

Lend a helping hand



2019 CAMPAIGN TRAINING

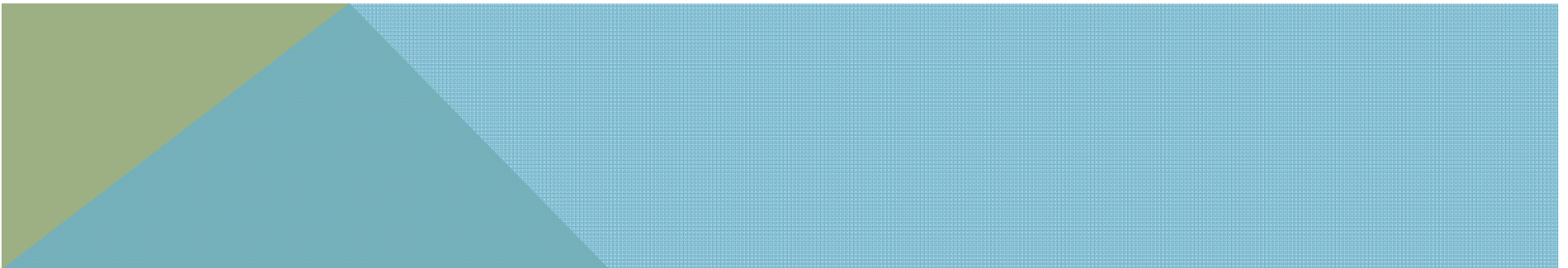
**UTAH STATE EMPLOYEES'
CHARITABLE FUND CAMPAIGN**

Thank you for participating in the 2019 campaign!

Training Overview

Allan Liu, Board Vice Chair:

- Campaign history, dates and details
- Coordinator duties
- Tour of the website

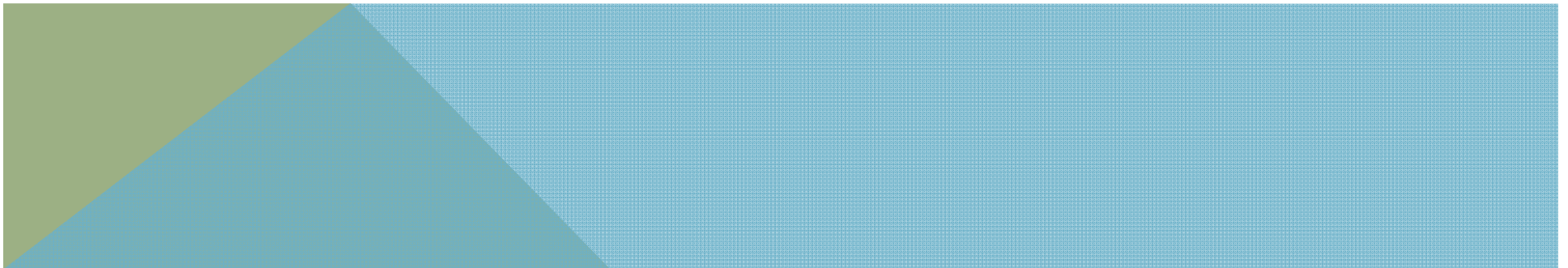


Thank you for participating in the 2019 campaign!

Training Overview

Brian Brand, Board Treasurer:

- Donating through the USECF website
- Campaign completion and follow-up
- USECF Frequently Asked Questions

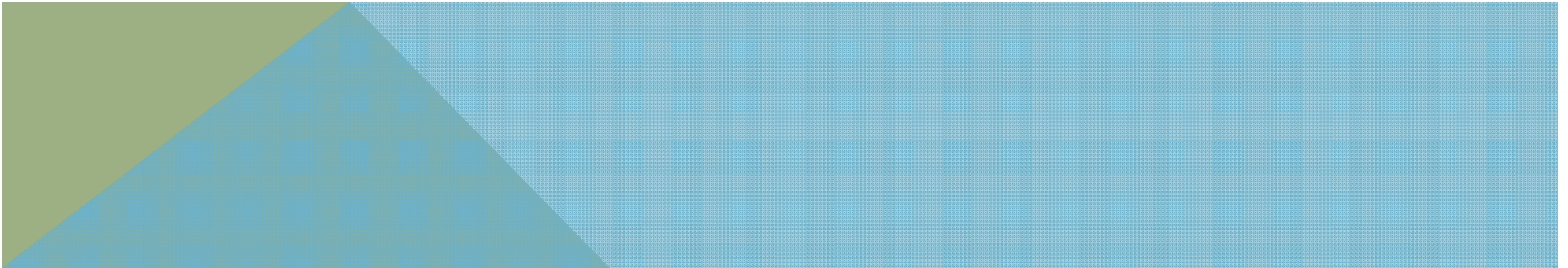


Thank you for participating in the 2019 campaign!

Training Overview

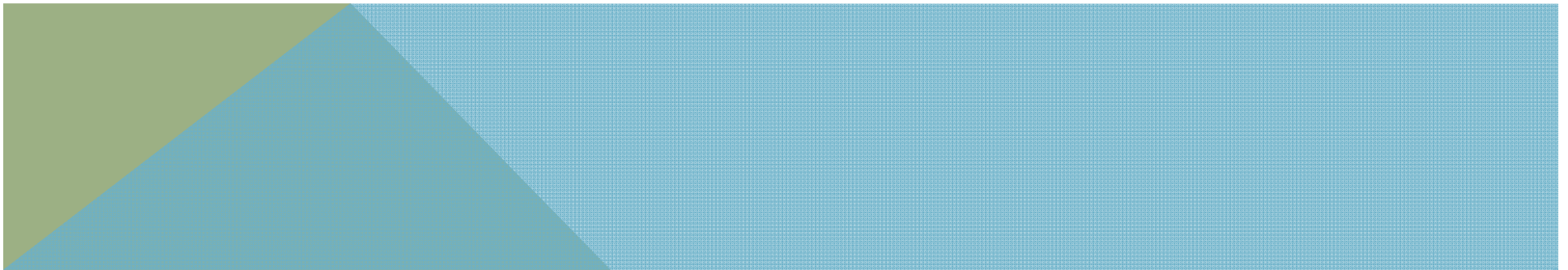
Catherine Higgins, Board Secretary:

Promoting the message: Lend a Helping Hand





CAMPAIGN HISTORY, DATES & DETAILS



USECF HISTORY



- Started by Utah Governor J. Bracken Lee in in 1955
- The Board of Directors oversees fund year-round
- All charities must comply with strict federal, state laws and be registered with Utah Department of Commerce

Governor J. Bracken Lee with a Red Cross employee – used by permission, Utah State Historical Society.

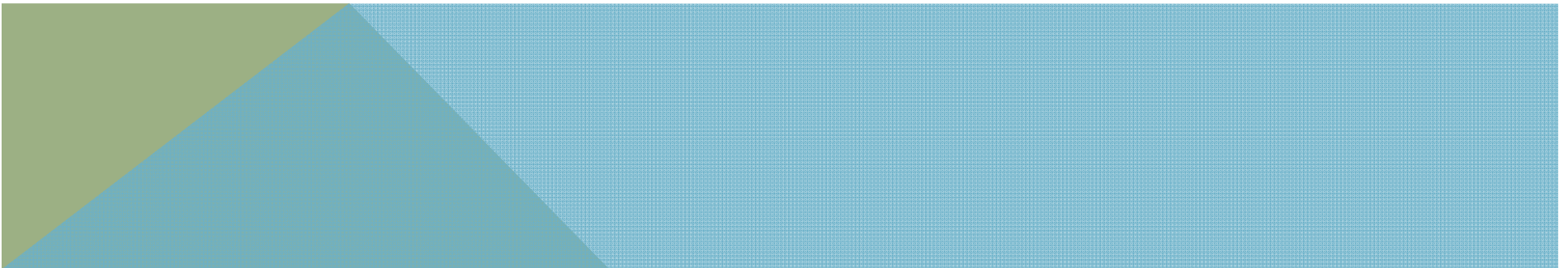
2017 Totals:

Total amount given = \$295,802

Participating employees = 1,023

We can do better!

More information: usecf.utah.gov

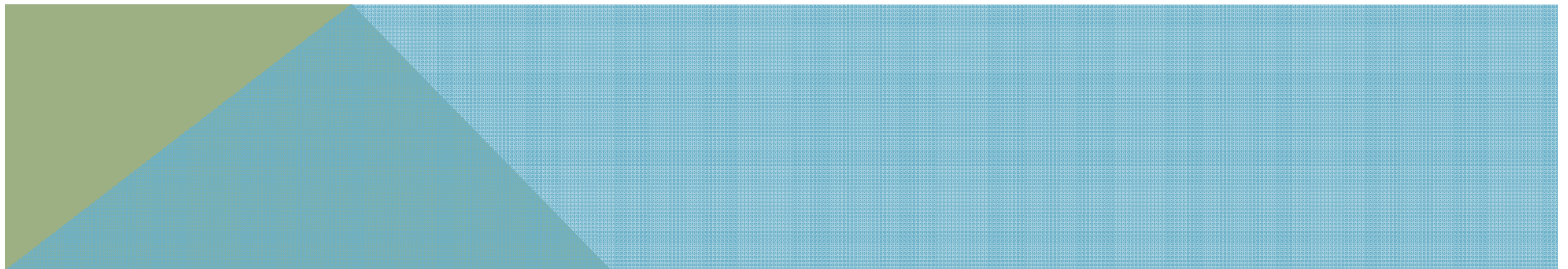


2019 CAMPAIGN THEME & TIMELINE

Campaign theme: *Lend a helping hand*

Campaign timeline:

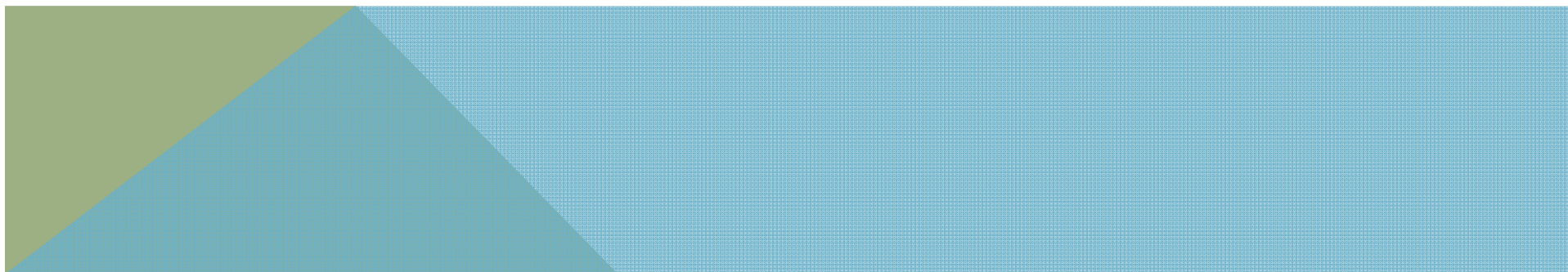
- Thursday, September 13, 2018 – Campaign Kickoff Event
- Monday, September 24, 2018 – Campaign Begins
- Friday, November 2, 2018 – Campaign Ends
- Friday, November 9, Campaign Reports Submitted



2019 CAMPAIGN THEME & TIMELINE

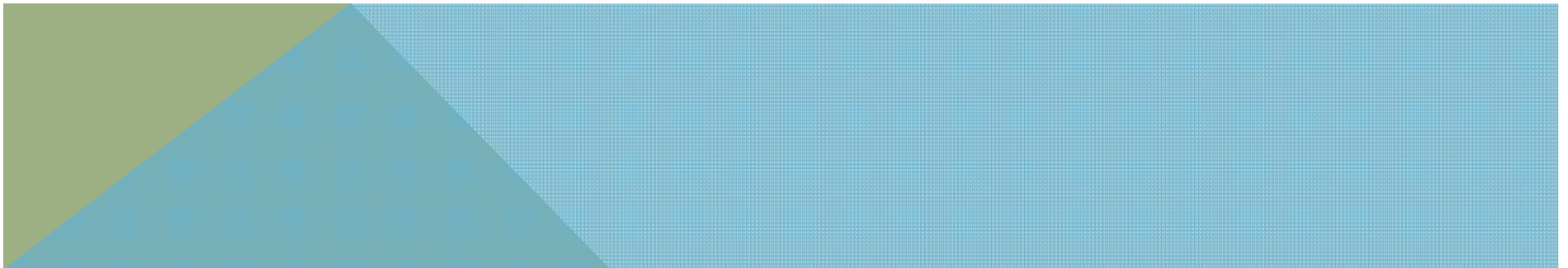
Campaign theme: *Lend a helping hand*

Website Tour: USECF.utah.gov





COORDINATOR FINANCIAL DUTIES & RESPONSIBILITIES



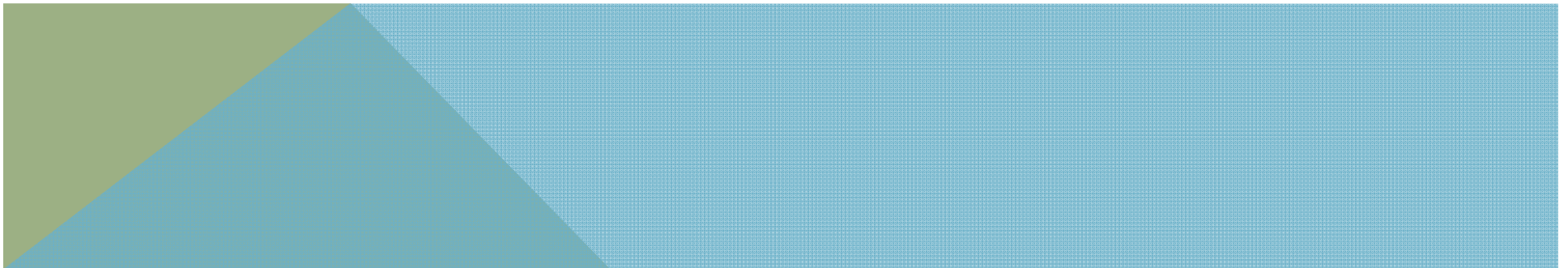
DEPARTMENT COORDINATOR DUTIES

Your department's campaign begins with you!

Department coordinator responsibilities:

- Answer questions
- Monitor the donation process in your department
- Provide status reports to your department
- Deliver all forms and one-time payments to the Division of Finance in-person

ALL THE INSTRUCTIONS FOR THE ONLINE DONATION SYSTEM AND THE FINANCIAL DUTIES AND RESPONSIBILITIES CAN BE FOUND ON THE USECF WEBSITE: [2019 CAMPAIGN, FORMS AND TRAINING](#)

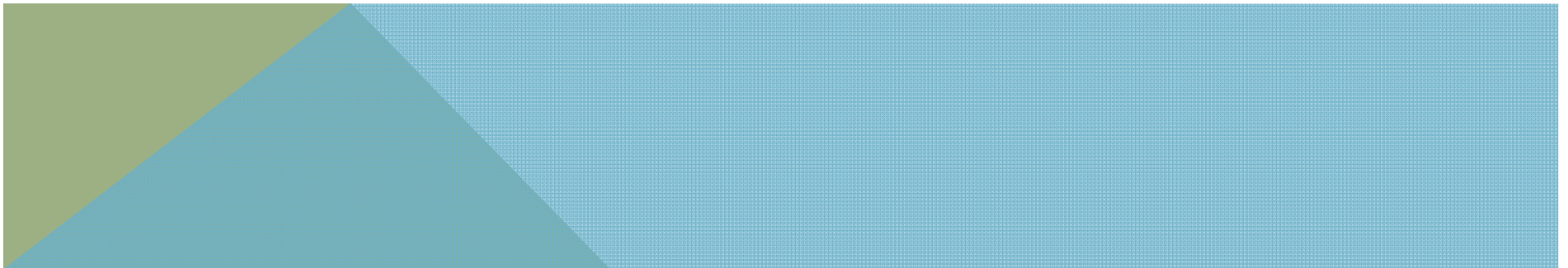


DUTIES & RESPONSIBILITIES

First things first...Set yourself up as the coordinator in your department

Once logged in to the USECF system, click the **“Administration”** tab

- Select **“Department Maintenance”** and follow prompts
- Set yourself up as the coordinator on Thursday, September 18, 2018
- A complete presentation is available on the website



DUTIES & RESPONSIBILITIES

As the coordinator you can...

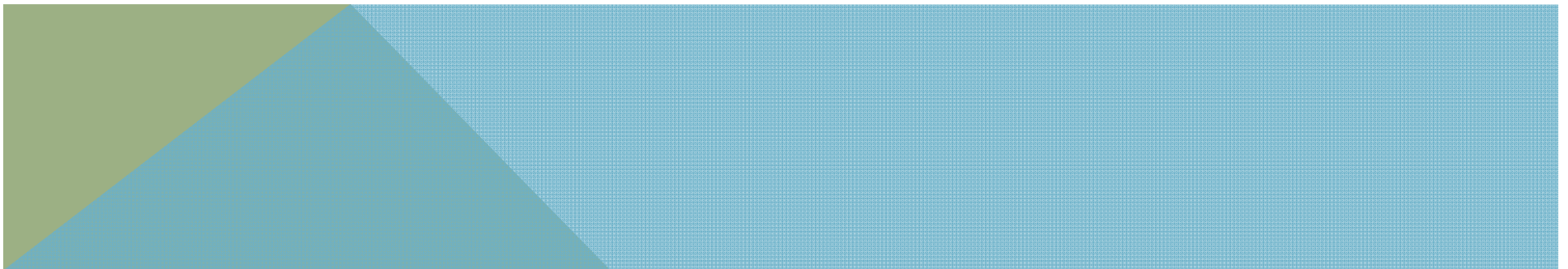
Reset, edit, delete employee accounts as needed

- Select “Manage Department’s Donators”
- Enter employee name, EIN
- Reset, edit, or delete the employee’s donation as needed

Manually enter pledges as needed

- Select “Manage Department’s Manual or Paper Donators”
- Enter the employee’s EIN and click “Continue”
- Enter the pledge directly into the employee’s record

COMPLETE INSTRUCTIONS AVAILABLE ON THE WEBSITE: USECF.utah.gov



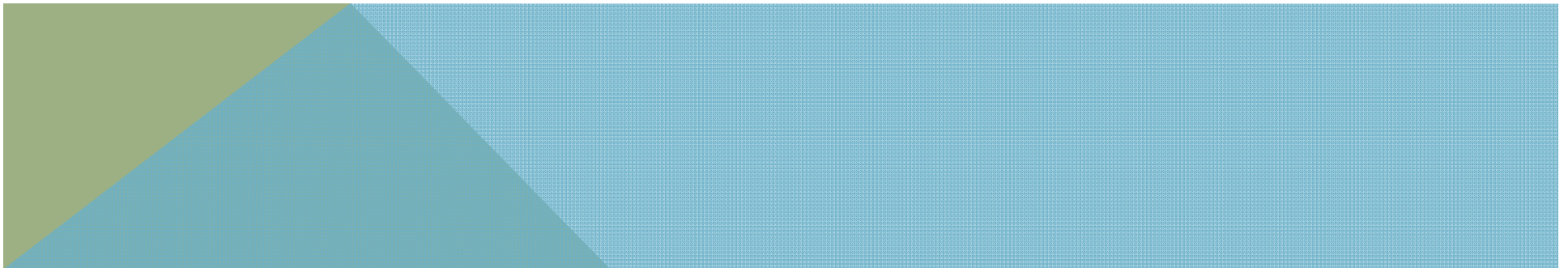
DUTIES & RESPONSIBILITIES

As the coordinator you can...

To donate online:

- Employees access the online dotation system through the website
- Employees use their state user name and password
- Last year's donations will appear and can be chosen for the upcoming year
- **NOTE: Donating is not automatic.** Employees must submit a donation each year.

COMPLETE INSTRUCTIONS AVAILABLE ON THE WEBSITE: USECF.utah.gov

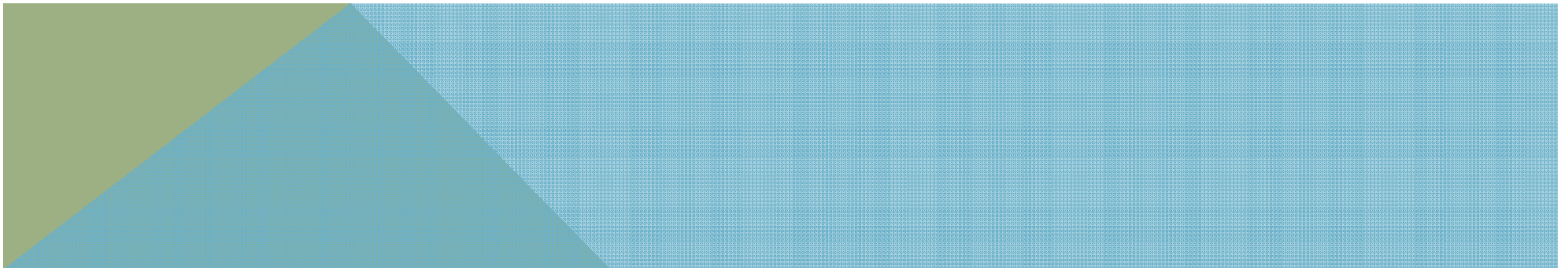


DUTIES & RESPONSIBILITIES

As the coordinator you will...

Submit forms and one-time payments to the Division of Finance

- Summary sheets for one-time donations can be found under the “Administration” tab on the USECF website
- All checks for one-time donations should be made payable to “USECF”
- According to Utah Code Annotated 51-4-1, cash receipts (and checks) must be safeguarded and deposited whenever practical, but not less than every 3 days
- Coordinators must deliver final packet of forms and one-time donations to the Division of Finance, where it will be counted and a receipt will be given



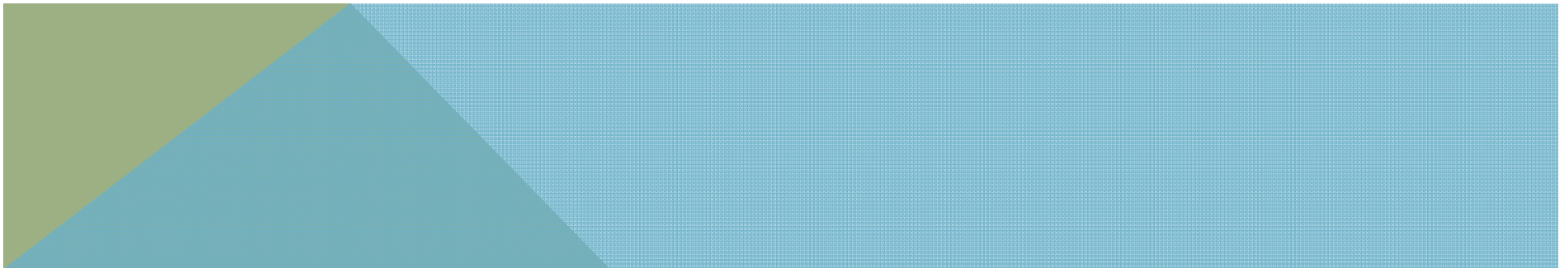
DUTIES & RESPONSIBILITIES

Wrapping things up...

At the conclusion of the campaign:

- Compare contributions pledged to monies received
- Complete the Pledge Summary Form
- Complete the Campaign Information Form

COMPLETE INSTRUCTIONS AVAILABLE ON THE WEBSITE: USECF.utah.gov




COMPLETING CAMPAIGN FORMS

Campaign forms can be found on the USECF website in the left menu bar under “Forms and Training”



Utah State Employees' Charitable Fund

Utah Employees Giving Generously to Our Communities and World

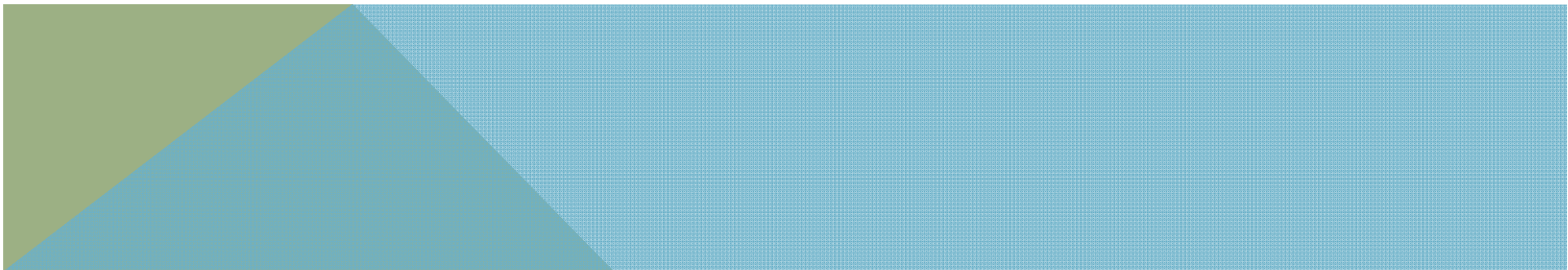


The Charitable Fund

- 2013 Campaign Totals: \$357,098
- Charity Application for First-Time Inclusion in Campaign
- Charity Renewal Form
- Charity Detail Report

Home
Background
Board Members
Bylaws
Charity Codes
Charity Connections
Current Campaign
Forms & Training
Governor's Statement
Pledge Online
Questions (FAQs)
1% Club

An Opportunity and a Responsibility



FREQUENTLY ASKED QUESTIONS

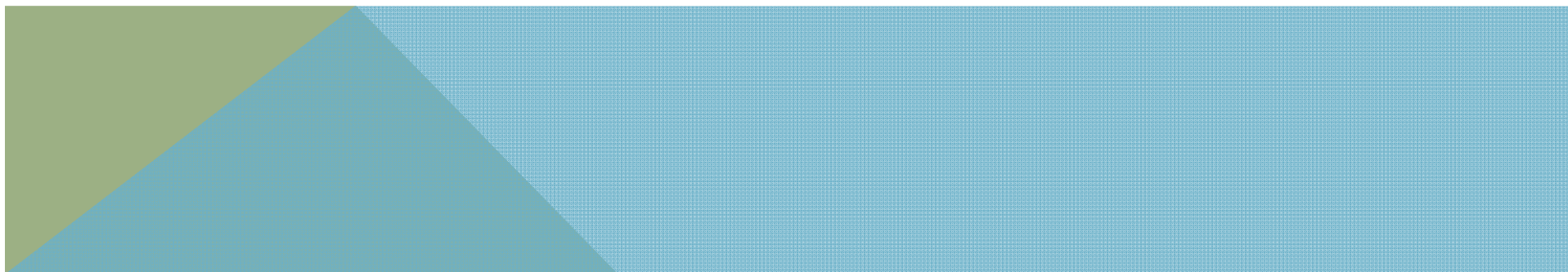
Taxes:

Contributions through payroll deduction

- Select an option and enter an amount
- After donating, receipt will show donation as tax deductible for the upcoming year

One time contributions are paid by check or cash to coordinator

- Employees fill out the donation form and turn in with cash or check
- A one time donation is as tax deductible for the current tax year



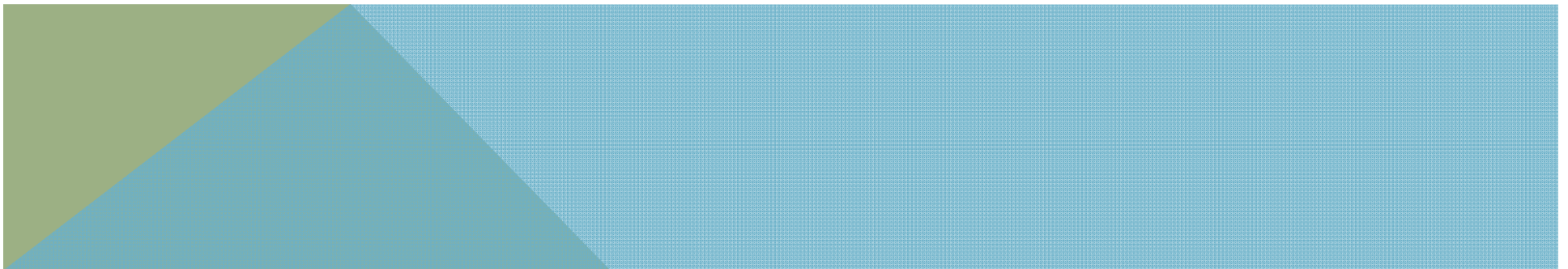
FREQUENTLY ASKED QUESTIONS

Charities:

Why isn't the charity I want to donate to listed on the master list of charities?

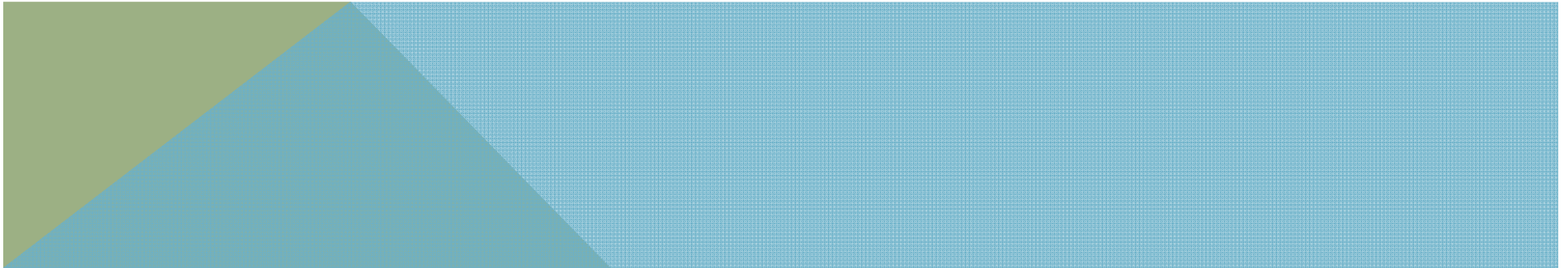
- If a charity is not on the list, that means they have not applied to participate in the USECF.
- Charities may apply to participate in subsequent campaigns.
- Write-in charities are not accepted

See a full list of FAQs on the website USECF.utah.gov





RUNNING A SUCCESSFUL CAMPAIGN



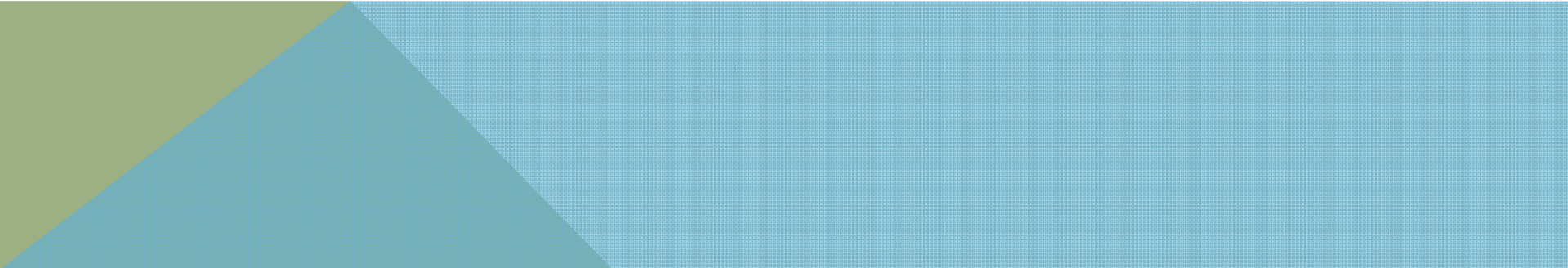
RUNNING A SUCCESSFUL CAMPAIGN

An online [flip book](#) gives some communication tips

Lend a Helping Hand
Communication Suggestions for Campaign Coordinators & Solicitors



 UTAH STATE EMPLOYEES' CHARITABLE FUND
Lend a helping hand



RUNNING A SUCCESSFUL CAMPAIGN

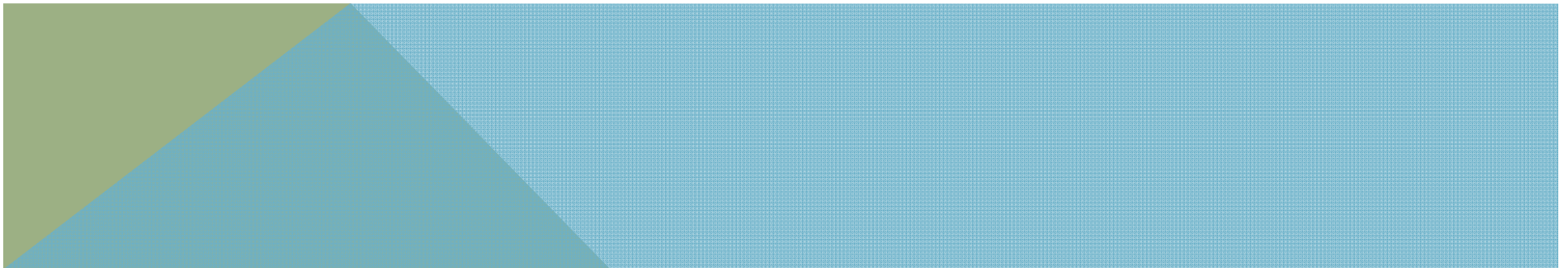
Share the message: Lend a Helping Hand

- An annual tradition of giving
- Charities help improve quality of life



UTAH STATE EMPLOYEES'
CHARITABLE FUND

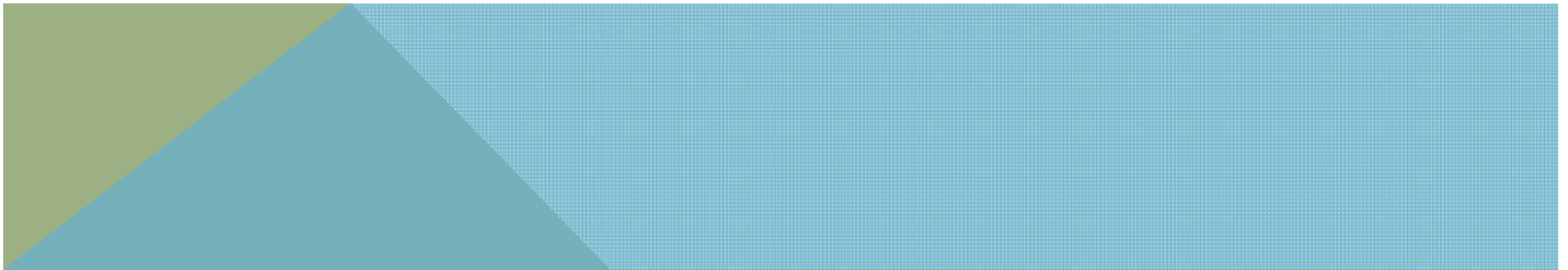
Lend a helping hand



RUNNING A SUCCESSFUL CAMPAIGN

Find out about the USECF Fund Campaign

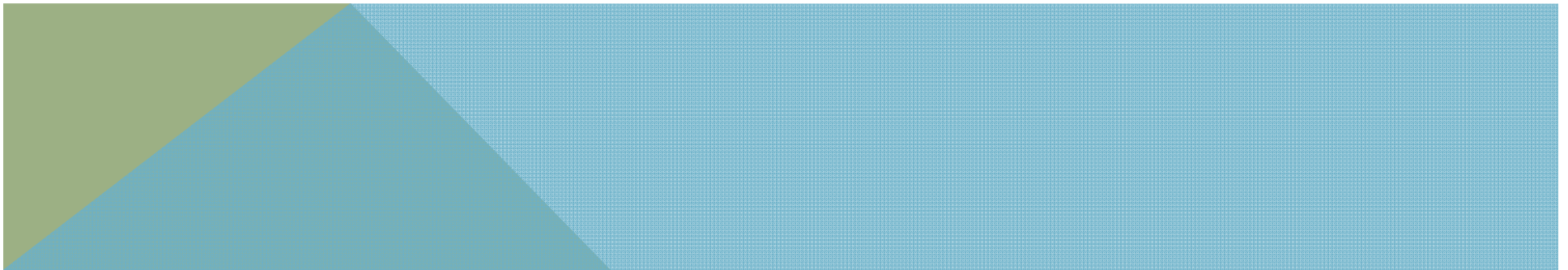
- Look at the website
- Resources: flyers, presentations
- Step by Step Guide
- FAQs



RUNNING A SUCCESSFUL CAMPAIGN

Get some help

- Big or small?
- Enlist others to:
 - Answer questions
 - Put up flyers
 - Collect one-time donations
 - Promote the campaign



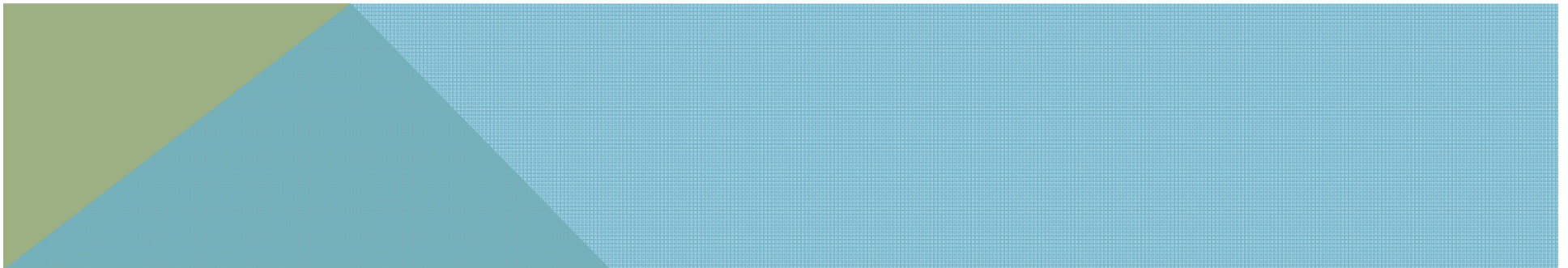
RUNNING A SUCCESSFUL CAMPAIGN

Set a goal make a plan

- Encourage more people to donate
- Emphasize donation rather than a specific amount

Make a plan

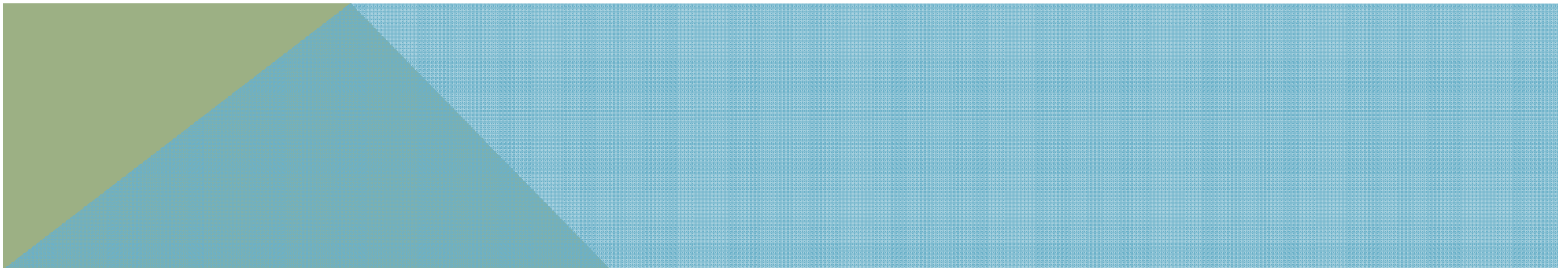
- Meet with helpers
- Write up the plan, including dates and actions
- Update helpers weekly



RUNNING A SUCCESSFUL CAMPAIGN

Plan can include:

- Send an introductory email from a manager
- Send an email the week before
- Place visual reminders at a stopping point
- Visit staff meetings
- Include reminders in newsletters
- Hold an event
- Make a video



RUNNING A SUCCESSFUL CAMPAIGN

Create useful, engaging flyers, posters, etc.

- Emphasize time range
- Always include url: usecf.utah.gov
- Your contact info for questions
- PDF list of charities and send
- Communicate value in donating
- Use the “Lend a Helping Hand” logo

Fall is the time
to lend a helping hand.



Donate online:
September 24 – November 3, 2018



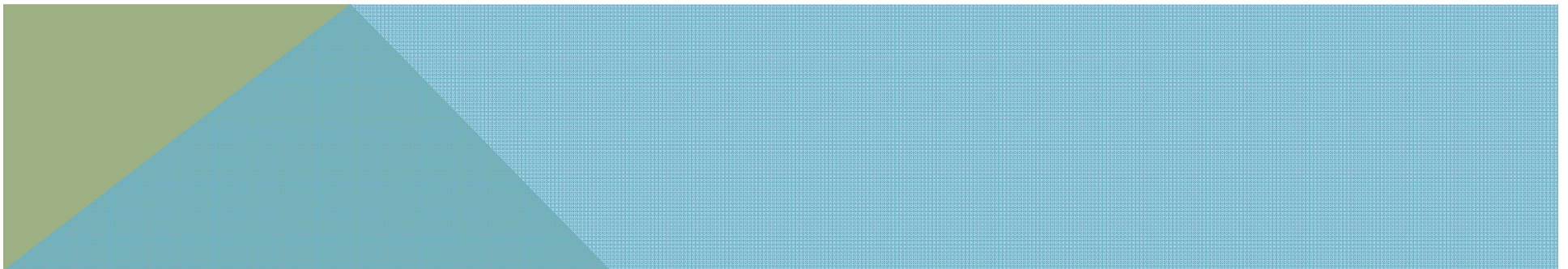
UTAH STATE EMPLOYEES'
CHARITABLE FUND
Lend a helping hand

usecf.utah.gov

RUNNING A SUCCESSFUL CAMPAIGN

Target each audience group

- Email
- Computer access?
- Visit new employees
- Go to staff meetings



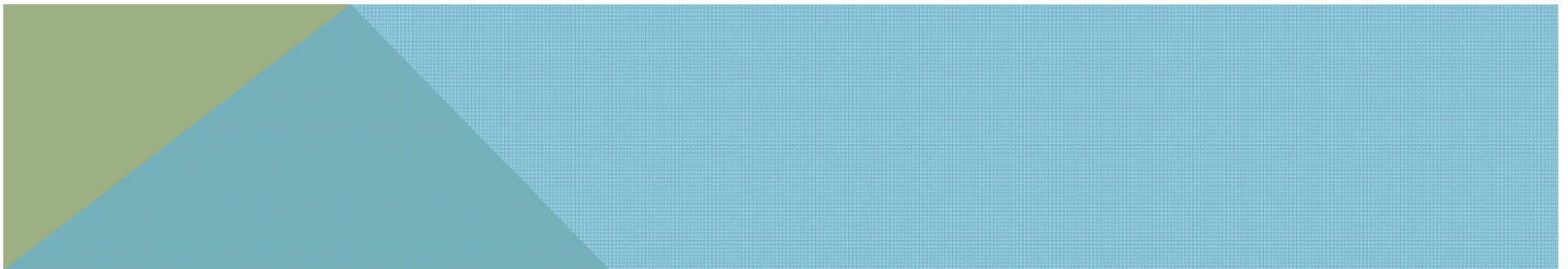
RUNNING A SUCCESSFUL CAMPAIGN

Choose a champion

- Senior leader video or message
- Use our video

Send updates

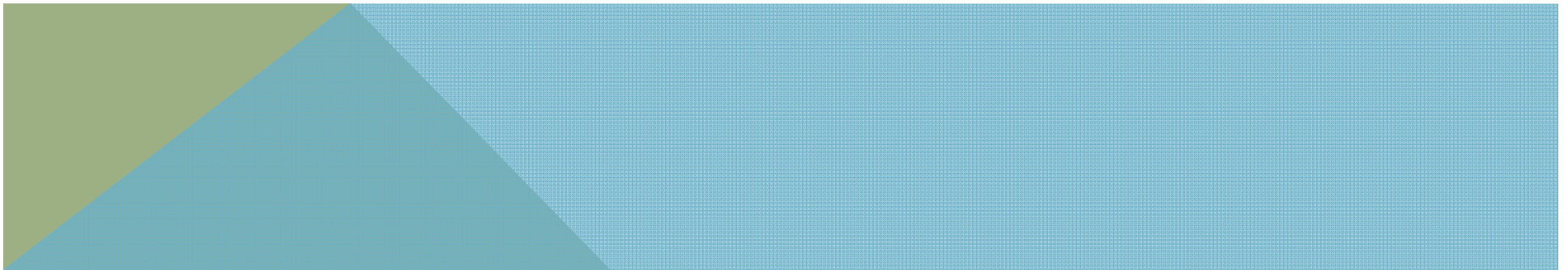
- Weekly ?
- Let employees know about the progress



RUNNING A SUCCESSFUL CAMPAIGN

Don't change what works!

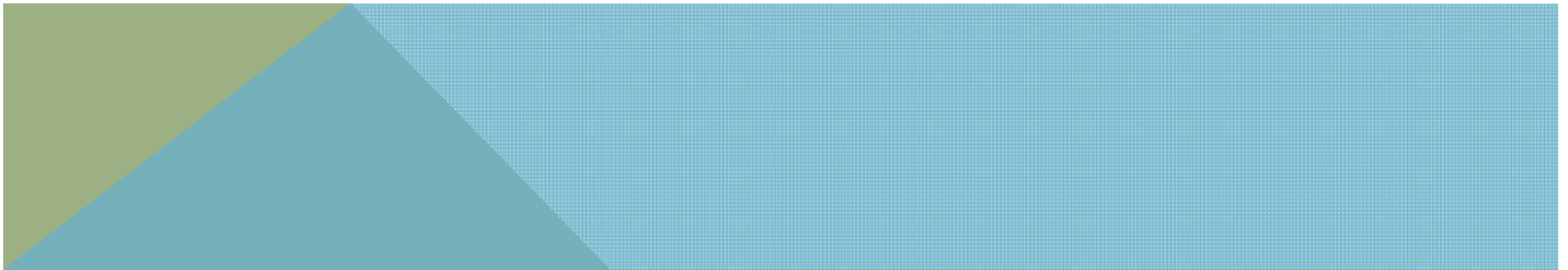
- What have you done?
- Any new plans?



RUNNING A SUCCESSFUL CAMPAIGN

Say thanks!

- Send a thank-you email letting employees know the final number of people donating or the percent increase
- List some of the charities that will receive funds
- Put up a thanks poster or flyers





Thank you

