- Motivate donors and provide them with the opportunity to give.
- Encourage Online Giving option at [www. mkegiving.org](http://www.mkegiving.org).

Benefits

- Showcase leadership and project management skills.
- Promote networking opportunities with colleagues at various levels of your organization, both internally and externally.
- Create a positive impact in the community.
- Increase personal knowledge about community issues and the value of giving.

Routine

- Develop an effective campaign plan, including dates, goals, etc.
- Request speakers and materials from campaign manager.
- Distribute materials and pledge forms to colleagues.
- Host campaign kickoff and recognition events.
- Promote the campaign throughout coordinator organization.
- Make a personal ask to coworkers.
- Turn in report envelope(s) with pledge forms.
- Thank donors and volunteers.
- Evaluate campaign and make recommendations for next year.
- Complete the workplace drop report and return to Loaned Executive.

Year Round Involvement

- Include updates in newsletters, on your intranet, or bulletin boards throughout the year.
- Encourage leaders to reference campaign updates.
- Learn more about the various charities and nonprofits. Invite representatives of agencies to speak all year.
- Get involved with a group by volunteering. Check mkegiving.org for current volunteer opportunities.

"The best way to find yourself is to lose yourself in the service of others."

Best Campaign Practices

- 1. Gain leadership support and engagement**

Although campaigns are employee driven, the best campaigns have the leadership support and encouragement from the top.
- 2. Establish campaign infrastructure**

Choose a timeframe, routines, and communication process.
- 3. Understand coordinators are the key to success**

Whether you volunteered or were “volun-told,” coordinators make or break the campaign. If the solicitation area exceeds 50 employees or covers multiple locations, it is recommended to receive additional support.
- 4. Embrace training**

If you were unable to attend the training and strategic session, please review administrative tasks and how to ask on our website or contact a board member for assistance.
- 5. Promote the campaign**

Implement whatever promotion methods are appropriate for the workplace culture and setting, such as posters and email updates.
- 6. Connect to the charities**

Charity speakers are effective and inspirational. A five to fifteen minute speech in a workplace can shift opinion and motivate. Consider an agency fair where a group of charities attend the kickoff event or set up a table during lunch.
- 7. Make it fun**

Use themes, special events, and food to increase reception and appeal of giving. Easy ideas are “jeans day” where folks pay to wear jeans or a bake sale.
- 8. Ensure information flows**

Keep campaign participants and coworkers informed. Repeat messaging and let people know how the campaign is going.
- 9. Foster year round engagement**

Share stories and volunteer opportunities all year long. Or, hold a special event outside of the campaign cycle.
- 10. Report results and acknowledge participants**

Share your campaign results. Send out a post-campaign survey to help improve next year’s campaign. And make sure to thank everyone who gave or helped you.

Online Giving: www.mkegiving.org

We encourage state employees to give online. Pledging online keeps a “real time” record of the giving and saves money for the campaign.

- Encourage coworkers to give online this year.
- Go to www.mkegiving.org and review how to give online.
 1. Click on the Pledge Online button.
 2. Follow the steps to register and pledge.
 3. Choose your workplace location.
 4. Search for charities of your choice.
 5. Choose method of payment, credit card, or payroll deduction if your location allows.
- Find the online donation site at www.mkegiving.org.
- Utilize the Post-It notes to help advertise the Online Giving option. Put on coworkers’ computer screens, break rooms, mail boxes, etc.

Why Give Online?

1. **Fewer errors** occur without handwritten forms.
2. **No math required.** The computer does it all.
3. **Eco-friendly** process means less printing and that more money goes directly to the charities.
4. **Better efficiency.** Reduced data entry means less time spent compiling paper forms and saves on overall campaign expenses.
5. **Credit card option** exists for a one time donation using VISA, MasterCard, or Discover.
6. **Confidential** submission ensures your coordinator knows you pledged online, but not how much.
7. **Convenience.** Pledge when you want.
8. **Safe online payment** on a secure site.
9. **Quick.** Pledge and submit.
10. **Easy** thanks to intuitive page navigation and simple instructions.

"Never doubt that a small group of thoughtful, committed citizens can change the world. Indeed, it's the only thing that ever has."

-Margaret Mead

Steps of a Successful Ask

Watch the “How to Ask” video on our website at mkegiving.org.

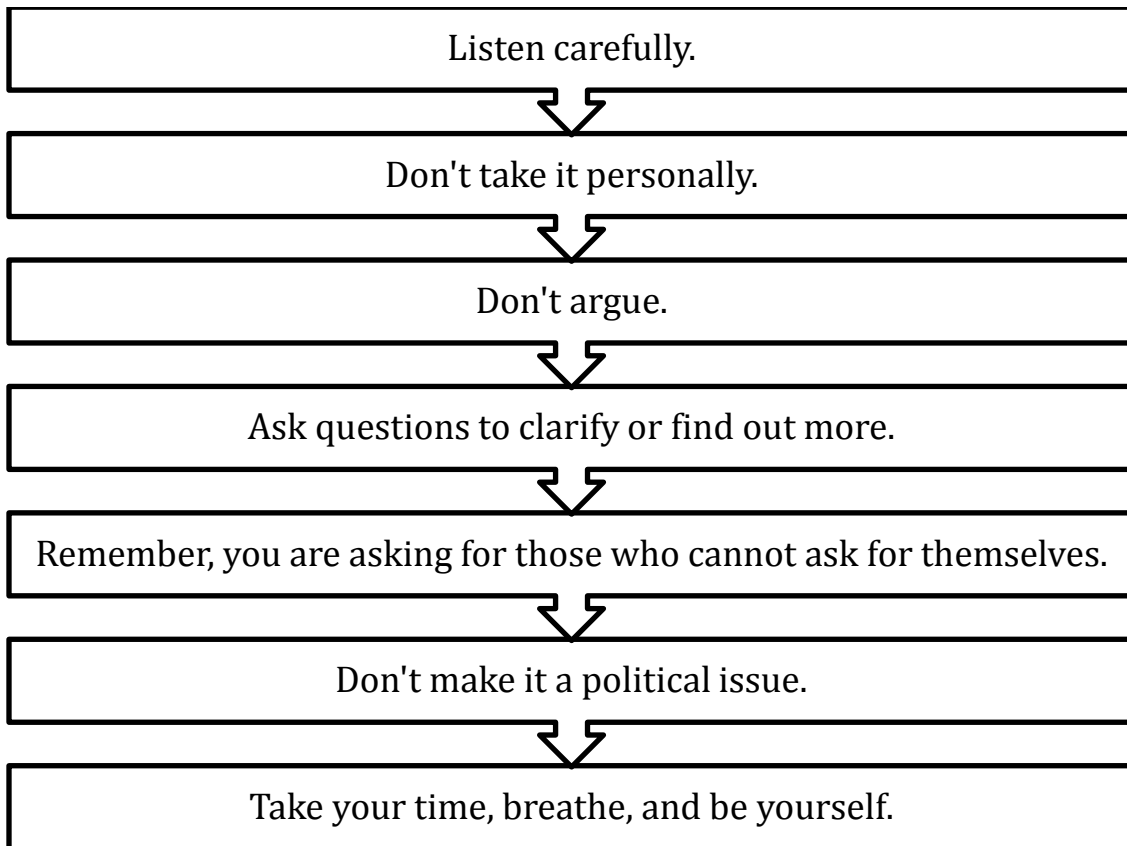
- 1. Set the example**
 - Make your pledge first and then ask the same of the leadership in your organization.
- 2. Be knowledgeable**
 - Review the materials in advance.
- 3. Formulate a plan**
 - Start the discussion on a positive, friendly note.
 - Explain the purpose of the visit.
 - Find out what he or she knows about the campaign.
 - Tailor the approach to each individual.
 - Utilize an agency speaker and/or employee testimonial at a meeting to share a story of how one of the organizations directly helped a member of the community.
- 4. Ask for the pledge**
 - Ask each person. Many do not consider an email or meeting as a personal ask. Exercise your judgment.
 - With new givers, ask for a first time gift.
 - For annual givers, thank them for past support and encourage an increased gift.
 - Remember you are not asking for yourself. You are asking for someone who needs help.
- 5. Answer questions and handle concerns**
 - Know your materials and answer questions honestly.
 - If you do not know the answer to a question, let the donor know you will find out. Ask a board member for clarification.
 - Recognize that some donors have real concerns. People have a right to give or not to give.
 - Do not argue. Still, help dispel any misconceptions.
 - Do not take a “no” personally.
- 6. Say thank you**
 - Regardless of what the donor decides, say thank you.

How to Overcome Objections

Provide facts to dispel rumors. The Combined Giving Campaign is a highly efficient and effective way for charities to fundraise. It saves them resources that might otherwise be spent on marketing and advertising. It also prevents state employees from being contacted by each worthwhile organization.

Most companies and public sector systems have one-time workplace giving campaigns. This campaign has a long history, established by state employees rather than management or elected officials.

What can you do when someone wants to argue or ask difficult questions?



How to Complete a Pledge Form

Sample form on following page

With an understanding that not all state employees have computer access during the work day, we still offer paper pledges. Follow these steps to complete a paper pledge.

1 Provide your information

Print your personal information. Please print legibly. Sign if you select payroll deductions.

2 How do you wish to give?

With the paper pledge form, you may donate by payroll contribution, cash, or check. Credit card payment is acceptable for online donations only.

Use line 1 to make a payroll contribution. Contributions will begin with the first pay period of January 2014.

If you wish to donate cash, use line 2. If you wish to donate with a check, use line 3. Make checks payable to "United Way-Fiscal Agent."

Complete the "Total Pledge" line by adding the amounts on lines 1, 2, and 3.

3 Acknowledge name release

Your information will be provided by April 1 to the agencies, and only the agencies, designated on your pledge form unless you check the box asking the campaign to not release your name.

4 How would you like to help?

You can decide how your contribution is allocated by directing your gift to any combination of umbrella groups, individual charities, or the overall campaign.

- Use box **A** on the pledge form to contribute to one or more federation(s). Specify the amount(s) on the appropriate line(s).
- Use box **B** to make a contribution to an agency listed in the donor brochure.
- Use box **C** to make a general contribution to all federations.

2014 MILWAUKEE PARTNERS IN GIVING

State and University Employees

Please Print

LAST NAME FIRST NAME DEPT. CODE EMPLOYEE I. D.

1 Your Signature and Today's Date

SIGNATURE DATE EMAIL (optional)

STREET ADDRESS CITY STATE ZIP

2 How do you wish to give?



A. Payroll Deduction (Begin with the first paycheck in January 2015)

\$ _____ x _____ = \$ _____
Amount Per Paycheck Number of Paychecks

B. Cash (attach) _____

\$ _____

C. Check (payable to United Way-CMO)

\$ _____

TOTAL DONATION
(must equal the total of all amounts in part 4)

\$ _____

Thank You!

3 Name Release/Acknowledgement

Your name will be provided to designated agencies, unless you check the box below:

Please **DO NOT** release my name to any designated agencies.

4 How do you want to help?

Please designate where your donation should go to support vital human services. You may donate to any combination of the following:

- one or more specific federations under Part A or
- one or more specific agencies under Part B or
- all federations under Part C

A. Federations Enter the total annual amount for each group.

	United Way of Greater Milwaukee 3000 \$		Global Impact 0900 \$
	WI Environmental Education Foundation 1000 \$		Hunger Relief Fund of Wisconsin (Administered by Hunger Task Force, Inc.) 0700 \$
	America's Charities 0400 \$		Independent Charities of America 2000 \$
	Community Health Charities 4200 \$		Neighbor to Nation 0500 \$
	Community Shares of Greater Milw. 4600 \$		United Performing Arts Fund 4500 \$
	EarthShare 0900 \$		

B. Specific Agencies Enter the code number and the total annual amount for each agency of your choice.

\$ _____	\$ _____
\$ _____	\$ _____
\$ _____	\$ _____

C. General Contribution Enter the total annual amount you want distributed among all federations.

\$ _____

No goods or services were provided in exchange for this contribution. Keep a copy of this form for your tax records. Payroll deduction pledges also require a copy of your pay stub or other employer document showing amount withheld. Consult your tax advisor for more information.

Add Designations A, B and C → \$ _____
(must equal total donation in part 2)

TOTAL DONATION

Online Giving Now Available: mkegiving.org

How to Complete a Report Envelope

Sample report envelope on following page

2 Submit payroll office information

Please make copies of all donors that have selected payroll deduction and send to your payroll offices. If your payroll office is at a different location, please specify correct address.

4 Provide total number of employees

Specify the total number of employees (full-time, part-time, etc.)

5 Add pledge totals

Please ensure cash or checks are securely paper clipped to the donor's pledge form, not stapled.

- A. Tally the number of non-payroll donations (cash, check, credit card) and the total dollar amount.
- B. Tally the number of payroll pledges and the total dollar amount.
- C. Tally A and B.
- D. Tally total dollar amount from any special events.
- E. Tally C and D.

6 Specify report prepared by

Please provide the information of the person who prepared the envelope.

Attention

The Loaned Executive or board member cannot pick up the envelope unless it is completed and sealed. When the Loaned Executive picks up the envelope, he or she will sign and date over the seal, as will the Coordinator or person giving the envelope to the Loaned Executive.

The Coordinator will make and retain a copy of the front of the envelope.

Envelope# _____ of _____

Employees' Combined Giving Campaign Report Envelope

<i>for UWGM use only</i>		
City 816033	County 816330	MPS 816082
Other 837591	SECC 816066	MATC 816132

FISCAL AGENT:
United Way of Greater Milwaukee
225 West Vine Street
Milwaukee, WI 53212-0971
P 414.263.8100
www.unitedwaymilwaukee.org

Andar # _____	<i>for UWGM use only</i>
ENVELOPE TYPE	
A	W

PLEASE COMPLETE ITEMS 1 THRU 6

for UWGM use only
Acct #: _____

2 Please enter payroll statement address (if different than #1)

1 Name and Address

Contact Person _____

Address _____

City, State _____

Zip+4 _____

3 Is this your FINAL Campaign Report? Yes No

4 Total employees (not FTEs) at organization _____

5 Contributions Enclosed **DO NOT** include previously reported pledges.

Type of Contribution	Number of Donors	Total Amount Pledged	Payment Enclosed
A. Non-payroll Pledges			
B. Payroll Pledges			
C. Employee Total			
D. Special Event			
E. GRAND TOTAL (Add lines C thru D)			

6 Report Prepared by (PLEASE PRINT) _____ Signature _____

Telephone No. _____ Email Address _____ Date _____

Picked up by (please print) _____ Date _____

PLEASE RETURN ALL ORIGINAL COPIES OF PLEDGE CARDS AND CASH OR CHECKS IN ENVELOPE.
THANK YOU!

for UWGM use only

A: _____ I: _____ E: _____ C: _____

Campaign Contacts

Hal Ackerman

Division of Vocational Rehabilitation
(414) 267-3183
hal.ackerman@dwd.wisconsin.gov

Ann Marie Alvarez, Chair

WI Dept. of Revenue
(414) 227-4982
annmarie.alvarez@revenue.wi.gov

Mary Jane Anttila

Region 3 WI Dept. of Corrections
(414) 229-0576
mary.anttila@wisconsin.gov

Ursula Borowiak

Dept. of Workforce Development
(608) 224-2800
ursula.borowiak@dwd.wisconsin.gov

Mary Cayan

State Public Defender
(414) 227-4764
cayanm@opd.wi.gov

Terilynn Geissner

WI Dept. of Health Services
(414) 289-6018
terilynn.geissner@wisconsin.gov

Joe Krueger

WI Dept. of Corrections
(414) 265-7747
joseph.krueger@wisconsin.gov

Faith Lemons

WI Dept. of Revenue
(414) 227-4440
faith.lemons@revenue.wi.gov

Cheryl Quinn

WI Dept. of Children & Families
(414) 343-5743
cheryl.quinn@wisconsin.gov

Luis Saavedra

UWM Roberto Hernandez Center
(414) 229-6156
luiscs@uwm.edu

Courtney Schoen

WI Dept. of Corrections
(414) 874-1600
courtney.schoen@wisconsin.gov

Sally Seeger

WI Dept. of Natural Resources
(414) 263-8513
sally.seeger@wisconsin.gov

Dawn Stachowiak

State Public Defender
(414) 266-1180
stachowiakd@opd.wi.gov

John Stewart

UWM Athletics/Development
(414)229-5634
jstew@uwm.edu

May Vang

WI Dept. of Natural Resources
(414) 263-8565
may.vang@wisconsin.gov

Ann Marie Wooden

Milwaukee Northeast
(414) 438-4594
annmariea.wooden@dot.wi.gov

Kathy Miller

United Way of Greater Milwaukee
(414)263-8150
kmiller@unitedwaymilwaukee.org

Alayna Pieschek

Loaned Executive – United Way
(414)263-8186
apieschek@unitedwaymilwaukee.org

Campaign Timeline Guide

Task	Projected Date
Receive campaign materials:	
Attend coordinator kickoff:	
Meet with leadership and gain support:	
Know campaign goal and participation goal:	
Determine campaign dates:	Kickoff: End Date:
Host a campaign kickoff:	
Promote campaign throughout department:	
Promote online giving:	
Visit the new and improved campaign website for updates and ideas:	www.mkegiving.org
Turn in your final envelope to United Way, 225 W. Vine St.	By November 21
Complete the coordinator scorecard:	By December 1
Promote online auction:	To be determined
Coordinator scorecard drawing:	December 8
Thank all donors and announce results to staff:	End of campaign
Attend the awards celebration:	To be determined, typically in January



Name: _____

Phone: _____

Dept: _____

Email: _____

points	total	challenges
10		#1 Attend Training
10		#2 Donate an item or service from your department for the campaign or Online Auction
10		#3 Promote the campaign by hanging posters, post-its, emails and other great ideas you have
10		#4 Push Online Giving
20		#5 Ask all your co-workers
20		#6 Increase participation
10		#7 Meet or exceed goal
5 per event		#8 Hold a special event(s)
5		#9 Thank everyone and share results
TOTAL POINTS:		

How does the scoreboard work?

- Complete each challenge and score yourself (honor system)
- Return the completed sheet after your campaign is complete, no later than December 1, 2014.
- Scan and email to Kathy Miller, kmiller@unitedwaymilwaukee.org or fax to 414-263-8150

Prizes and recognition for everyone who returns the Scorecard!

Thank You. You Make It Possible!

Underneath everything we are,
Underneath everything we do,
We are all people.

And when we reach out a hand to one,
We influence the condition of all.