



# 2025 EMPLOYEE CAMPAIGN MANAGER TRAINING

**UNITED IS  
THE WAY.**



# TODAY BROUGHT TO YOU BY



- Welcome & Introductions
- United Way's Focus and Funding
- Partner Agency Q&A panel
- 2025-2026 Campaign
- Championing United Way
- Campaign Resources
- Next Steps...

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**UNITED WAY**  
Ozarks Region



# YOUR UNITED WAY ACCOUNT MANAGERS



**JANELLE MITCHELL**  
VICE PRESIDENT OF DEVELOPMENT



**BRANDI VANANTWERP**  
PRESIDENT & CEO



**LIZ THRASHER**  
DIRECTOR OF DEVELOPMENT





# INTRODUCTIONS

- 1 Tell us your name & company
- 2 How long have you been an ECM?





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**FOCUS AND FUNDING**





# OUR MISSION

United Way Ozarks Region unites people, resources and ideas to enhance lives in the Ozarks.

# OUR VALUES

Accountability. Collaboration.  
Impact. Inclusivity.





# CHAMPIONING CHILDREN

Ensuring our community's children  
reach their full potential, by  
achieving milestones in  
development, education and health.

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# PATHWAYS OUT OF POVERTY

Helping people build brighter futures  
through stable housing, workforce  
readiness and financial literacy.



# COMMUNITY INVESTMENT FUND

THE MOST POWERFUL WAY TO IMPACT YOUR COMMUNITY

WHEN YOU GIVE THROUGH UNITED WAY, WE IMPROVE  
MORE LIVES IN MORE WAYS THAN ANY SINGLE AGENCY CAN.

- Allocations, based on undesignated dollars, are determined by a panel of donor volunteers
- Identifies gaps and reduces duplication of services
- Investment is made where the need is greatest
- Programs are effective and financially stable



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## PRIORITY PARTNER



O'Reilly Center for Hope



Access to Mental Healthcare

Parental Mental Health Wellness and Skills Enhancement Program

- FUNDING 20 PROGRAMS AT 15 NONPROFIT AGENCIES
- SERVING INDIVIDUALS IN 14 COUNTIES.



Child Advocacy Center  
GIVING A VOICE. NURTURING HOPE.

Forensic Services  
Protecting Our Youth



Math and Reading Buddy Program



Shape-up Program



CASA Clubhouse

Child Advocacy





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Pediatric Therapies



New Pathways for Good Dads



Community Outreach Program  
Emergency Shelter



Ozarks Family Resource Center



Reading Tutoring



Counseling and Education  
Crisis Intervention and Advocacy



Weekend Backpack Program

- **FUNDING 20 PROGRAMS  
AT 15 NONPROFIT  
AGENCIES**
- **SERVING INDIVIDUALS  
IN 14 COUNTIES.**



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**PARTNER AGENCY Q&A PANEL**



# LET'S HEAR FROM OUR PARTNERS



**BOYS & GIRLS CLUBS  
OF SPRINGFIELD**

**SHAPE-UP PROGRAM**



**Victim Center**

**PREVENTION. INTERVENTION. EDUCATION.**

**COUNSELING AND EDUCATION**

**CRISIS INTERVENTION  
AND ADVOCACY**



**Big Brothers  
Big Sisters®**

**OF THE OZARKS**

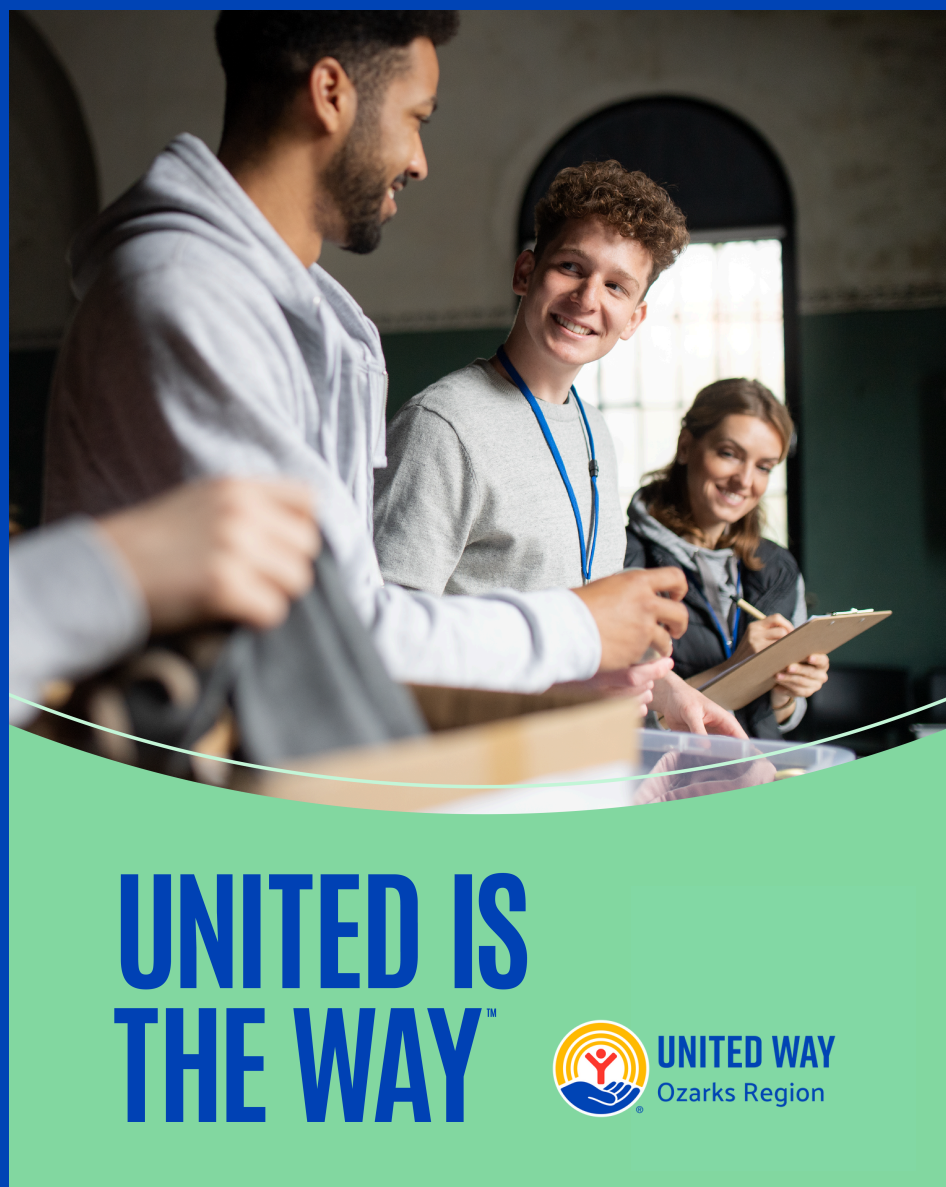
**COMMUNITY-BASED  
ONE-ON-ONE MENTORING**





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**2025-2026  
CAMPAIGN**





# 2025-2026 CAMPAIGN CABINET CO-CHAIRS



**DR. GRENITA LATHAN**  
**SPRINGFIELD PUBLIC**  
**SCHOOLS**



**BILL HENNESSEY**  
**MERCY SPRINGFIELD**

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# 2025-2026 CAMPAIGN CABINET



- BILLY DOVE - JOHN DEERE REMAN/417FOODIST
- JASON FINKE - AECI
- JANELLE HAIK - 417
- BILL HENNESSEY, CO-CHAIR - MERCY
- SANDY HOWARD - RETIRED
- CHRIS JARRATT - REVEL ADVERTISING
- GRENITA LATHAN, CO-CHAIR - SPS

- JULIE MASTERSON - RETIRED
- JUSTIN MCCARTY - CENTRAL LABOR COUNCIL/PLUMBERS & PIPEFITTERS LOCAL 178
- KEITH NOBLE - COMMERCE BANK
- STEPHANIE O'CONNOR - CITY UTILITIES
- JASON RADER - RETIRED
- ANTHONY ROBERTS - CBCO

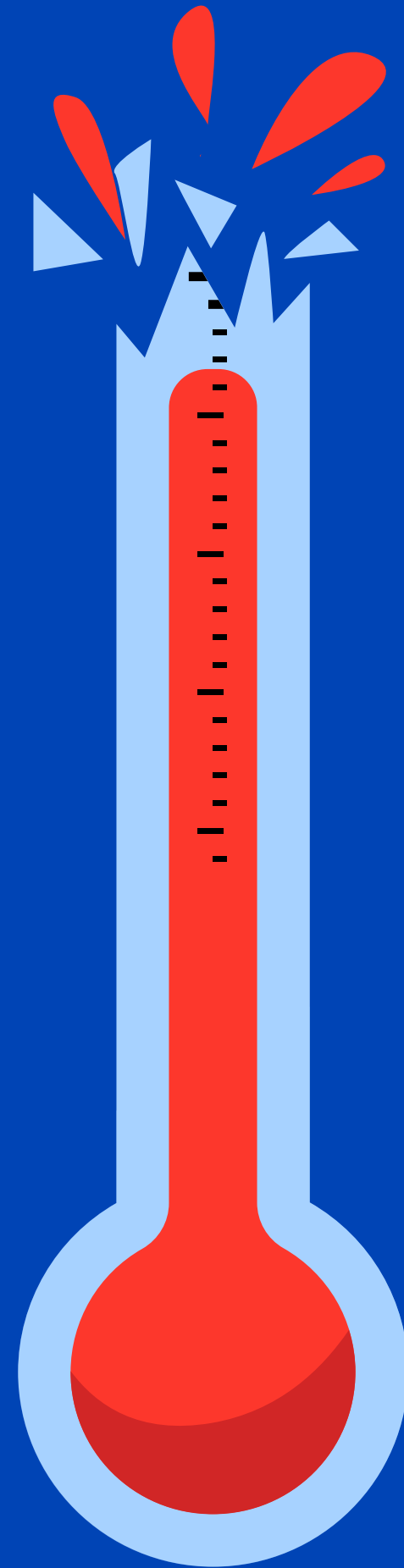
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# CAMPAIGN GOALS

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STRETCH GOAL  
\$2,000,000

CAMPAIGN GOAL  
\$1,800,000

2024 CAMPAIGN TOTAL  
\$1,836,672





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**CHAMPIONING UNITED WAY**



# CHAMPIONING UNITED WAY

## YOUR ROLE AS AN EMPLOYEE CAMPAIGN MANAGER

- You are the key to a successful workplace campaign
- You enable your co-workers to create a stronger community
- You plan, organize, and coordinate a successful workplace giving campaign.



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# CHAMPIONING UNITED WAY

## STEPS TO A SUCCESSFUL WORKPLACE CAMPAIGN



1. Plan
2. Execute
3. Finalize



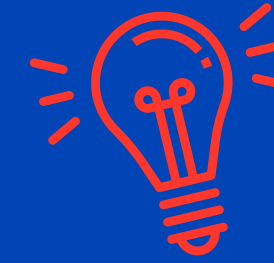


# CHAMPIONING UNITED WAY

## STEPS TO A SUCCESSFUL WORKPLACE CAMPAIGN

### 1 PLAN

- Fill out ECM survey
- Meet with your United Way account manager
- Review the Campaign Toolkit online



\*SEE THE CAMPAIGN CHECKLIST INCLUDED IN YOUR GUIDEBOOK

#### CAMPAIGN CHECKLIST

##### ✓ Plan your campaign

	Target Date
Review your online campaign toolkit.	
Meet with your United Way account manager to review last year's campaign, determine opportunities, navigate challenges and discuss strategies.	
Recruit a co-employee campaign manager or planning committee (optional).	
Set a goal, determine incentives for giving and brainstorm special events. Meet with your organization's leadership to get their personal endorsement.	
Send a note from your organization's leadership to all employees endorsing and announcing the upcoming campaign.	
Promote your campaign! Get your team excited about your fundraising goal and distribute your calendar of events. Use our email and social media templates for an easy start.	

##### ✓ Execute your campaign

	Target Date
Host a kickoff event. Invite your United Way account manager to present impact stories. Share why you support United Way. Consider inviting retirees to this event.	
Find a creative way to recognize your leadership donors (\$500+). You can request a list of leadership donors from your United Way account manager.	
Make sure every employee has the opportunity to give. Provide them all with a paper pledge form, a link to your online pledge form and/or communication to rollover their pledge from last year.	
Throughout your campaign, host special events. Lunch and learn, chili cookoffs and cornhole contests are fun activities. The United Way team is available to help with these and provide ideas.	
Throughout the campaign, share your progress and participation on social media! Tag us @uwozarks. Take advantage of your campaign toolkit to promote and communicate internally.	

##### ✓ Finalize your campaign

	Target Date
Collect pledges, submit final report envelopes/spreadsheets to your United Way account manager. Pledges and monetary contributions should be turned in before March 31, 2025.	
Review campaign results with your committee members and your United Way account manager. Announce results to all employees.	
Thank all donors with a celebration event and a letter/email from your organization's leadership.	



USE YOUR WORKPLACE CAMPAIGN TOOLKIT!



# CHAMPIONING UNITED WAY

## STEPS TO A SUCCESSFUL WORKPLACE CAMPAIGN

### 2 EXECUTE

- Host a kickoff event and invite United Way to do a presentation
- Don't forget about retirees!
- Communicate!





# CHAMPIONING UNITED WAY

## STEPS TO A SUCCESSFUL WORKPLACE CAMPAIGN

### 3 FINALIZE

- Collect all pledge forms and cash/checks and turn in to your account manager
- Announce results to all employees, award incentives
- Thank your employee donors!



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**CAMPAIGN RESOURCES**



# CAMPAIGN RESOURCES

## WORKPLACE CAMPAIGN TOOLKIT

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**PLEDGE FORM**  
EVERY GIFT COUNTS!

**211**  
Get Connected. Get Help.™


**ABOUT ME**

Please Print  
First Name \_\_\_\_\_ M.I. \_\_\_\_\_ Last Name \_\_\_\_\_ Gender: ☐ Male ☐ Female ☐ Non-Binary  
Home address \_\_\_\_\_ Birthday (month/year) \_\_\_\_\_  
City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_ ☐ I am retiring in (month/year) \_\_\_\_\_  
Personal Email \_\_\_\_\_ Cell Phone \_\_\_\_\_ and I want to continue to give. Please contact me.  
Employer \_\_\_\_\_ Employee I.D. \_\_\_\_\_ Are you a union member? ☐ Yes ☐ No

☐ I wish for my donation to remain anonymous. ☐ I wish to be recognized as a combined giver with:  
X \_\_\_\_\_ Date \_\_\_\_\_ Combined Giver First and Last Name \_\_\_\_\_ Employer \_\_\_\_\_


**MY CONTRIBUTION**

**EASY PAYROLL DEDUCTION**  
A. I wish to give. My pay period is:  
☐ Weekly (52) ☐ Every other week (26) ☐ Twice a month (24) ☐ Monthly (12)  
☐ One-time payroll deduction in the month of: \_\_\_\_\_  
B. My donation per pay period is:  
☐ \$50 ☐ \$25 ☐ \$10 ☐ \$5 ☐ Other \$ \_\_\_\_\_  
My Total Annual Gift: (A x B) \$ \_\_\_\_\_

**ONE-TIME GIFT**  
I wish to pay using:  
☐ Cash \$ \_\_\_\_\_  
☐ Credit Card  It's easy to donate with your debit or credit card. **SCAN** or visit [www.uwozarks.org/donate](http://www.uwozarks.org/donate)  
☐ Check \$ \_\_\_\_\_ Check # \_\_\_\_\_ Please make checks payable to United Way Ozarks Region.  
☐ Bill me Must provide home address above.

**I WANT TO MAKE AN IMPACT**

**COMMUNITY INVESTMENT FUND**  
Your general, or undesignated, donation to United Way is combined with donations from other individuals and companies to build our Community Investment Fund, which supports local programs in two focus areas: **championing children** and **providing pathways out of poverty**.  
Our Community Investment Fund supports carefully evaluated, well-defined programs that tackle problems in different ways.  
• **Upstream programs** address root causes of social issues to make long-term changes  
• **Safety net programs** deliver short-term solutions to meet immediate needs, often to families in crisis  
• **Innovative programs** introduce a new approach to known issues or address emerging challenges  
We can do more together than we can alone.  
Your donation supports United Way of the Ozarks Community Investment Fund unless otherwise specified.

**VIEW the 20 local programs and 15 local nonprofit partners currently supported by United Way of the Ozarks Community Investment Fund** 

**OPTIONAL DESIGNATED GIFT**  
Please direct my donation of \$ \_\_\_\_\_ (minimum \$50) to:  
☐ United Way Cancer Fund (local) ☐ United Way Veterans Fund (local) ☐ Other 501(c)(3) charity: \_\_\_\_\_

Your donation supports the United Way Ozarks Region Community Investment Fund unless otherwise specified. If your company permits rollover, your donation will rollover as gifts to the Community Investment Fund after one year. You must complete a new form each year if you wish to designate your gift to a specific United Way fund or other 501(c)(3) charity. Gifts may be stopped at any time upon request. United Way Ozarks Region does not provide goods or services in consideration for contributions by payroll deduction or direct gift. Please return the original copy of the pledge form to United Way Ozarks Region. Your organization is responsible for making copies for internal records.

**THANK YOU FOR YOUR SUPPORT**

320 N. JEFFERSON, SPRINGFIELD, MO 65806 | 417-863-7700 | [WWW.UWOZARKS.ORG](http://WWW.UWOZARKS.ORG) | @UWOZARKS

- Rollover Campaigns
- Pledge Forms



SCAN  
ME!





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**UPCOMING DATES**

**NEXT STEPS**

# COMMUNITY CAMPAIGN KICKOFF

MOTHER'S BREWING BARREL ROOM

TUESDAY, SEPTEMBER 9

4:00-6:30PM



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BUY NOW





# 2024 IMPACT AWARDS



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- **COMMUNITY CATALYST**
  - GOOD DADS
- **CORPORATE CHANGE-MAKER**
  - MERCY
- **HEART OF UNITED WAY**
  - JEN JOHNSON, SPRINGFIELD AREA CHAMBER OF COMMERCE
- **UNITED IN ACTION**
  - MERCY
- **REVITALIZATION**
  - LINDSEY DUMAS-BELL, OACAC
- **RISING STAR AWARD**
  - MARY LING, AMPROD
  - KATOYA EATON, AMPROD
- **MOST CREATIVE CAMPAIGN EVENT**
  - MANDY MROTEK, ARVEST BANK

# NEXT STEPS

- **FILL OUT THE ECM SURVEY IF YOU HAVEN'T ALREADY**
- **SCHEDULE TIME TO MEET WITH YOUR ACCOUNT MANAGER**



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**Get Connected. Get Help.™**



# THANK YOU!



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Ozarks Region



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