

## United Way Team Captain Manual 2023

Thank you for being a leader and dedicating your time, energy, and passion to the 2023 Ball State University United Way Campaign! We would not be able to do it without you!

As a Team Captain, you make change happen in our community by sharing the United Way message. Remember that the work you are doing is an important way to connect the Ball State community with the needs of Delaware County. This is an opportunity to reach people who might not ever face poverty, food scarcity, or homelessness in their day-to-day life, and help them understand the impact their generosity makes on those who face these realities within our community.

Fundraising should never be intimidating. The number one reason why someone doesn't donate is because they are not asked. Let your enthusiasm and creativity shine through, and your efforts will pay off. It takes people like you, who go above and beyond, to make this campaign successful. Thank you for joining us!

### **Key Responsibilities:**

- Attend United Way Team Captain Training.
- Promote United Way throughout your teams and departments.
- Coordinate the distribution and collection of campaign materials and invite everyone on your team to give.
- Inform the Campaign Coordinator of any changes to the members of your team for accurate participation rate reporting.
- Educate yourself and your co-workers about United Way's role in the community. Use the United Way Team Captain Dashboard to find plenty of resources and keep an eye on messages for more information.
- Encourage volunteerism among your co-workers. Promoting participation in the United Way Day of Action is an easy way to do this!
- Be creative – organize some cash fundraisers or contests for your team, make it competitive!
- Attend United Way kickoff and celebration events, if possible. You don't want to miss the fun!
- Make your team's experience fun too!
- Provide all donations to Campaign Coordinators in a secure, organized, and timely manner.
- Say "thank you" to your team members who participate.
- Evaluate your experience and make recommendations for next year.

### **Important Information for 2023**

#### **Matching Funds**

- The cap for the Ball Brothers Foundation match this year is \$75,000!
  - Donations increased from last year's gift will be matched \$1:\$1 on the increased amount only.
  - Any new unrestricted gifts, or any donor who previously designated but now chooses to give unrestricted, will be matched \$2:\$1.

### NEW Equity Advancement Fund!

An Investment Option that specifically supports efforts serving underrepresented or under-resourced persons in our communities.

- New option has been added to the 2023 Pledge Forms, as well as E-Pledge and Mobile Cause.

### Tag Line

The tagline for the 2023 Campaign is “Give from the Heart”.

### Team Captain Dashboard

This year, our friends at United Way have created a NEW one-stop dashboard to give United Way Team Captains an easy place to access Ball State United Way Campaign resources, information, and ideas!

- Visit <https://heartofindianaunitedway.org/bsu-toolkit/> to find:
  - Ball State branded posters and fliers to download and print
  - This Manual!
  - The 2023 BSU Pledge Form PDF to email and/or print as needed
  - Donation Menus
  - Tips for Making the Ask
  - Community Resource Guides
  - Funded Program List
  - Information about Heart of Indiana United Way, why their initiatives are so important to the wellbeing of our community, and how they operate

### Leadership Level Giving Reception

President Mearns will welcome those who go above and beyond for United Way into his home at Bracken House in Spring of 2023 for a reception to thank them for their generosity!

To be considered a Leadership Level donor:

- Professional Staff and Faculty (Those with an Employee Classification starting with a P or F) must donate a minimum of \$1000
- All other staff levels (Employee Classification starting with A, B, E, N, or T) must donate a minimum of \$500

### Student Volunteer Helper Opportunity

We understand that our amazing Team Captains are stretched thin at this time of year and putting all you can into this Campaign, even if you wish you could do more! Well now you have the option to recruit helpers to assist you in making your Campaign dreams a reality!

- Team Captains may recruit Ball State Students to help you with Campaign related tasks or activities for official community service hours that can help them with scholarship, fraternity/sorority, or other program requirements.
  - Students can report hours worked by signing up on Give Pulse under Community Engagement, then Ball State United Way Employee Campaign as a Team Captain Fundraising Assistant.
  - The supervising Team Captain will record the number of hours worked on United Way Campaign related tasks or activities and report them to me **after they have been completed.**
  - I will approve requested hours based on Team Captain reports.
- They can assist with tasks like:
  - Passing out pledge forms and envelopes to those who wish to donate physically.
  - Creating communications for team members to educate them about United Way's role in the community and encourage donations.
  - Hanging Campaign posters in shared spaces for your team.
  - Organizing and/or executing small cash fundraiser events for the team.
  - Thanking team members that choose to participate by handing out thank you notes or small gifts like candy.

### **What to Expect from Your Campaign Coordinator**

Updates – I will be providing update emails once per week, from the first week of October through the last week of November.

- Updates emails will include:
  - An update of the current University Campaign Total and Participation Rate
  - A spreadsheet listing the Participation Rate for each individual team.
    - You may respond to these emails or send separate requests for team information like names of donors, total amount donated to date, which of your team members are new donors, or any other questions you may have, **except the contribution amount of an individual donor.**
      - This information is up to the discretion of the donor to share.
      - I, as the University Campaign Coordinator, have access to donation amounts for processing, but can only share this information with Payroll or with permission from the donor.
      - **Please use the same level of discretion as a Team Captain!**
        - You may become aware of an individual's contribution, please do not share this information with anyone without written permission from the donor.
        - **Any Team Captain Envelopes that are turned in should remain sealed and be delivered to me** via Campus Mail or brought in-person to the Office of Community Engagement at Oakwood 122, to be stored in my locked office if I am not there.

- Once the **Campaign ends on November 30<sup>th</sup>**, I will send individual emails within the month of December outlining your team's final participation information.
- The final University Campaign totals will be reported in January in an email from the President.

Materials - Most of the resources you need can be found on the Team Captain Dashboard at <https://heartofindianaunitedway.org/bsu-toolkit/> , but via email you should have received:

1. Your Team List
  - a. This was generated by organizing all employees on campus into the most cohesive teams for easy reporting, so it may be a little different compared to past years.
  - b. Please let me know if anyone leaves or joins the departments or offices you represent during the Campaign to keep our participation rates accurate.**

You will receive the following in a packet at the Team Captain Training Sessions or via Campus Mail:

2. Pledge Forms – We have provided you with enough pledge forms for 1/3 of your team.
  - a. The use of E-Pledge or Text to Donate options is highly encouraged, but some still prefer the physical option.
  - b. Just email Bianca if you need more and are unable to print them from the PDF on the Team Captain Dashboard or at [bsu.edu/unitedway](http://bsu.edu/unitedway).
3. Confidential Envelopes – Please provide an envelope with each form.
  - a. We will gladly accept any leftover blank forms and envelopes after Campaign.**
  - b. Just email Bianca if you need any additional envelopes.
4. Customizable Campaign Poster!
  - a. Outlines 3 ways to give with lines to add details that are most important to your team.
  - b. Suggestions for what to write:
    - i. Dates of Campaign (9/25 - 11/30)
    - ii. Why you give
    - iii. Team Fundraising Goals
    - iv. Competition or Fundraiser Event Details

#### Donation Collection

1. Non-Cash donations can be sent via Campus Mail **until Thursday November 16<sup>th</sup>**, after this date please arrange to have all donations dropped off to or picked up directly by me.
2. **Campus Mail or Office Delivery Address:**

**Bianca Sulanke**  
**Oakwood Building (OW)**  
**Room 122**

**\*Please Note! If you are aware that someone has donated with cash or you have collected it through a fundraiser, we would prefer to avoid sending it through campus mail. You can either drop it off to us at the same address or request that we come pick it up from you.\***

Support – I am here for you! If you ever have any questions or concerns, or even just ideas that you want to share, please reach out to me. My contact information is as follows:

Bianca Sulanke - [besulanke@bsu.edu](mailto:besulanke@bsu.edu) - Office Phone: 765-285-4830 (Please leave a voicemail if you would like a call back or send an email with your availability for a return call)

### **Setting Goals**

Another great way to bring your team together and inspire donations is to set goals as a group. Many people are motivated by having a benchmark to reach, and creating excitement by letting your team choose their goals as a group can help everyone feel invested in the process.

- If you have a bulletin board in a shared office space, you can post your team’s personal goal and create a visual representation to show your group’s progress and keep momentum going.
- An incentive like bringing in food for the whole team if you meet your goal may be a helpful tool to keep everyone engaged.
- There are a couple of different goal options you could work towards.
  - Participation Rate – While our suggested goal is 30%, maybe your team thinks they can get to 50% or even 100%.
  - Total Contribution – Many teams have had success by setting a total Giving Goal. If team members see that giving an extra \$5 or \$10 will push the total closer to your goal, they may be inspired to give more generously.
    - ***I can provide Team Donation Totals to date upon request, but I am unable to share specific donation amounts from individual donors.***

### **Tips for Making “The Ask”**

- Be Direct – Ask for specific amounts. Setting a team goal is a great way to do this!
- Pull at the Heartstrings – If you have personal stories of the impact these programs have made in the lives of yourself or people you know, share them!
- Be Relatable – Many of your team members will have children or family members that could benefit from programs like these, or at least interact with people in their daily lives who could.
  - Appeal to your department’s passions and interests in your emails.
  - For example, the Psychology team was inspired by the psychological impact that poverty and crisis have on the minds of young children.
- Be Logical – In a college setting, many people tend to trust data and real-life applications of concepts the most, use this to your advantage!

The number one reason why people don't give is because they are not asked. It is easy to do and there are a few different ways to go about it.

Group Ask - A successful way to ask employees to contribute is through a group presentation. Bring your team together to view the United Way campaign video, receive United Way literature, and have fun!

- This enables a consistent United Way message to be presented to all employees and saves you and your team time. It is flexible and can be adapted to your needs.
- If your team consists of various different offices or departments, it may be more efficient to do multiple smaller meetings rather than one large one.

One-On-One Ask - Provide a more personal approach through one-on-one discussions. Peer-to-peer conversations often result in greater participation rates.

- This approach allows contributors time to ask questions and hear first-hand about community needs and the services that are available.
- Benefits of this method include the ability to tailor the United Way message to each individual, the opportunity to give the contributor facts about United Way, and a way to encourage previously non-participating employees to contribute.

### **Cash Fundraiser Ideas**

**\*Please Note! Donor names of ALL fundraiser participants are required for our participation goals!\***

#### Ways to Participate

1. Specific Amount – For example: Anyone who wants to participate needs to donate \$5 in cash at the time of the fundraiser.
2. Any Donation – Pick a date right before your fundraiser and make sure everyone on your team knows they need to make any size of donation in some format by that date. Then I can provide you with a list of all the donors on your team who are eligible to participate the morning of your fundraiser.
  - a. **Please make sure to make this request at least 2 weeks prior to the date you will need the donor list, so I can have it on my calendar to send you the info.**

Text to Donate - We can set up a unique Text to Donate keyword for your team, fundraiser, or event!

- Simply email Bianca Sulanke at [besulanke@bsu.edu](mailto:besulanke@bsu.edu) and [cshendershot@heartofindiana.org](mailto:cshendershot@heartofindiana.org) with the details of your event **at least two weeks before it occurs.**
- C.S. will work with you to help create a unique keyword for your event.
- Payroll deduction is **not an option** through Mobile Cause. Make sure to offer the E-pledge link or paper pledge form for anyone who wants to make a payroll donation at this time.
- Once your event is over, C.S. will send a report of everyone who donated with your unique keyword, and I will send you the total collected during your fundraiser, as well as an update of your team's participation rate.

Contests – Everyone loves a good competition! Have your team members donate a few dollars to participate in one of these fun ideas or come up with your own variation. If it doesn't come with a built-in prize, you can provide something simple like candy or a dollar store trinket for the winner.

- Amount of Candy in a Jar or Weight of a Pumpkin – Fun fall-themed options with built-in prizes!
- Change for a Change – Give each department or office their own jar and whoever collects the most money by the end wins!
- Motivated Group Goals – Work together to reach a certain participation rate or dollar amount to get a member of the leadership in your area to do something entertaining!
  - Great examples from past years include a funny Halloween costume or a pie in the face!
- Beat the Master – Is someone on your team particularly skilled at something like chess or basketball?
  - Take donations from other team members to challenge the “master”, with a prize for anyone who beats them. Past “masters” have chosen to take it a step further and match the donations if they lost to the challenger.

Events – Team Events are a great way to boost excitement and provide an opportunity for camaraderie while also donating toward a great cause! Charge a small amount for “admission” and allow additional donations as well. Be sure to offer extra pledge forms and envelopes in case people decide they would like to pledge that way during your event. Here are some suggestions to get you started.

- Casual/Hat/Costume Day – Participants can pay to wear something special for the day, as long as the management of your office is onboard.
- White Elephant Balloon Raffle – Team members donate small items (useful or not) and the name or number of each is put in a balloon. Donate a set amount to pop a balloon and get the corresponding prize.
- Chili Cookoff (or whatever food your team wants) – If a few people on your team are interested in competing for the title of Best Chef, other team members can pay for a plate including a sample of each dish and vote for their favorite!
- Bake or Craft Sale – Not just for their team but also for students and anyone else who passes by and is interested in contributing to a good cause for a homemade treat!

### **How to Thank Donors**

You are United Way's Ambassador for your team and showing appreciation to those who donate toward this worthy cause is so important. These donations are not just getting us closer to our fundraising goals, but also improving the lives of those in our community.

- Positive feedback is the best way to ensure repeat donations and remind donors of the life-changing impact their generosity makes.
- United Way will provide tax receipts for direct donations and individuals who give through payroll will refer to their W-2. However, everyone appreciates it when they are authentically recognized, even when it's a simple, “thank you.”

Email – The easiest way to thank your team's donors all at once is to send an email to your whole team thanking those who participated.

- This method relieves any worries people may have about the anonymity of their donations. It also keeps those who chose not to participate this year involved in a positive way, which could lead to future participation.
- You could also use this opportunity to remind your team that another great way to contribute is through volunteering, whether they were able to donate or not.

In Person – If team members turn in their donations directly to you, participate in a contest or event, or choose to let you know that they donated via E-pledge, a personal and heartfelt “Thank you” would mean a lot to them.

- We are often too busy to connect to people at work, but just taking the time to look them in the eyes and express your gratitude will truly make them feel appreciated.

Cards or Notes – A simple thank you card with a personalized message is a lasting reminder of the thankfulness that everyone involved in this campaign and United Way feels toward that donor.

- Having a physical representation of their generosity can bring back positive feelings associated with helping others every time they see it and inspire them to donate again in the future.

Gifts – In the past, Team Captains have had positive responses to giving out a small piece of candy or inexpensive gifts to donors.

- If you want to narrow it down to just New Donors or those who donate at the Leadership Level, just request this information from your Campaign Coordinator and I can provide it for you.

## **FAQ**

Here are some good ways to answer frequently asked questions that may be brought to you. If you get a question that you are not sure how to answer, you can always forward it to your Campaign Coordinator and I will be happy to help you find the right words to say.

### **Q: What should I do if I am having technical difficulties with the E-Pledge Website?**

A: First ask them to make sure that they have tried it on a BSU connected desktop or laptop computer in a Google Chrome Browser. While the system should work on most mobile devices or tablets, some devices may be less compatible than others. If they are on the right device and browser, please try clearing the cache and cookies in the Google Chrome browser before trying to donate one more time.

If they continue to experience issues, please provide the following pieces of information to your Campaign Coordinator right away.

- Exactly what the issue is
- The exact wording of any error notifications received (screenshots or snips are encouraged)
- What device and browser are being used
- The date and time of the error
- The donor’s name and contact information



**Q: Why should I give to United Way instead of giving directly to an agency?**

A: Charitable giving is a personal decision and United Way encourages you to do what is most comfortable for you. A gift to United Way is an investment that benefits the entire community, not just one program, issue, or population. When you give to United Way, you are providing solutions to the most critical human-care issues in our community. You become part of a coordinated, community-wide effort that brings about the changes that matter most where you live and work.

United Way conducts research to ensure donor dollars are addressing the most pressing community needs in the areas of education, health, and financial stability. We leverage your gift by strategically investing in results-driven programs and initiatives that address these most pressing needs. We monitor these funded programs and initiatives to make sure they are efficiently and effectively improving people's lives and making a positive impact.

Contributing through your workplace campaign allows your gift to be spread over the course of a year through payroll deductions - making it easier for you to support programs and initiatives throughout Delaware County. If you have a special interest in one of our impact areas — health, education or financial stability — you can designate your gift to that. If there is a specific non-profit you'd like to support, you can also designate all or a portion of your gift to them.

**Q: Who really benefits from United Way funding?**

A: We all do. By strategically funding 42 local and direct programs, we are making strides towards a better tomorrow for all of Delaware County. All donations stay local to the Heart of Indiana region. You can, if you choose, select a specific county in the region to designate your gift to – Delaware, Fayette, Henry, Madison, or Randolph. Undesignated gifts will go to the area of greatest need throughout the communities we serve. When you give to United Way, you are making an impact in multiple ways. You are investing in the health, education, and financial stability of your whole community. When you give to a single agency, your impact, while still valuable, is limited to their singular mission.

We invest in programming that puts children and families on a pathway out of poverty. This includes 10 organizations taking part in the THRIVE Network, 12 organizations and programs in the Campaign for Grade Level Reading, and 19 organizations providing safety net services. The THRIVE Network provides one-on-one coaching and support to help families to increase income, build savings, and acquire assets. The Campaign for Grade Level Reading ensures all third graders are reading at grade level and includes some of United Way's direct programs like Summer Book Give Away, Read United, and Dolly Parton's Imagination.

**Q: Does part of my donation go towards paying United Way Staff?**

A: Every gift is transformational in the lives of people who benefit from United Way funding. With the merger, Heart of Indiana United Way anticipates continuing to keep their overhead under 20% of their

budget. And, this year, George and Frances Ball Foundation has once again granted funds to help cover most of their overhead, so that the most of your gift goes toward transforming people's lives.

Transparency is one of our organizational core values and we adhere to stringent standards of accounting and financial reporting. Heart of Indiana United Way was formed in 2021 as a merger between United Way of Delaware, Henry and Randolph Counties and United Way of Madison County. Audited financials and IRS Form 990s may be found [here](#).

**Q: Is United Way a National or Local organization?**

A: Heart of Indiana United Way is a local autonomous nonprofit organization. We are governed by a local volunteer Board of Directors. Heart of Indiana United Way is independent and self-governed. As a member of United Way's worldwide network, we meet annual membership requirements and pay nominal dues, then in exchange, we receive important cost-saving services, support, and benefits such as staff training, community research information, national advertising, public policy support, ongoing consultation, and the ability to draw on "best practices" of United Ways throughout the world.

We serve a five-county region in Indiana: Delaware, Fayette, Henry, Madison & Randolph. All money raised in the region, stays in the region to impact local communities. You can, if you choose, select a specific county in the region to designate your gift to – Delaware, Fayette, Henry, Madison or Randolph. Undesignated gifts will go to the area of greatest need throughout the communities we serve.

**Q: What does United Way do in addition to raising funds?**

A: United Way is a catalyst for change and positive outcomes for our community. United Way researches and plans for future community-wide needs, as well as recruiting and training volunteers. We focus our efforts on responding and adapting to the changing social conditions and human needs. United Way also convenes leaders, decision makers, and key stakeholders to address issues that affect us all.

United Way has been responding to local needs and our community's most pressing problems for nearly 100 years. We fight for the health, education and financial stability of every person in every community. We lead and fund local programs that help provide solutions to critical problems – our priority being the struggle of local, hard-working families to become financially stable both today and for the next generation.

**Q: In addition to my donation, how can I engage with United Way?**

A: Individuals, businesses, and community partners can support our work in several ways – by volunteering, advocating alongside us on policies that impact local families, making a financial contribution, hosting a workplace giving campaign, and joining in our work. No matter how you choose to help, big or small, you will be making a difference.

Volunteers are the heart and soul of United Way. We offer a variety of opportunities for people to make a difference in our community. Check out our website - <https://heartofindianaunitedway.org/>.

**Q: Is my United Way gift tax deductible?**

A: Yes. Your contribution is tax deductible. The extension on charitable deductions allows most Americans to deduct donations to charities from their taxes when they file for 2021. Eligible taxpayers can deduct up to \$300 when filing individually and \$600 when filing jointly in charitable contributions.

**Q: What is United Way's Privacy Policy?**

A: United Way is committed to protecting the privacy of our donors and other individuals from whom we collect personal information. We ensure that all personal information is properly obtained and used only for the purposes for which it is collected. It is disposed of in a safe and timely manner when it is no longer required.

**Q: What if people want to designate their donation for organizations that do not receive funding from United Way currently?**

A: You can indicate the organization you would like your gift to go to online or on your pledge form. United Way can direct the gift to any 501c3 organization. It is helpful to provide the exact name and address of the organization on the pledge form. A United Way representative will reach out to offer other options if their designation does not meet the necessary requirements. However, any designated donation will not qualify to be matched.