today’s topic points

- What is Our Promise?
- United Way’s Role
- State Employee Benefits
- Fees
- Results and Goals
- Roles and Responsibilities
- The Pledge Form
- FAQ’s
- Key Campaign Dates
- Social Media
- Best Practices
- Contact Info
what is our promise?

1. State Law: Govt. Code § 14659
2. Department of General Services (DGS) governs Our Promise
3. State Controllers Office (SCO) controls payments
what is united way’s role?

Under DGS’s MOU, United Way:
• Facilitates departmental campaigns
• Distributes money to designated organizations
• Provides ongoing donor and volunteer support
• Acts as fiscal agent
state employee benefits

- Can benefit any recognized 501(c)(3)
- $5/month minimum
- Friendly competition among Agencies
- Ease of giving monthly through pay warrant
- Monthly donations allow nonprofit better budgeting

Our Promise binds all state workers to one common cause
continue your legacy into retirement

• Easy for retirees to give too!
• Deducted directly from your CalPERS Pension
• Participate in the Leaders United Program through Retired Annuitants(RA)
14% Total Overhead Fee
SCO deducts $0.35 per transaction
-Subject to change pending SCO’s annual review

Breakdown of overhead fee

- 8% UWCCR Processing
- 5.5% Local United Way
- 0.5% Department of General Services
results & goals

• Raised $5,915,059 in 2018
• 3.5% decrease from 2017
• 11% state employee participation
results & goals (cont.)

- 100% Ask
- 13% Participation
- Increase $ on current gifts
- Have fun while helping nonprofits
KCC ROLES AND RESPONSIBILITIES

• Sign and turn in the 2019 Confidentiality Agreement Form (required)
• Work closely with Department Campaign Chair (DCC) to achieve objectives in Campaign Plan
• Make an informed and educated ask of every employee assigned to you
• Remember our goal, “100% Ask!”
• Answer questions and refer to FAQ’s for help
KCC ROLES AND RESPONSIBILITIES (Cont.)

- Assist in conducting campaign presentations, kick-offs, events
- Distribute and collect pledge forms
- Ensuring employees have properly completed their pledge forms
  - Provide Our Promise Confidential Envelope to donors, if desired
  - Verify Cash/Checks received for one time donations
- Lock and secure all collected pledge forms
### the pledge form

- Distribution to employees
- Completion by employees
- Collection by Key Connector
- Audit by Key Connector
- Return to Our Promise
- Submission to SCO
- Set up designations to nonprofits
- Optional to complete,

- not mandatory
2019 pledge form

Box A-E

- Required by the State Controller to be completed exactly as appears on Pay Warrant, including full Social Security Number
- **Box E**: if there is “XXX” then they are not currently a donor
- Contact Information: In case of donation/Nonprofit Issues
2019 pledge form

Manage Donation

• Select only ONE Option: 1-7
• If applicable, enter monthly amount AND annual total

[Table with options for managing donations]
2019 pledge form

Select Nonprofits

- Select from Nonprofit Guide (NPG) or website listing
- Not in the NPG? Write in at the bottom!
- Place monthly AND annual donation amount on the right

### SELECT NONPROFIT(S)

<table>
<thead>
<tr>
<th>NONPROFIT NAME (If left blank, funds will go to support your local United Way)</th>
<th>OP CODE#</th>
<th>MONTHLY AMOUNT ($5 MINIMUM)</th>
<th>TOTAL ANNUAL DONATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td></td>
<td>$</td>
<td>$</td>
</tr>
<tr>
<td>2</td>
<td></td>
<td>$</td>
<td>$</td>
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<tr>
<td>3</td>
<td></td>
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<tr>
<td>4</td>
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</tr>
</tbody>
</table>

**WRITE IN YOUR FAVORITE NONPROFIT:** If your preferred nonprofit is not listed in our guide, and they have a current 501(c)(3) filing, please visit GuideStar.org to easily find their EIN/TAX I.D. # to complete this section.

<table>
<thead>
<tr>
<th>NONPROFIT NAME</th>
<th>CITY/STATE/ZIP #</th>
<th>PHONE NUMBER</th>
<th>EIN or TAX I.D. #</th>
</tr>
</thead>
<tbody>
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</table>

- NEED MORE SPACE? Check this box. Fill out an additional pledge form with the CONTACT and SELECT sections only. Total all pages and sign the first page only. Submit all pages together.
2019 pledge form

Sign, Date, and Confirm $ 
- Only use ink
- Donor must confirm total annual amount they wish to donate

SIGN
I authorize the state controller to release my donation and UWCCR to process my selected donations to my nonprofit(s) as indicated.

CONFIRM TOTAL DONATION
SHOULD MATCH TOTAL ANNUAL DONATION LISTED IN G, L, K, OR L

SIGNATURE REQUIRED (INK ONLY) $  
DATE

ONLY PLEDGE FORMS WITH ACTION REQUIRED NEED TO BE RETURNED.
For more detailed information, visit OurPromiseCA.org.

THANK YOU!
FAQ’s from Donors

• “I am unsure about providing my SSN to a Key connector.”

• “I can send my nonprofits a check monthly. Why should I give through Our Promise?”

• “I can’t afford to give much more than $5 a month. Does that amount really make a difference?”
2019 key campaign dates

Aug. 28: Our Promise Kick Off
State Capitol 11 a.m. – 1 p.m.

Sept. 1: Campaign Begins

Oct. 31: Campaign Ends

March 2020: Thank You Breakfast
SNAP, SHARE, SOCIALIZE

HOW WILL YOU JOIN OUR PROMISE?
Share your stories and photos on Facebook, Twitter and Instagram.

/OurPromiseCA
#OurPromiseCA
Best Practices

- Conduct a strong educational campaign
- Believe in Our Promise and the worthy nonprofits it supports
- Bring nonprofits in to your campaign
- Do not take rejection personally
- Make it personal/tell your “story”
- Communicate throughout the campaign
meet the our promise team

BENJAMIN ACEDO
manager
O: 916.368.3015
C: 626.319.7337

TABITHA ANGEL
director
O: 916.856.3947
C: 916.549.0991

ANGELIKA WILLIAMS
admin. assistant
O: 916.856.3959
C: 916.208.3934
FOR CUSTOMER SERVICE, PLEASE CONTACT 888-863-6466
FOR DETAILED CAMPAIGN INFORMATION, VISIT www.OurPromiseCA.org
THANK YOU for making California a better place to live, work and play!