# State, University, and UW Health Employees Combined Campaign of Dane County

# giving.wi.gov

# Partners in Giving Campaign

Partners in Giving™

**CHAIR** ______________________________

**COORDINATOR** ______________________

# Table of Contents

# What is Partners in Giving?

Partners in Giving is a once-a-year, volunteer-driven workplace campaign through which State of Wisconsin, University of Wisconsin, and UW Health employees in Dane County can conveniently give to many of their favorite charitable organizations. It combines the efforts of 11 umbrella groups, representing hundreds of charities, into one seven-week campaign, running this year from mid-October through the end of November.

*Partners in Giving is ...*

## Selective

Each participating umbrella group must submit audited financial statements of its activities to obtain approval from the campaign Eligibility Committee (comprised of employee volunteers) and the Wisconsin Department of Administration to take part in the campaign. Every participating charity must also meet rigorous eligibility requirements set by the state.

## Full of Choices

You can choose from more than 500 charitable organizations (including the umbrella groups) performing a wide range of services. There are so many AMAZING choices! Look for a brief description of each umbrella group and charity in your Partners in Giving booklet or look at the Partners in Giving website - http://giving.wi.gov/charities/index.asp, if available. You can choose one or several charities to support, and the amount of your donation is up to you. You can give by cash, check, payroll contribution, or by credit card. Your gift, your choice! You can also make your donation online at giving.wi.gov.

## Efficient

This combined effort saves time and money for the participating charitable organizations. Because the campaign is run by hundreds of volunteers (YOU!), overhead costs are much lower than those of similar campaigns across the country. This means more dollars go to the charities and umbrella groups to support their vital work.

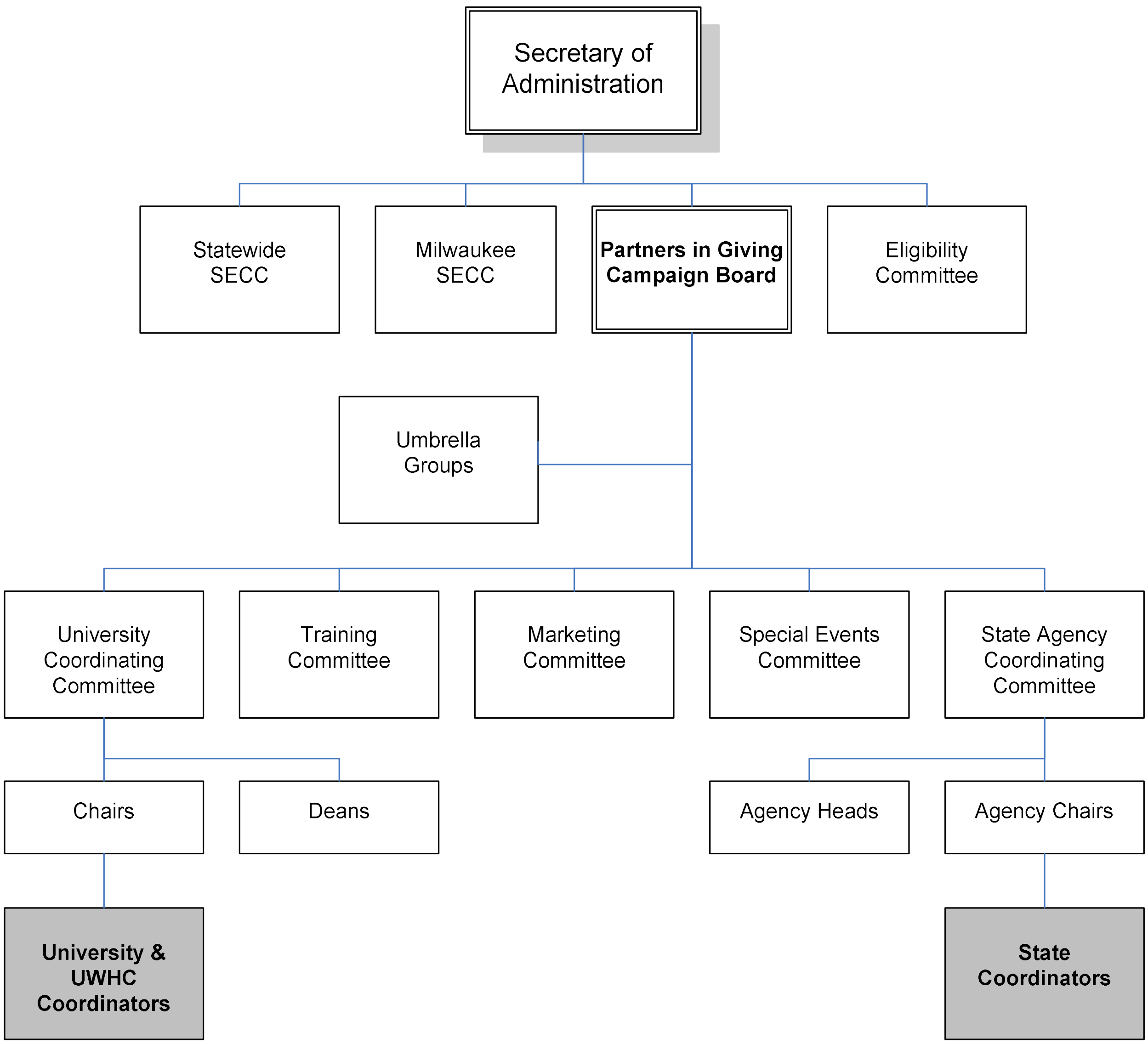
## Successful

Since its inception as the State Employees Combined Campaign in 1973, the campaign has raised in excess of $69 million for charitable causes.

# Who Comprises the Partners in Giving Campaign?

*Where you fit in….*

**Partners in Giving* Campaign Structure**




***State Employees Combined Campaign (SECC)** is the official legal name of the workplace giving campaign that includes state employees, University of Wisconsin employees, and UW Health employees. The campaign is divided by geographic area, there is an SECC – Statewide campaign, an SECC – Milwaukee Partners in Giving campaign, and an SECC – Dane County campaign. The SECC Dane County campaign is known as the “Partners in Giving” campaign.

**For a full list of all Partners in Giving Board members and Committee members please visit giving.wi.gov.**

# Job Descriptions

**Eligibility Committee** – Ensures that all participating charities comply with eligibility guidelines outlined in Chapter 30 of the Wisconsin Administrative code.

**Umbrella/Federation Group** – An organization that represents groups of nonprofit charities (an umbrella group is also sometimes called a federation or association). For a complete list of participating umbrella groups and their member charities, see the campaign booklet or website.

**State & University Coordinating Committees** - Work with agency/school campaign Chairs to provide resources and answer questions to ensure a successful campaign.

**Marketing Committee** - Design and produce promotional materials for the campaign, including campaign booklet, posters and website.

**Special Events Committee** - Plan and coordinate campaign kickoffs, pre-campaign Chairs luncheon and post-campaign volunteer awards celebration.

**Training Committee** - Design and produce training materials, as well as deliver orientation and training to campaign Chairs, Coordinators, and speakers.

**State & University Chairs**

1. Recruit Coordinators and ensure Coordinators receive both the formal training from the Partners in Giving Training Committee and internal training from you. Attend training with your Coordinators.
2. Establish campaign strategies, including timetable, goals, etc.
3. Promote the campaign by coordinating in-house publicity.
4. Distribute campaign materials and establish reporting mechanism.
5. Monitor progress of Coordinators.
6. Review progress of campaign (including online giving) and communicate to Coordinators.
7. Order and distribute “Thank You” certificates to Coordinators.
8. Wrap up by campaign end date.

**State & University Coordinators**

1. Attend training.
2. Contact each employee, provide information about the campaign and ask him or her to give.
3. Distribute pledge forms and campaign booklets to employees.
4. Follow up on contacts.
5. Collect contributions and offer employees “contributor” recognition item.
6. Keep up to date with online gifts.
7. Give the PINK copy of the pledge form to the donor for their tax records.
8. Complete a weekly report envelope and enclose contributions and pledge forms.
9. Make a copy of the report envelope for your records.
10. Deposit contributions at the CREDIT UNION with copies of pledge forms.
11. Wrap up by the campaign end date.
12. THANK employees for their participation in the campaign.

# Campaign Timeline

| | |
|---|---|
| February | Charities submit applications for participation in the Partners in Giving Campaign. |
| March | Campaign Eligibility Committee reviews and recommends applicants for participation. Partners in Giving Volunteer Recognition and Leadership Awards Ceremony usually is held. |
| April | Partners in Giving Administrative Board sets campaign dates and campaign goal. Administrative Board appoints new committee members. Committees work year-round to ensure that the campaign is a success. Standing committees include Marketing, Training, Special Events, and Coordinating Committees for the State and University. |
| May | Campaign Chairs are appointed and may begin recruiting Coordinators. |
| August | Training Committee conducts Campaign Chair Orientation. |
| September & October | Training Committee conducts Campaign Chair and Coordinator Trainings. |
| Early October | Materials delivered to Chairs or designated Material Recipient. Special Events Committee coordinates events to kick off the Campaign. Chairs/Coordinators announce Special Events to their work units. |
| Mid-October | Campaign Begins. |
| November | Campaign Ends. However, pledges for this campaign year are accepted until May 15th of the following year. |

# Tasks for Chairs and Coordinators

Teamwork and communication between the Chairs and Coordinators are essential to a successful campaign. Campaign Chairs will be appointed by the Dean or Secretary of each unit or agency no later than August, prior to the campaign. The Chairs communicate the overall campaign goals to their unit or agency and manage their campaign. The Chair also has many responsibilities during the campaign. These responsibilities include recruiting and leading Coordinators, assisting with special events, and the distribution and collection of pledge forms.

Below is a break-down of tasks that typically occur throughout the campaign to use when planning for the campaign and for distributing tasks amongst the campaign team in your unit or agency.

**August:**

- Chair attends the Partners in Giving Chairs' Orientation and Leadership Engagement Luncheon on August 23rd.
- Chair meets with the Dean or Agency Secretary to secure and confirm their commitment to the campaign.
  - Consider asking them to write a letter of endorsement to include with the pledge form, send an email at the beginning of the campaign, and/or speak at the campaign kick-off or a special event.
- Chair begins to recruit Coordinators!
  - Recruit one coordinator for every 20 – 25 employees. Coordinators are those volunteers who will distribute information and asks colleagues to participate in the campaign. An organized, motivated, enthusiastic individual is a good choice for coordinator.
  - Chairs often seek help to recruiting Coordinators through agency or unit leaders. Send a letter or e-mail asking them to recruit Coordinators for each unit if needed.

**September:**

- Make sure to attend a training session.
- Chair begins planning campaign.
  - Review and analyze prior year's giving history (available at August Chairs' Orientation)
  - Know the Partners in Giving story.

    - Utilize resources such as the training committee members, training materials, and the new and improved Partners in Giving website: giving.wi.gov.
- Establish participation and dollar goals.
- A member of the UW or State Coordinating Committee will contact the Chair to explain the role of the coordinating committee and how they will be in touch with the Chair during the campaign to support their work.
    - The campaign's Loaned Executives will also begin scheduling a meeting with the Chair (and Coordinators as specified by the Chair) to help with campaign planning and goal-setting.
- Hold an organizational meeting with the Chair and all Coordinators on the committee.
    - Partners in Giving Campaign Overview
    - Schedule Chair and Coordinators to attend training
    - Establish routine meeting schedule.
    - Discuss dollar and participation goals and review prior year's giving history.
    - Establish campaign timelines
    - Determine campaign material distribution method(s) best suited for your agency or unit (one on one, group or department meetings)
    - Discuss plans to publicize your unit or agency's campaign (see publicity tips on page 14)
    - Review materials and establish weekly pledge submission procedures (booklet, pledge form, report envelope)
    - Plan a Kick-off Event for your Organization
    - Discuss any Special Events and begin planning

**During the Campaign (October-November):**

- Hold a Kick-Off Event with umbrella group representatives.
    - Announce your goals, campaign timelines, incentives, and special events.
    - Have a tabling event with each umbrella represented so your coworkers can meet representatives from several of the charities listed in the campaign to learn more about how their gift will make a difference. Contact Kristi Heming (special events co-chair, 608-262-6815) to schedule a tabling event or ask your Loaned Executive for more information.
    - Have a speaker present at your Kick-Off event from one of the charities represented in the campaign.
- Pledge first! IT is easier to ask others to consider giving when you can communicate your personal enthusiasm for the campaign.

- Personally distribute pledge forms and booklets to each of your colleagues. Use this opportunity to:
    - Educate employees about the campaign
    - Answer questions about the campaign
    - Share with your colleagues how to give online or by paper
    - Give a deadline for the return of pledge forms and to complete online pledging
- Each week, fill out the Weekly Report Envelope and insert pledge forms, cash, and checks into the report envelope before depositing the envelope at the Credit Union (Summit Credit Union for State Employees and UW Credit Union for UW and UW Health employees).
    - Ensure that pledge forms are properly completed and signed for payroll deduction.
    - Separate and distribute completed pledge form:
        - White copy – Credit Union
        - Yellow copy – Payroll
        - Pink copy – Donor
    - Coordinators should send a copy of all report envelopes and send to chair (unless otherwise directed by Chair).
    - Keep a running total of amounts pledged, number of donors, etc. Track results by division or unit (if applicable).
    - Reports are available online to review pledge details for those employees electing to pledge online. Use the pledge reports to update the running total and to notify Coordinators about employees who have donated online.
- Follow up on Pledge Forms.
    - Remind individuals of the deadline and ask if they plan to give.
    - Include retirees from your agency or unit (if applicable).
    - Give New Employees, limited-term employees, and contract employees the opportunity to participate.
- SAY THANK YOU!
    - Collect contributions and offer each contributor a Partners in Giving magnet.
    - Thank each contributor and let donors know the incredible impact they are making.
    - Be sure to thank and give magnets to online donors.
    - Hold a special thank you event to celebrate your donors.
    - Thank Coordinators for volunteering and ensure they are invited to the post campaign volunteer awards celebration.

- Hold special events throughout the campaign. For special event ideas, check out the special events guide in the resource section of giving.wi.gov.
- Continue communication between Chair and Coordinators throughout the campaign. Share progress of the campaign (campaign electronic newsletter, campaign results), solve problems, and provide encouragement.

**Post Campaign:**

- Feature results and highlights of the campaign in your agency newsletter.
- Tabulate and post your final results.
- Campaign typically ends in late November or early December, but pledges are continually accepted.
  - All pledges received by January 31 will be included in the award calculations for the prior year's campaign. Accept the pledge form, forward copy to payroll if appropriate, then complete a report envelope and drop it off at the appropriate credit union. For pledges received after January 31, encourage the donor to write a check or adjust the number of pay periods for payroll deduction.

# Common Concerns and How to Address Them

1. **I'm paying more out of every paycheck now for health insurance and toward my retirement. Why should I give?**
   All employees in this campaign find themselves in this same difficult situation; however, there are many good reasons to give:
   - The need has never been greater. Because of the ongoing challenges with the economy, the funds raised through this campaign are vitally important. Your contribution, large or small, makes a critical difference.
   - Many in our community are unemployed or barely making ends meet. Those of us with steady jobs have an opportunity to help.

2. **Why should I make my employer look good by contributing to this campaign?**
   Partners in Giving always has been an independent, employee-driven campaign. Although endorsed by your employer, it is run entirely by employee volunteers who want to help ensure that charities and the valuable services they provide are available to all who need their assistance. Remember that charities, not your employer, benefit when you contribute.

3. **I'm planning to retire soon. Can I continue to give to the campaign?**
   Yes. Access the campaign website at giving.wi.gov for information and news. Everyone, including retirees, can pledge online via the website by clicking on the "Give Online" link. Retirees also can receive an annual reminder from the campaign by mail. To have your name and address added to the mailing list, contact the campaign's fiscal agent (United Way of Dane County); specifically Carli Wilke, (608) 246-5482.

4. **I'm too busy with work to think about giving to the campaign.**
   Contributing to Partners in Giving is quick and easy. Just spend a few minutes reviewing the list of eligible charities, then fill out your pledge form or go online to pledge. That's all there is to it.

5. **I'd like to give, but I want to remain anonymous. How do I do that?**
   It is easy to remain anonymous. Simply check the box requesting that the campaign keep your name and address private: "Please do not release my name to any designated charities or associated umbrella groups. I prefer to remain anonymous."

6. **I can't afford to give.**
   It's not the size of your gift that matters, what matters is that you give what you can and participate in the campaign. Small gifts from many people add up and make a real difference. Payroll contribution enables you to spread your gift over a period of time. If you are paid every two weeks, for example, donating just $1 per pay period contributes $26 per year to a charity of your choice. (See page 17 for examples of the great work charities can do with $26.)

7. **I feel I am being pressured to give to the campaign.**
No one should be forced or intimidated into giving. The Partners in Giving campaign is made possible through the efforts of volunteers. When a coordinator pressures a coworker, he or she is defeating the very idea of voluntary giving. Each potential giver should understand the facts, the needs of the charities, the importance of each contribution, and then decide privately and freely how much, to whom, and whether to give.

8. **My spouse/partner gives at work.**
Partners in Giving asks contributors to give in proportion to their own income. One alternative is to divide the family contribution, so that some is given in both workplaces.

9. **I work for a living and pay my own way. I'm never going to use these services. Why should I pay for them?**
Anyone who never needs these services is fortunate. No one is immune to the potential threats of illness, accidents, or natural disasters. When these things happen, almost everyone asks, "Where can I turn?" The answer will be the charities supported by the campaign, but only if we all help to make sure they are there when people need them.

10. **There are just too many worthy causes. I can't give to all of them.**
Nobody expects you to give to all of them. This campaign makes it easy to contribute to hundreds of worthy causes, but each contributor decides personally how many and which to support. You may pick only one or two, if you wish. The choice is entirely yours.

11. **If I give to Partners in Giving my pledge will go to Charity X, and I don't like Charity X, so I'm not giving.**
By designating your Partners in Giving contribution to specific charities and/or umbrella groups, you ensure that your gift goes only to those charities or umbrella groups. This way, none of your gift will go to any organization that you do not wish to support.

12. **I like to give in person or to help by volunteering for a group.**
Personal service is a wonderful way for workers of limited financial means to help without spending much money, and Partners in Giving provide many opportunities to volunteer. (See the campaign website for details.) Employees are encouraged to make a financial contribution in addition to volunteering.

13. **It's too difficult to find the charity I want to give to in the booklet.**
An alphabetical listing of all participating charities is located in the back of the booklet and online at giving.wi.gov.

**15. Is my contribution tax-deductible? I want to make contributions that are tax-deductible.**

Yes, as allowed by law. Only umbrella groups and charities that qualify for federal tax-exempt status may participate in the campaign. Please note: The Pension Protection Act of 2006 requires taxpayers who claim deductions for charitable donations to provide proof of all contributions should they be audited. Be sure to keep a copy of your pledge form for tax purposes. In addition, if you choose payroll contribution, keep copies of all pay stubs and/or other documents from your employer that indicate the amounts you have given to charities.

If you contribute by cash, check, or credit card, keep all receipts, canceled checks, and/or bank statements that verify the amounts and recipients of your contributions. Donors who give by cash, check, or credit card will receive a receipt for tax purposes for a single payment of $250 or more. Receipts for gifts of less than $250 are available upon request. If you have any questions about tax deductions for charitable gifts, consult a tax professional.

# Tips for Publicizing the Partners in Giving Campaign

The campaign Marketing Committee produces an e-newsletter that can be used in agency or department newsletters. Please encourage the newsletter editor where you work to use them. The e-news is sent to campaign Chairs. If you would like to receive the e-news directly, e-mail Connie Chesnik connie.chesnik@wisconsin.gov. The website is a good source of other information about the campaign as well. Check it periodically for updates.

*But the best way to get the word out is through YOU.*

**One-on-One Communication**

If possible, deliver the campaign booklet and pledge form to employees in person, particularly to new employees who may not have heard of the Partners in Giving campaign yet. Explain briefly what it is and let them know you're available if they have any questions. Provide each employee with a letter from the campaign Chair.

**Use E-mail**

1. Send all employees a brief message to let them know the campaign is beginning and to encourage participation.

2. Publicize the kick-off celebrations and other special events. Be sure to include their times and locations.

3. Update your employees every couple of weeks, or as you feel appropriate, on the progress of the campaign within your agency or department.

4. Send reminders to let people know when the campaign will end.

5. When the campaign is over, send a thank you message to ALL employees. Example - "Thanks to all of you who helped make the Partners in Giving campaign a big success. Your generosity is very much appreciated."

**Highlight What's New**

1. See page 3 of the campaign booklet to read about the thousands of dollars that your coworkers at state agencies, the UW, and UW Health have contributed and the multitude of charitable organizations and causes they have supported.

2. There is often new information on the Partners in Giving website (giving.wi.gov), which is updated regularly throughout the campaign.

3. Tell employees about any new campaign activities or projects within your agency or department.

**Get fellow employees to tell their stories**

Find employees from within your bureau, department, school, or college who have benefited from the work of charities in the campaign, or who volunteer for those charities. Ask if they would be willing to share their story, perhaps in the agency/unit newsletter, via e-mail, or at a kick-off event or staff meeting.

**Use the current Partners in Giving Speaker's List to schedule an umbrella/charity representative to speak**

You can request any umbrella/charity speaker by contacting the corresponding umbrella representative on the Speaker's list. These speakers have been trained to talk about the campaign in general and provide examples of how the funds raised have benefited their charity and the community.

**Encourage the use of the Partners in Giving website (giving.wi.gov)**

1. Find information and news about the campaign.

2. Find contact names and phone numbers along with links to umbrella groups and charities.

3. Send comments or questions about the campaign to the Administrative Board via the website.

4. Remember, employees can contribute online at the Partners in Giving website! (giving.wi.gov)

**Use the "dollar buy" statements** – See the lists on the pages 17 - 18 of what a dollar a pay period (or a few dollars a month) can help participating charities accomplish. The lists are updated annually with new information from the charities. The lists can also be found on the website (giving.wi.gov). The statements of what a dollar a pay period can do are especially useful to encourage first-time donors.

**Sample Letters**

Sample letters for a variety of campaign-related purposes are available on the website at giving.wi.gov.

- Endorsement Letter
- Letter to Coordinators
- Follow-up Letter to Coordinators
- 1st Follow-up Letter to Prospective Donors
- 2nd Follow-up Letter to Prospective Donors
- Request Letter Asking Companies to Donate Gifts for Drawings
- Memo at the End of Campaign
- Thank You Letter to Contributor

**Make sure the Partners in Giving posters are in a highly visible location** during the entire campaign. Put them up wherever people are likely to pass by.

**Plan a special event** – Please contact Kristi Heming, Special Events co-Chair, by phone (262-6815) or by e-mail heming@chem.wisc.edu for exciting ideas. If you are planning a special event that requires attendance by representatives from more than one umbrella group, please contact Kristi before scheduling, to avoid overbooking of representatives.

## What a Dollar a Pay Period Can Buy

# Partners in Giving

Together we can make a difference! By joining together to support charities in our community and beyond, we conquer hunger, disease, pain, poverty, injustice, pollution, and more. State, University and UW Health employees in Dane County who contribute to Partners in Giving have given a remarkable $72 million to charities over four decades.

Remember that a gift of any size can make a difference – even **$1 a pay period.**

**Just look what participating charities can do! $26 a year….**

- Buys a renovated walker for a disabled client.
- Buys attendance at a proactive health journaling workshop for one woman.
- Pays for one hour of training to prevent the abuse, neglect, or mistreatment of a child with a disability.
- Purchases seed to plant a partial acre at a future prairie restoration.
- Supplies specialized infant formula for an at-risk baby.
- Buys over 100 books for young children who would otherwise have limited learning opportunities in their home while preparing for success in Kindergarten.
- Provides an at-risk middle school student with a day of Academy A.L.D.O. after school programs to learn how to preserve and protect our natural world.
- Screens 12 men or women for skin cancer.
- Provides an adolescent girl with a week-long training to help her improve assertiveness, leadership and other life skills for a brighter future.
- Provides a new service dog handler with an appropriate leash for their service dog.
- Provides basic hygiene kits (washcloth, soap, shampoo, toothpaste, etc.) for 7 children.

# Partners in Giving:
# What Several Dollars a Month Can Buy

**Your gift of:**

**$5 a month**

- Supplies pontoon rental for 15 clients to experience Madison lakes (Access to Community Services)
- Supports an educational class visit and tour of the historic Aldo Leopold Shack and Leopold Center, where students learn the value of ecological restoration (EarthShare Wisconsin)
- Covers the cost of a teacher workshop on how to incorporate nature-based learning experiences into the classroom (Wisconsin Environmental Education Foundation).
- Supplies a bag of high quality treats for rescue dogs, used for training dogs so they can live inside with a new home and family (Independent Charities of America).

**$10 a month**

- Provides one month of energy assistance to someone with disabilities via Broadscope Disability Services (Community Health Charities)
- Helps an adult living with a mental illness connect to local employers to help find the job of their dreams (Community Shares Wisconsin)
- Assures supper for poor children during the summer (Hunger Relief Fund)
- Provides 28 hours of literacy and math tutoring for 2 students, giving them the support they need to succeed in school and stay on track for high school graduation (United Way of Dane County).
- Plants 12 trees thus offsetting 15 tons of carbon dioxide emissions, which the average American is responsible for emitting into the atmosphere each year (America's Charities).
- Purchases adaptive equipment used by amputees and other severely injured veterans while participating in rehabilitative programs addressing their mental and physical healing (Independent Charities of America).

**$20 a month**

- Helps our agency provide special transportation to a work site or community activity that benefits our clients' lives (Access to Community Services)
- Provides educational materials that reflect a person's culture and language from the Alzheimer's Association (Community Health Charities)
- Allows us to give our technical expertise and advocacy advice to someone working to protect a threatened wetland (Community Shares Wisconsin)
- Helps preserve and enhance permanently protected land in Door County (EarthShare Wisconsin)
- Provides 10 preparation classes for 15 adults who will take the GED setting them on the path to stable employment (United Way of Dane County)
- Provides a full day of engaging solar activities for more than 100 children at The Energy Fair (Wisconsin Environmental Education Foundation).

# Special Events for a Successful Campaign!

The following suggestions have been used successfully during past campaigns. For more details on what these events entail, see the longer version of this document on the campaign website: giving.wi.gov.

**Food-related:** Breakfast Treats and Bake Sale, Walking Tacos, Carrot Cake/Crème Puff Café, Ethnic Potluck, Luncheons, One Potato/Two Potato, Ice Cream Social

**Sales:** Media Sale, Cookbook Sale, Trash and Treasure Sale

**Other:** “Boxing” Match, Drawings, Golf Outing, Pumpkin Carving Challenge, Set a Theme, Tug of War/Blanket, Volleyball, Silent Auction, Turn the Radio On

Also, many state agencies and some university units hold large-scale campaign “kick-off” events to raise awareness about the Partners in Giving campaign. Here are some tips that help make these events more successful.

- **Location:** Look for a location where employees frequent. Entryways, cafeterias, or a centrally located conference room can be effective.
- **Time:** Try to schedule your event at a time when there is a lot of employee traffic. Lunchtime or morning/afternoon break times are good. Try to avoid Friday afternoons.
- **Interactive:** If you invite umbrella groups to staff display tables, consider something like a scavenger hunt or a Jeopardy game where those attending have to gather information from the umbrella group representatives about their charities and the issues they work on. Or it could be as simple as obtaining the umbrella group representatives' initials on a card that, when completed, is turned in for entry in a special prize drawing.
- **Speakers:** Endorsement of the campaign from employees in your agency or unit can be very effective. The campaign also offers a speakers bureau with representatives from various umbrella groups or their charities who can speak about the work they do.
- **Food:** Your kick-off will do well if held in conjunction with an ice cream social, chili cook-off, brat fry, or other event involving snacks.

If you plan to schedule a special event that requires attendance by representatives from more than one umbrella group, please contact **Kristi Heming, Special Events Co-Chair**, by phone **(262-6815)** or e-mail heming@chem.wisc.edu to avoid overbooking representatives for special events.

# Special Event Guidelines

**Raffles**
No raffles are permitted, as the Partners in Giving campaign does not have a raffle license. In addition, the purchase of raffle tickets is not tax deductible.

**Drawings**
Drawings are permitted. All employees must be eligible to participate in a drawing. There must be no requirement that an employee give to participate in the drawing.

**Auctions**
Auctions may be conducted under the following guidelines:

1. Proceeds from an auction as a whole cannot be designated to specific umbrellas or charities. However, the donor of any item may designate an umbrella or charity within the campaign to receive proceeds from the sale of the donated item up to a minimum suggested bid set by the donor. The winning bidder may also designate an umbrella or charity to receive any proceeds beyond the minimum suggested bid. The campaign Chair or coordinator for the agency or department holding the auction is responsible for communicating specific designations of this kind to the campaign fiscal agent.

2. Bidders in the auction and persons donating items to the auction should be notified that the deductibility of the bid or donated item should be discussed with their tax advisor.

3. The participants in the auction should not be included in the donor count for the participation calculation determining agency awards.

4. Auction receipts should not be included with regular Partners in Giving donations. The receipts should be sent in a separate envelope. Designations to specific umbrellas or charities (as permitted under #1 above) should be tabulated and noted with the receipts.

5. A separate form must be used to make bids and designations. The Partners in Giving pledge form may not be used.

**Bake, craft, or other sales***
Bake, craft, or other types of sales may be conducted under the following guidelines:

1. No specific umbrella or charity may be promoted as the "designated" beneficiary of the event. The funds must either be undesignated or the person purchasing a specific item may designate a charity or umbrella to receive his/her donation.

2. Participants in the sale should not be included in the donor count for the participation calculation for determining agency awards.

3. Purchasers and donators of sale items should be notified that the deductibility of the purchase or donated item should be discussed with their tax advisor.

4. Receipts from the special event sale should not be included with regular Partners in Giving donations. Receipts should be sent in a separate envelope. If the buyers are given the option of designating their purchases to specific umbrellas or charities, the Partners in

Giving volunteers coordinating the sale need to tabulate and report the designation breakdown in the receipt envelope.

5. A separate form must be used for designations. The Partners in Giving pledge form may not be used.

6. All sale proceeds must go to the Partners in Giving campaign and cannot be shared with any other organization or individual.

*University locations may not allow food sales. Check with your building manager.

*SECC Dane/Partners in Giving Board Policies Revised 2010*

# Coordinator Guide for Online Payroll Deduction Giving

Employees have the option of making on-line payroll deduction or credit card pledges through the Partners in Giving campaign. Step by step instructions on how to make an electronic pledge are available online at (giving.wi.gov). As Coordinators, you will be assigned administrative rights to review pledge detail for your location.

The Fiscal Agent will work directly with the main payroll office to ensure that all online payroll pledges are processed.

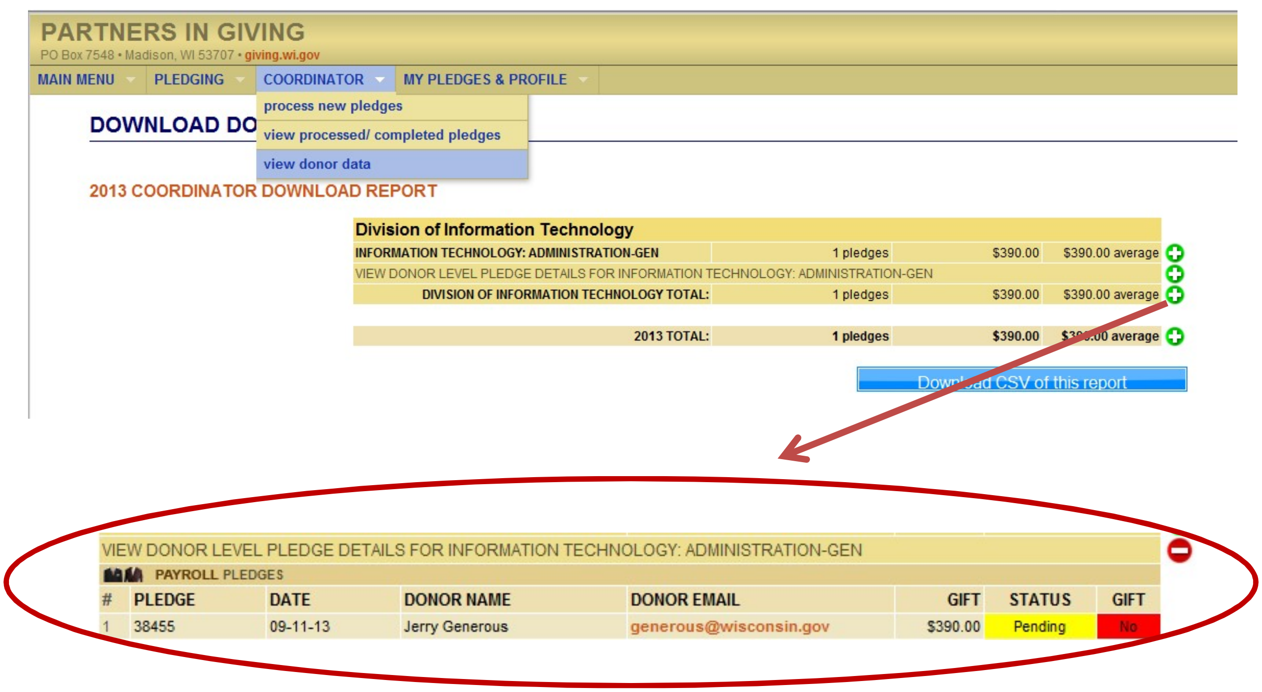
**Step 1: LOGIN**

Follow the steps in the Donation Guide to login to Nexus Partners in Giving online payroll deduction software.

**Step 2: Click on the menu option COORDINATOR > view donor data**

*Please note that Coordinators do not have administrative rights to functionality for the other two options in the COORDINATOR menu.*

The coordinator can review donor detail by clicking on the plus sign on the right.




To download donation detail to a spreadsheet, click on 

# Frequently Asked Questions – Online Giving

**Q: What are the online giving options?**
A: As with years past, credit card giving is still an option. The campaign also accepts payroll contribution pledges online!

**Q: If I give by credit card, when will my card be charged?**
A: Donations made by credit card will be processed immediately unless you elect to make periodic (e.g., monthly, quarterly) contributions, in which case funds will be withdrawn from your account at the intervals you choose.

**Q: Can I change my donation after I've submitted it?**
A: No, you can't change it yourself. You must call Nicholas Wood at 608-246-4342 to assist you with this request.

**Q: Does the charity to which I donate receive my name?**
A: You can choose whether your Partners in Giving donation is made anonymously or not. If you prefer NOT to receive an acknowledgement, check the box that reads, "I would like to remain anonymous."

**Q: I would like to designate my contribution to one or more charities or umbrella groups. How do I do that?**
A: Your designation is recorded in Step 2-Charity Selection and Allocation. An undesignated contribution will be distributed among all umbrella groups. Click the "Add Undesignated" button to make this type of contribution. If you wish to make a donation directly to an umbrella group, expand the appropriate group and click the "Add" button. On the right side of the screen, you will need to indicate the amount you wish to designate for the corresponding charity.

If you want to see a list of charities for a specific umbrella group, click the button which says List View. Click on the umbrella group of your choice. Locate the charity you wish to designate to and click "Add". On the right side of the screen, you will need to indicate the amount you wish to designate for the corresponding charity.

If you want to search for a specific charity, click the button which says Switch to Search Mode, enter a keyword of the charity in the textbox and click on the Search button. This will bring up a list of charities meeting your search criteria. Scroll through your selection until you find the charity for which you are searching. Once you have found your charity, click "Add" then on the right side of the screen enter your donation amount.

Step by step instructions are also included on the Partners in Giving website (giving.wi.gov).

**Q: What will happen if I don't designate my pledge to any of the charities or umbrella groups?**
A: The system will not let you complete the pledging process without designating your pledge. If you wish to make an undesignated pledge, click "Add Undesignated" in Step 2-Charity Selection and Allocation and enter the appropriate amount on the right side of the screen.

**Q: How many designations can I make?**
A: There is no limit to the number of designations per transaction.

**Q: Why am I getting a screen saying "Webpage has expired?"**
A: You may have clicked on the Back or Forward buttons on your browser instead of the buttons in the site. Since Nexus is a secure site, you need to use the buttons in the site.

**Q: Who do I contact if I am having technical problems with online giving?**
A: Please call 608-246-5489 for technical questions.

**Q: Are my personal details and information secure?**
A: The safety and security of your transaction is a primary concern for the Partners in Giving campaign. A high-grade encryption is used along with the https security protocol, SSL, to communicate with your browser software. This method is the industry standard security protocol, which makes it extremely difficult for anyone else to intercept the information sent.

**Q: Will my e-mail address be shared with anyone?**
A: Partners in Giving does not release your information to anyone, except the charities or umbrella groups you have authorized to receive your e-mail address.

**Q: How do I register?**
A: Go to http://giving.wi.gov website and click on the Give Online button.

**Q: Is there a fee or administrative cost for using this system?**
If you are making a credit card donation, there are fees associated with donating online. The credit card company's service charge is approximately 2.5% - 3% per transaction. These fees are part of overall campaign expenses and not deducted from an individual's gift. There are no fees associated with payroll contribution pledges.

# Report Envelope

Partners in Giving

## WEEKLY REPORT ENVELOPE

| |
|---|
| Envelope number: ______ |
| Entered by: ______ |
| Reviewed by: ______ |
| Deposit/Close Date: ______ |
| FISCAL AGENT USE ONLY |

The State, University & UW Hospital and Clinics Employees Combined Campaign of Dane County

**This envelope is from:**

| | |
|---|---|
| Your Name | |
| Your Phone Number | Drop-off Date |

| |
|---|
| Unit for which you are responsible |
| Department Code |

| | Number of Donors | Total Amount | Paid Now | Balance Due |
|---|---|---|---|---|
| A. Cash/Checks | | | | |
| B. Payroll Contribution | | | | |
| C. Special Event/s* | | | | |
| D. Total of A, B & C | | | | |

Description of Special Event/s:

☐ **Check box if this is a final report**

*If special event/s money is enclosed in this envelope, please indicate how much was raised along with a description of the event in the space above. **Do not use a pledge form to record special event/s money.**

## INSTRUCTIONS

### 1 CHECK PLEDGE FORMS FOR ACCURACY AND COMPLETENESS

- Did the donor complete the pledge form (verify signature and/or date)?
- Did the donor indicate how she/he wishes to give (cash, check, payroll contribution)?
- Do the amounts in parts A, B and C of pledge form equal the total donation amount?
- Verifty that the payroll contribution totals are accurate (amount per paycheck x number of periods = total).
- Please return any pink copies of the pledge forms to the donor/s.

### 2 TOTAL THE PLEDGE FORMS AND ENTER INFORMATION ABOVE

- Count each donor.
- The "Paid Now" column for Payroll Contribution gifts is for instances when a donor gives a payroll and a cash or check gift (e.g., a donor giving $52 by payroll contribution and $10 by cash should be included in the "Payroll Contribution/ Number of Donors" box; $62 should be reported in the "Total Amount" Column, $10 in the "Paid Now" column, and $52 in the "Balance Due" column.
- Place cash, checks and pledge forms in envelope and seal.

### 3 DEPOSIT INSTRUCTIONS

**State Chairs or Coordinators:**

- Make and retain a copy of the front of the report envelope for your records.
- Place the white copies of the submitted pledge forms in the report envelope.
- Forward the yellow copies to your payroll office.
- Deliver the sealed report envelope to a designated branch of the Summit Credit Union.

**University Chairs or Coordinators:**

- Make and retain a copy of the front of the report envelope for your records.
- Place the white copies of the submitted pledge forms in the report envelope.
- Forward the yellow copies to the Central Payroll Office, 21 N. Park Street/Suite 5101.
- Deliver the sealed report envelope to a designated branch of the UW Credit Union.

**UW Hospital and Clinics Chairs or Coordinators:**

- Make and retain a copy of the front of the report envelope for your records.
- Place both the white and yellow copies of the submitted pledge forms in the report envelope.
- Hand-deliver the sealed report envelope to the drop-box outside Room G5/160 (the CSC Mailroom).

**Turn in a report envelope every week to ensure timely and proper credit to your department.**
Questions? Call 246-4397

# Confidential Pledges

The Partners in Giving campaign has received requests from employees to develop a process that enables employees to avoid revealing the amount of his/her pledge to Campaign Coordinators.

While most employees will continue to return their pledge forms through their Coordinators, the Partners in Giving campaign hopes the process outlined below will address the needs of contributors wishing an additional measure of confidentiality. The process below will also allow employees to have their pledges included in the campaign total and give the employee the option to contribute by payroll contribution.

The process is similar whether the employee contributes through payroll contribution or with cash or check.

1. The employee should complete the pledge form and place the pledge form (and cash/check, if not payroll contribution) in an envelope and seal.
2. Give the envelope to the department Campaign Chair.
3. The Chair will:
    a. Review the pledge form for accuracy,
    b. Distribute a copy to the employee and the payroll office (if payroll contribution) OR, if cash/check distribute the pink copy to the employee.
    c. Record the contribution amount on the agency totals for depositing at the credit union.

Employees may also choose to make confidential donations directly to their favorite charities. However, contributions made directly to a charity will not be included in the campaign and the employee will not have the opportunity to use payroll contribution. (<u>Note:</u> a check is always preferable to cash, if the employee decides not to use payroll contribution.)

# Who is Counted?

- Personalized pledge forms and Partners in Giving booklets for each employee assigned to you will be delivered to you by early October (including all permanent, project, seasonal, and limited-term employees who work in Dane County).

- Your department's "participation rate" is the number of people who donate to Partners in Giving — including permanent, project, seasonal, and limited-term employees — divided by only the number of permanent employees. (We do not count contract employees for participation, as they are not employees of the state agency or university unit. We can only accept credit card, cash or check because they are not paid by the state and their contributions cannot be made through payroll deduction. They may also participate in special events if they choose.) See the table below.

- Does this mean that it is possible to have a participation rate over 100%? Yes, indeed! Go for it.

- Report to your department's Partners in Giving Chair any corrections in your list of employees, including the names of any staff members on the payroll here but on assignment outside of Dane County.

- If you are missing a personalized pledge form for any employee, please have the employee complete a blank pledge form. If you receive a personalized pledge form for an employee who is not in your department, please destroy the form.

HOW TO DETERMINE THE TOTAL NUMBER OF PERMANENT EMPLOYEES

| | | |
|---|---|---|
| Total number of employees within the department (do not use the full-time equivalent number) | | (1) |
| Employees on extended leave | (2) | |
| Employees not headquartered in Dane County | (3) | |
| Limited Term Employees/Grad Assistants | (4) | |
| Total number of employees to be subtracted (2 + 3 + 4) | | (5) |
| Net Permanent Employees (1-5) | | |

# UW Credit Union Branches (UW & UW Health Employees)

**UW Campus - West**
1435 Monroe Street
Madison, WI 53711
232-5000

**UW Campus - Union South**
1308 W Dayton Street
Madison, WI 53715
232-5000

**UW Campus – Central**
662 State Street
Madison, WI 53703
232-5000

**University Avenue**
3750 University Avenue
Madison, WI 53705
232-5000

**Capital Square**
44 E Mifflin Street
Madison, WI 53703
232-5000

**Preferred drop-off location
Visit UW Credit Union's website for complete hours. http://www.uwcu.org/

# Summit Credit Union Branches (State Employees)

**__**Downtown__**
307 East Wilson Street
243-5000

**__Hill Farms__**
4802 Sheboygan Avenue, Room 150B
243-5000

**__City Station__**
670 West Washington Avenue
243-5000

**__Rimrock__**
2424 Rimrock Road
243-5000

**__Thierer (East)__**
1799 Thierer Road
243-5000

**__Fitchburg__**
2939 South Fish Hatchery Road
243-5000

**__Westport__**
5419 Blue Bill Park Drive
(Corner of Highway M & Blue Bill Park Drive)
243-5000

**Preferred drop-off location

Please note that all Madison-area Summit Credit Union locations currently accept envelopes. The list above represents the most frequented locations. Visit Summit Credit Union's website (www.summitcreditunion.com) for additional locations & hours.

# Eligibility Requirements for Charities

Each charity participating in the State, University, and UW Health Employees Combined Campaign is screened by a committee of state and university employees to ensure that the charity meets the following eligibility requirements:

- Is a charitable organization;
- Is a member of a participating umbrella group;
- Uses the funds contributed by state employees for the announced purposes;
- Submits a copy of an IRS certificate showing that it is a tax-exempt, non-profit organization under Section 501 (c) (3);
- Has registered with the Department of Financial Institutions and filed annual reports;
- Has a detailed annual budget prepared and approved at the beginning of each fiscal year by its board of directors;
- Follows accepted fundraising practices;
- Has a formal policy and procedure of non-discrimination;
- Prepares an annual report that
  - ◊ is available to the general public,
  - ◊ includes a full description of its charities,
  - ◊ identifies the types of solicitation it uses to obtain contributions,
  - ◊ gives the names of its chief administrative personnel,
  - ◊ makes full disclosure of the sources and uses of contributions.
- Has furnished information with a certification by an independent certified public accountant showing that it follows standards of accounting and a financial system that is based on generally accepted accounting principles.

➢ **The Eligibility Committee is issue-neutral.**

**If you disapprove of a charity simply designate the charities you wish your gift to support!**

Be assured that your gift will go only to the charities you choose.

™

# Partners in Giving