UNIVERSITY OF CALIFORNIA, DAVIS

Employee Giving Volunteer Toolkit

UC DAVIS
STAGE 1

Preparation

2-4 weeks before campaign launch

Step 1: FORM A COMMITTEE

Identify approximately 5 faculty and staff members who are willing to plan, organize and execute the unit/departmental campaign. Within the committee, elect 1 or 2 people to serve as the chair/co-chairs. These individuals should be responsible for monitoring all stages of the campaign, ensure deadlines are met and coordinate with the rest of the committee.

Step 2: CHAIR OR CO-CHAIRS MEET WITH LEADERSHIP AND DECIDE ON OBJECTIVES AND CAMPAIGN GOALS

Getting approval and buy-in from your leadership and working with unit Development Staff will be very important. Not only will it grant your unit/department permission to launch this campaign, but also allow everyone to agree on a desirable goal or outcome. This will also give you the opportunity to seek budget approval from leadership for any expenses are incurred.

Possible goal examples could include:

- “We want to have XX% participation or higher by the end of Employee Giving month”
- “We would like to raise $XXXX as an area/unit/department by the end of Give Day”

Give Day/Giving Month Challenges

While Give Day and Employee Giving Month are new concepts here at UC Davis, there have already been successful giving challenges individuals or groups have pledged to incentivize reaching certain goals:

- In 2017, Vice Provost and Associate Chancellor, Joanna Regulska challenged Global Affairs to give during 2017 Give Day by matching their gifts dollar for dollar.
- Director of Athletics, Kevin Blue, agreed to dye his hair blue and gold if Athletics had 100% participation in 2017.
- School of Law has had 100% annual giving participation among their faculty for over 10 years.
Other challenges have included gift numbers, meaning that after a certain number of gifts made it would unlock that challenge gift.

- Example: “If we have 25 employees give on Give Day, it will unlock a $2,500 gift to support our students.”

**Step 3: FIND AMBASSADORS**

In addition to the committee, ambassadors are great advocates to share messages and promote the importance of the campaign. Often times, these are individuals who have previously been philanthropic to the institution and are happy to share their story about why they give. Ambassadors are great for helping promote the campaign by sharing the information, as well as providing a good example of the impact of giving.

**Step 4: DETERMINE MARKETING MATERIALS**

Whether you choose email or print materials, plan out what you will need for your campaign, how long it will take to create the materials, and who will be responsible for distributing. This could include everything from your campaign messaging, the updates and reminders, donor stories, as well as stewardship and donor thank you notes/emails.

**Step 5: DETERMINE AND PLAN FOR EVENTS**

Holding a few events in the early stages of the campaign is a great way to get the information out to your colleagues and build excitement! Request an agenda item for the campaign at any departmental meetings already scheduled, and briefly speak about the campaign. Don’t forget to plan a concluding event to celebrate the success of the campaign – even if you didn’t reach your goal!

Kickoff event example:

- Bring donuts and coffee into work the first morning of your campaign

**Step 6: CREATE A TIMELINE**

While the desired duration of a campaign is anywhere from 2.5 weeks to 1 month. The committee can decide what the proper timeline should be for their specific department, what events and communication plans they want to create to generate exposure and excitement. Possible ideas to plan around could be large meetings, creating a kickoff event, email updates and reminders, donor stories, conclusion events/celebration, and finally stewardship plans.

Assign at least one committee member to lead each task to ensure the committee will easily meet each deadline for the timeline.
STAGE 2

Campaign Execution

Follow the Timeline!

Keep leadership informed and involved about all planned communications and messaging, significant changes to the campaign timeline, as well as feedback you have received from employees that they should be aware of both the positive and the negative.

If possible, work with development staff to regularly track the results of your campaign.

Set regular committee meetings to communicate about the current status of projects relating to the campaign and deadlines.

Most importantly, don’t forget to HAVE FUN!

STAGE 3

Campaign Conclusion/ Stewardship/ Celebration

Once the campaign has concluded, make sure thanking your donors is both timely and personal. Examples of thanking individuals or smaller groups include:

- Personal thank you notes from committee members
- Thank you video for groups of people taken from a phone camera (example, thanking the entire communications team, not just one individual)
- Thank you from the beneficiary of the gift (example: if they support a student scholarship, have a student thank them; if they support a research project, see if a researcher would thank them)

Regardless of meeting the goals of the campaign, this is still something that should be celebrated as a whole. Plan something easy and fun that colleagues can celebrate together. For examples of large group stewardship see SAMPLE EMPLOYEE GIVING CAMPAIGN later in this toolkit.

Conclusion meeting:

At the end of the campaign, the committee should meet with various constituents like donors, ambassadors, and non-donors to gather their feedback. Meet as a group and discuss what worked and what could be improved for future campaigns. If you would like to share your experiences with the larger UC Davis employee community, that would be very helpful for others who are thinking of executing an employee giving campaign in their areas. Contact Kasey Webster if you are interested in sharing.
FAQS AND OTHER HELPFUL TALKING POINTS

What other resources do we have to help us with our campaign?

In addition to your area or unit development staff, if you have any questions please to contact Kasey Webster, Director of Development Philanthropy Programs.

• ktwebster@ucdavis.edu or (530) 754-0579

What if we don’t reach our goal?

That is ok! The fact you are conducting this campaign is an important step toward growing the culture of philanthropy at UC Davis. Remember, even if your first campaign doesn’t meet the established goal, it is still successful and greatly impactful!

Do I have to ask co-workers for money?

No, there are others ways to share. The best way to grow the culture of philanthropy among employees is by educating them on countless programs, areas of research, students, and projects impacted by giving every day. Help people find something they are passionate about and show them how their support, no matter the amount, can positively impact programs, people, and initiatives at UC Davis.

Committee member and ambassador asks should be done softly on both the large scale and personal level. Here is an example of a soft ask:

• “We invite you all to participate in our campaign by finding an area at UC Davis that you are passionate about.”

An example of what you might say when talking with colleagues face-to-face could be:

• “Our objective is to help colleagues identify areas they might be passionate about, and help them understand how they can support it. Here is some information, please let me know if you have any questions.”

This should be a fun experience for everyone involved! Remember employees might not want to give or might be in a situation where they just cannot at this time. If either of these is the case, be respectful and understanding of each person’s unique situation. Employees should not give because they are pressured; they should give because they want to support an area of UC Davis.

What do we do if we encounter resistances to campaign?

UC Davis is a unique place to work, and some employees may not see the connection between philanthropy and their workplace. If a co-worker mentions to you they do not want to participate in the campaign, respect their wishes and remove them from your campaign’s communication lists. Let them know they would still be invited to participate in any of the events if they wish. If they are willing to share their thoughts, listen and thank them for their feedback.
SAMPLE EMPLOYEE GIVING CAMPAIGNS

Kickoff

At an all team meeting, the department leader spoke about the importance of philanthropy and introduced the Co-Chairs to speak more about goals and objectives of the employee giving campaign.

Co-Chairs shared pledge cards at the meeting and explained the various ways employees can give. To conclude their employee giving presentation, they invited an Ambassador to share with the group why they give and where they give.

At the conclusion of the meeting, a pledge card with a bag of candy waiting for them at their desk, pictured below.
GOODIE BAG

The goodie bag included candy, with a message and customized branding for this specific employee giving campaign. Those who had already given had a customized note addressed to them thanking them for already making a gift during the fiscal year.

PLEDGE CARD

The pledge cards pictured below were created specifically for this campaign. The pledge card features each in the unit. The back of the pledge card provided more information about this campaign, including goals and directions on how employees can give. Contact information for further questions should be directed towards the chair or co-chair.
CAMPAIGN AMBASSADOR EMAIL

The final piece of communication on the first day of the campaign was from a campaign ambassador. The email was a summary of what was presented at the meeting, which included links and directions to help people navigate giving options. SEE MESSAGE BELOW

Dear colleagues,

We wanted to send a quick note to follow up on the exciting news shared at our University Development team meeting yesterday morning!

At the forefront of DEVAR, University Development leads the way for our colleagues each day. Now, you can help us lead the way in employee giving by making a gift of any amount to any UC Davis program or area that is meaningful to you. For those of you who have already made a gift - we thank you for your generosity!

There are many wonderful programs to support, and you can discover your philanthropic passion here. Your gift – no matter the size – truly makes a difference to our UC Davis community! With your help, we believe University Development can reach 100% participation by the end of January.

There are many ways to give, including:

- Through the UC Davis giving website,
- Pledging to give on Give Day (contact Kasey Webster or Michelle Poesy),
- Or by signing up for payroll deduction (if you have difficulty submitting the form, please contact Kasey Webster).

Over the next few weeks, we will share treats and great giving stories from our colleagues in University Development.

We thank you for your partnership – and look forward to what we can achieve together!

Your University Development Ambassadors,

Employee Giving Committee: Mary McCormack, Angela Nubla, Rebecca Heath, Joyce Ebuenga and Andrew Crotto
Early Reminder Event

To keep the momentum going during the campaign, the committee surprised the employees on a Monday morning with coffee, donuts, and bagels. An email was sent to invite them to the break room where committee members greeted them, shared the treats, and helped answer any questions that people had about the campaign. SEE INVITATION BELOW

Dear Colleagues,

Your University Development Employee Giving Ambassadors invite you to join us for coffee and donuts in the break room this morning from 8:15 – 9:00 a.m. You ‘donut’ want to miss this!

As of Friday afternoon, we’ve reached 55% for participation! We’re halfway through January and we’re more than halfway to reaching our goal of 100% participation! Thank you to those who have already made a generous gift supporting UC Davis! If you haven’t made a gift yet, or if you have questions about University Development’s Employee Giving Campaign, we will have a table set-up in the break room, where you can visit with one of our ambassadors, or ask questions.

Help us by making a gift of any amount, to any area that is meaningful to you. By investing as little as a cup of coffee a month, you can make a huge impact on campus!

There are many ways to give, including:

- Through the UC Davis giving website,
- Pledging to give on Give Day,
- Or by signing up for payroll deduction.

We ‘donut’ know how to thank you enough for your partnership, and look forward to what we can achieve together!

P.S.

Your University Development Ambassadors,

Employee Giving Committee: Mary McCormack, Angela Nubla, Rebecca Heath, Joyce Ebuenga and Andrew Crotto
REMINDER EMAILS, PROGRESS UPDATES, AND SHOWCASING AMBASSADORS:

During the duration of the campaign, the committee created a communication plan where they would schedule emails that would both remind employee about the active campaign and also update on the progress of the campaign. This was also a great way to spotlight employees that have a given and share their story. Sharing donor stories is a great way to make philanthropy relatable, it is also a unique way to steward that particular donor.

This first example went out in the monthly newsletter

Donor Story

DEVAR STAFF GIVING PROFILE:
Lori Ann Pardau

In observance of Employee Giving Month approaching in April, we will feature giving stories from our DEVAR colleagues. If you know of a DEVAR staff member that has a great giving story, please send their names to DEVARNews@ucdavis.edu.

Q: What inspired you to make your first gift to UC Davis?
My first gift was two to three months after I started working at UC Davis Health, and I wanted to make the university the beneficiary of my life insurance. My mother was being treated by a palliative care doctor at Kaiser Roseville who had been trained through the UC Davis Hospice Program, and I wanted to honor the great care she received. Supporting this program with my life insurance made sense.

Q: What do you love the most about UC Davis?
A: The first thing I think is, “What don’t I love about UC Davis”?! There are so many things I love about it. I love the diversity! We are doing everything here — whole life care, environmental care, human rights issues — you name it, it’s being done somewhere on the campus.

Q: Which area(s) and/or fund(s) do you donate to? Why?
I recently signed up for payroll deduct, and I support a few different causes across the campus and UC Davis Health: The LGBTQIA Center, We Are Aggie Pride, and The Pantry. I also donate handmade knit hats to the pediatric center. I’ve been making hats for children and teens for the past four years, and have made over 100 hats for patients!

Lori Ann Pardau, pictured with hat she knitted for patients being treated at UC Davis Department of Pediatrics.

Q: What do you hope Employee Giving Month will achieve?
I’m hoping that our colleagues know that we can make a serious difference without giving high amounts. If every person gave $5 in DEVAR each year, imagine what changes we could make! If everyone chose the one program that meant the most to them, and invested it — I think we could truly change the world.

Lori Ann is a senior Prospect Management and Training analyst in the office of Prospect Management and Research. She has worked at UC Davis for over 14 years.

For questions about employee giving, or to fill out a payroll deduct form, please contact Kasey Webster at kwebster@ucdavis.edu

OFFICE OF DEVELOPMENT & ALUMNI RELATIONS
Update Email:

The emails below were some of the scheduled update emails sent during the campaign by the committee members. The emails accomplish the following results:

- Reminds the employees that the campaign is going on
- Updates on the progress towards the goal
- Gave directions on how employees can make a gift
- Allows the committee member to share their story on giving back to UC Davis

Sample email 1:

Dear colleagues,

As one of your Ambassadors, I wanted to let you know how University Development’s employee giving campaign is progressing. We have reached 68% participation overall and four groups in University Development are already at 100% giving! I want to thank each of you for your gifts so far!

We only have 9 days left to go to reach our goal of 100% staff giving!

When I began in my role in November, I was excited to discover my philanthropic passion at UC Davis. Animals are very important to me; I have 3 adopted dogs and I also volunteer at local animal shelters. My passion for animals led me to give to the UC Davis Fracture Program for Rescue Animals, which provides surgery for animal strays and victims of animal cruelty at our School of Veterinary Medicine. Easily corrected medical injuries, like fractures, can become a common barrier to adoption for shelter animals. Providing needed surgery for these rescued animals helps educate our veterinary students and enable these animals to go on to find forever homes with loving families.

When I signed up to give through monthly payroll deduction, it couldn’t have been easier. I can’t wait to see the impact my contributions make for this program!

If you would like to make your gift count towards Give Day as well as count your participation in our mini-campaign that concludes on January 31, follow these easy steps:

1. Fill out the “Leading Every Day in Every Way” pledge card by selecting the “Pledge on Give Day” option
2. Select the area(s) you would like to support
3. Select the amount you would like to contribute
4. Return to Kasey Webster or any of the Ambassadors by January 31st and we will document the pledge in AIS
5. Give your gift on Give Day April 20-21st!

Please don’t forget, no matter the size – each gift makes a big difference!

Thank you,
Sample Email 2:

Hello coworkers,

I wanted to let you know that University Development is currently at 80% participation overall and 6 of our departments have reached 100% giving! Thank you so much for contributing to this important campaign.

We only have 2 days left to achieve 100% giving participation before January 31st!

I have been giving to UC Davis since I began my time here about 6 years ago. My first gifts were to We Are Aggie Pride, the student-run philanthropy group that gives money to students in emergency financial need. I was lucky enough to have worked with this group in their inaugural year as a staff advisor. The hard work of the student board and the truly life-changing impact of their work inspired me to make a monthly gift via payroll deduct to help support their efforts.

UC Davis is truly exceptional in its efforts to advocate for students from underserved communities. Through my work with annual giving I have seen so many of these amazing students that we profile in our campaigns. I was introduced to the AB540 and Undocumented Student Center that supports our Dreamer students with legal and financial assistance. With the current political trends, I felt compelled to help these students reach their educational goals, so I added the Center to my monthly payroll deduction gift.

I hope there is something at UC Davis that inspires you as much as our students inspire me, and I encourage you to support it with a gift of any size.

If you would like to make your gift count towards Give Day as well as count your participation in our mini-campaign that concludes on January 31, follow these easy steps:

1. Fill out the “Leading Every Day in Every Way” pledge card by selecting the “Pledge on Give Day” option
2. Select the area(s) you would like to support
3. Select the amount you would like to contribute
4. Return to Kasey Webster or any of the Ambassadors by January 31st and we will document the pledge in AIS
5. Give your gift on Give Day April 20-21st!

Thank you,

Andrew Crotto

Development Analyst
Employee giving Committee Member

Employee Giving Committee: Mary McCormack, Angela Nubla, Rebecca Heath, Joyce Ebuenga and Andrew Crotto
Conclusion Event/ Final Push

To remind everyone the campaign was concluding and gently remind colleagues it was last chance to participate for it to count with regards to the campaign’s goal, the committee held one more event where they brought in coffee and donuts. This was similar to the kickoff event noted above but was on a smaller scale.

Campaign Conclusion/ Group Stewardship and Celebration

Individual/ Group Stewardship:

The goal for this campaign example was 100% participation, they decided to steward those teams who reached 100% separately. They did this by filming videos on their phones thanking those departments when they reached 100%. These videos were sent to the teams as soon as they reached the goal.

Finally, there was a video sent to the entire department announcing the results.

Sample Videos

Thank You - https://ucdavis.box.com/s/8bgf89k2s3o31wyx43jxgg2i36x8y1km

Thank You - https://ucdavis.box.com/s/6zkqx92s8z89x4c49z58s5sm4988m9cl

Gunrock/Employee Giving - https://ucdavis.box.com/s/7mls42uaxr2uzslqzmokipbor12pzi

Overall Celebration:

For reaching the campaign goal, the committee and leadership organized a celebration event.

The final event, which fell on Valentine’s Day, was a celebration about a week after the campaign concluded. The committee organized a frozen yogurt event for the afternoon. In addition to the email that was sent out the prior week with an Outlook calendar event, they also left a thank you note with some candy on all the employees’ desks, thanking them and reminding them about the event later that day.
SAMPLE BUDGET

The budget for this campaign event is provided below. These numbers reflect planning for a department the size of around 75 people.

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<td>100 Goodie Bags/Blue &amp; Gold Ribbon (Amazon)</td>
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