

DEVELOPING AND IMPLEMENTING A SUCCESSFUL EMPLOYEE GIVING  
CAMPAIGN: A CASE STUDY FROM SOUTHERN UTAH UNIVERSITY

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the Faculty of the Communication Department  
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In Partial Fulfillment  
of the Requirement for the Degree  
Master of Arts in Professional Communication

by  
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Dr. Stan Gwin, Project Supervisor

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**APPROVAL PAGE**


The undersigned, appointed by the dean of Humanities and Social Science, have examined the project entitled


**EMPLOYEE GIVING**


presented by Ron Cardon

a candidate for the degree of Master of Arts in Professional Communication,


and hereby certify that, in their opinion, it is worthy of acceptance.

  
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ABSTRACT

The 2008 Employee Giving Campaign at Southern Utah University (SUU) sought to increase the number of employees giving financially to the university as a means of leveraging larger donations from philanthropists, foundations, corporations and alumni. Three faculty and three staff members served as campaign chairs and as members of the steering committee for the campaign. Campus departments were divided into teams and 72 individuals served as captains of each team. Those individuals were trained and then contacted each member of his or her team and asked for their participation in the employee giving campaign. By the end of the campaign, the employee giving participation rate increased from 27% to 85% among benefits-eligible employees. New employee giving materials were designed, a new university artifact was introduced and a shift in the giving culture at SUU occurred as a result of the campaign.

## ACKNOWLEDGEMENTS

This project and its success would not have been possible without several individuals: Stuart Jones for making the employee giving campaign an important part of the larger campaign at SUU and allowing me flexibility in its design and implementation; Mindy Benson for her ideas, direction and advice; Lynne Brown, Matt Barton, Jim Harrison, Eric Houle, Clarisse Lunt and Linda Marriott for their dedicated leadership, support and service as campaign chairs; the 72 SUU employees who served as team captains and willingly approached their colleagues and asked them to support the campaign; and of course, the hundreds of SUU employees who gave of themselves for the betterment of Southern Utah University.

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This project examines the 2008 internal campaign at Southern Utah University (SUU) that targeted full-time employees with the goal of increasing employee donations to the university through payroll deductions. It explores the planning, research, conceptualization, timeline, volunteers, materials and kick-off of an employee giving campaign. In addition, the hurdles, successes and challenges of the campaign are discussed, as well as recommendations for future campaigns.

The project was supervised by the Vice President for Institutional Advancement at SUU with faculty and staff members being invited to serve on a steering committee by the president of the institution. Steering committee members helped carry out the campaign and recruited colleagues to facilitate the employee-to-employee, face-to-face asks. The goal was 60 to 70% participation among full-time employees. Final end participation rate was 85 percent.

## PLANNING

Michael T. Benson was hired as Southern Utah University's 15th president in November 2006. He announced during the selection process that if hired, he would launch an ambitious fundraising campaign of \$115 million by 2012 – the largest amount ever raised in a single campaign at SUU.

To assist in guiding and directing this campaign, President Benson lured SUU alumnus Stuart Jones back to campus to once again serve as Vice President for Institutional Advancement. Since alumni relations and development both comprise the department of institutional advancement, his hiring had a direct impact on me and my job responsibilities. My official title was, and still is, associate director of alumni relations.

However, my actual job activities at the time included not just alumni duties, but also those of directing the annual giving program.

The arrival of Vice President Jones to campus ushered in a new and increased focus on fundraising. For me that meant a more complete emphasis on the annual giving program and all that it entails. In the fall of 2007, he presented the idea of reinstituting SUU's employee giving program. It had unofficially existed for years, but no one was coordinating it at the time and a campus-wide push had not occurred since the mid 1990s. Jones explained that if President Benson's \$115 million campaign was to succeed the president needed broad campus support and that a strong employee giving program could accomplish that and raise additional money. The employee giving campaign became my responsibility and consequently my capstone project for a master's degree in professional communication.

Our employee giving campaign was seen by Institutional Advancement as an important piece in laying the foundation for the comprehensive campaign entitled "The Future is Rising." Vice President Jones felt strongly that this employee giving campaign had to surpass the most successful SUU campaign ever. The campaign in the 1990's achieved 80% participation. It was argued that if the university's largest comprehensive capital campaign was to be successful, proof needed to be given that campus employee were behind the president. A successful employee giving campaign would accomplish exactly that and provide leverage in securing important gifts from philanthropists, foundations, corporations and alumni (Schroeder, 2000).



## RESEARCH

My research began immediately in the fall of 2007, as I received the assignment of leading the campaign. I was hoping to find a “How-To Guide” that would walk me carefully and deliberately through the steps of an employee giving campaign. I had no such luck. Instead I found only broad philosophies and statements highlighting the importance of such campaigns. In a nutshell, I learned that faculty and staff are the core of an institution, that employees can have a profound impact on an annual giving program and that an employee giving program should be considered (Schroeder, 2000).

Wanting and needing more how-to information, I turned to my colleagues throughout the state of Utah. I was a member of the Wasatch Annual Giving Officers Network (WAGON), a group dedicated to the sharing of annual giving ideas. WAGON members included representatives from Utah State University, Weber State University, University of Utah, Brigham Young University, Utah Valley University, Dixie State College of Utah, Snow College, College of Eastern Utah, Brigham Young University-Idaho and Boise State University. I found the employee giving programs at Brigham Young University (BYU) and Utah Valley University (UVU) to be the strongest and consequently the directors of those programs became my greatest allies and I used them as models.

A WAGON meeting provided me an opportunity to visit with Darla Seamon at BYU and learn more about their university’s employee giving campaign. She provided clear-cut insight that the focus of an employee giving campaign should be on participation and allowing employees to direct their donation in any way they see fit. She made the point that employees want to be in control of their gift and not simply turn

money over to administrators to use how they see fit. Darla also provided me with confidence regarding the timing of our campaign. She pointed out that the only reason BYU does a fall campaign is that the United Way of Utah County does its campaign in the spring. The timing could have easily been reversed, but tradition put BYU's employee giving campaign in the fall and United Way in the spring. Darla reaffirmed what Vice President Jones emphasized; that peer-to-peer asks is the best and most productive technique in an employee giving campaign (Tromble 1998). She also shared samples of campaign materials which I used (with her permission) as a pattern for our materials (WAGON, 10-26-07).

From Christina Pianezzola at UVU, I learned that a little competition never hurt an employee giving campaign (C. Pianezzola, personal communication, February 19, 2008). At her institution, employees are divided into teams with one team per department and each team having the goal of 100% participation. Winning teams are rewarded with a luncheon hosted by the president. For her campus, face-time with the president is a hot commodity and is a powerful motivator to many employees. I found the competition idea attractive and believed it could be a strong motivator here. Christina also stressed the importance of confidentiality. She explained that it was not uncommon for administrators and department heads to approach her and ask who on their team is not participating. She guards that information and does not release it because of the potential for a nonparticipating employee to feel harassed, or to believe that his/her job is in jeopardy or to have his/her reputation tarnished. Tromble (1998) also emphasizes that employees should not be coerced into participating or feel guilty because they choose not to participate.

In December 2007, I attended a regional conference of Council for the Advancement and Support of Education (CASE) where I visited with colleagues from around the west. While I did not gain new ideas or discover a hidden “How-To Guide,” I did find that the ideas I had formulated were not off base or destined for failure. I learned that each institution is unique and that employee giving campaigns must be unique, taking into consideration the dynamics of each college or university. I came away from the conference with the validation to move forward with the campaign.

For local research, I relied on Harry Brown, a friend and former director of the foundation at Intermountain Health Care’s Valley View Medical Center (VVMC). As part of a very successful \$3 million cancer center fundraising campaign, the foundation challenged the employees of VVMC to join the Hour Club – a payroll deduction initiative where employees donated one hour’s worth of pay toward the construction of a radiation oncology center. I met with Harry (H. Brown, personal communication, February 11, 2008) to discuss SUU’s employee giving campaign. The most important piece of advice he gave was the concept of using the term “opportunity” when asking an employee to donate. From Harry’s experience, people, employees or not, appreciate the opportunity to be part of something great. He stressed the importance of presenting to SUU employees that they have the opportunity to be part of something great by supporting President Benson and directly participating in the university’s comprehensive capital campaign. I utilized that piece of advice and encouraged others involved with the campaign to do the same.

Harry Brown also advised me to make the case that legislative funding can be swayed by a campus boasting a high percentage of employees giving back to the

institution. Wes Curtis, SUU's legislative liaison, supplied that quote and helped to build that case.

Harry also recommended that SUU consider a donor recognition wall for the employee giving campaign. While definitely a good idea for the construction of a building, the donor wall presented problems for this campaign. In contrast to the VVMC cancer center campaign, ours would be ongoing with no definite ending such as the completion or dedication of a building. This is more of an open ended campaign with the goal of an employee donating throughout his/her tenure at SUU. The thought and expense of changing a wall each year to reflect the most accurate list of employee donors was unrealistic, both from a time and financial perspective.

#### INITIAL CONCEPTUALIZATION OF THE CAMPAIGN

During the initial conceptualization of the campaign, there were two possible approaches: focus on money or participation. Several of my colleagues at SUU wanted the campaign's focus to be on money and raising the largest amount possible. It was a logical argument. New donations and increased financial resources would help meet the ever growing need for scholarships as well as other pressing campus needs. But in visiting with colleagues, both at WAGON and at the CASE conference in Las Vegas, I repeatedly found that the majority of successful higher education employee giving campaigns focused on participation and not the amount raised. If a building was to be built, such as the VVMC cancer center, focusing on dollars raised would be appropriate as employees would have a tangible goal to monitor and see through to completion. But our employee giving campaign was different. We wanted an employee to commit to giving a portion of his/her income indefinitely or at least until the termination of his/her

employment at SUU. There would be no building to dedicate, no new program to launch and in most cases, no way of attributing a donation to a specific student. So participation – each employee donating something – became the focus.

Vice President Jones was adamant that the campaign have a grass-roots approach and be based on colleague-to-colleague asks. It was not uncommon at SUU for an employee to be asked to make a donation through a mass email or by a direct mail piece. Those types of asks are extremely passive and are easy for an individual to ignore and consequently decline. I even noticed at gatherings of the SUU Staff Association that payroll deduction asks would be made by placing five or six payroll deduction cards at a table of ten. An unmistakable and I assume unintended message of “we do not expect everyone to participate” was communicated. It led me to believe that employee giving was not an important component of the organizational structure at SUU. My goal was the opposite. I wanted everyone to participate in the campaign and for employee giving to become an important part of the organizational environment at SUU.

In an effort to make the campaign fun and exciting, I took a cue from Utah Valley University and planned to initiate a competition (WAGON, 10-26-07). Teams would be created. Each team would have the goal of achieving 100% participation, meaning every team member would donate something. Rewards would be an important part of the competition but they also needed to be conservative so as not to eat away at the end fundraising result and open the gates of criticism.

I wanted employee giving to become part of the organizational culture at SUU and be a value shared by a large majority of employees. I envisioned introducing a new artifact that would be widely visible and provide evidence of what I hoped would become

an organizational value of employee giving (Dainton & Zelley, 2005). The end result would then be a basic organizational assumption that employees at SUU donate financially to the University (Schockley-Zalabak, 2006). I also wanted an artifact to present to each team (and each office) that achieved 100% among its members. My original idea was a window cling that would be placed on an office door or window. Each year thereafter when 100 percent participation was reached by a team, a new cling would be placed alongside the previous year's cling.

I ran my idea past Joey DeGraaf, a graphic artist in the SUU Publications Office and to whom I was looking for design help; he opened my thinking to something bigger and more meaningful. He suggested a poster. He argued that a poster would be larger and more attractive than a window cling. Plus, not all offices have a visible location for a window cling. Joey envisioned a poster that would have the University's brand prominently displayed and become something each office valued and displayed proudly. To recognize the goal of 100% participation, boxes could be designed at the bottom of the poster where a sticker designating the year(s) of 100% participation would be placed. I was persuaded and became excited about the possibilities of the poster. Joey began the design work.

The finished product was fantastic. The poster was black, with a thin red border and a large "Thor" logo in the center. The wording on the poster was simple. It stated: "We Support Southern Utah University" and then asked the question, "Are You 100% SUU?" Included were eight gray boxes where stickers representing each year of achieving 100% participation would be placed (Appendix A).

Some questioned the subtlety of the poster's message and the fact that it did not blatantly proclaim "employee giving." However that was part of our goal. We wanted a conversation piece that would perk the curiosity of students, visitors and new employees. We wanted questions to be asked and conversations to take place about the meaning of the poster, the accomplishment of that department and the importance of employees giving financially to the University.

Another important goal of the poster is to provide a constant reminder to each department of what it has accomplished and to remind others of what could still be accomplished. In essence, I wanted the poster to become an organizational artifact that would communicate the values of the organization (Shockley-Zalabak, 2006).

Another reward I put in place was to provide lunch with President Benson to members of each 100% team. This incentive was popular at Utah Valley University since everyone there wanted face time with the president. I found that face time with our president was not as hot a commodity as it was at Utah Valley University, most likely because of SUU's smaller size. I discovered that most employees who wanted time with the president had opportunities to do so. Even though this incentive was promised and was intended to be fulfilled in the fall of 2008, it was postponed and eventually cancelled due to a sluggish economy and campus-wide budget cuts. Only one department asked about the luncheon and questions were easily answered once the situation was explained.

The SUU Bookstore was gracious and allowed me to create a coupon that gave each employee, whether participating in the campaign or not, a free 21-ounce soft drink at the C-Store. While certainly not a deal-maker, the coupon provided an incentive and

gave a benefit to each employee in exchange for his/her consideration of a donation (Appendix B).

Publicity was also a component of the campaign, particularly as teams reached 100% participation. Congratulatory emails were sent to the team captains of each 100% team and a separate email was sent to other captains announcing the success of their colleagues. The SUU Bulletin, a frequent email blast sent to all employees, served as the means of communicating the campaign's success to the campus community. At commencement, President Benson mentioned the campaign and applauded the efforts of faculty and staff for reaching a participation rate of 75 percent. He also noted that the campaign was not finished and that the participation rate would continue to climb. The fall 2008 edition of the *SUU In View* alumni magazine, mailed to roughly 30,000 individuals, also printed a very nice article publicizing the campaign and its results.

In January of 2008, I began the initial design of the campaign materials. I took my cue from Brigham Young University and their campaign materials, which I found to be professional and appealing. I saw my design efforts as the beginning of an employee giving campaign that would continue for several years and I wanted a look for the materials that could be used for several years, with only a few adjustments down the road. The look of the materials needed to communicate professionalism, legitimacy and longevity.

The payroll deduction form that was being used at the time was very stale, uninviting and lacked visual appeal. Since the human resource office fills a critical role in the initiation of all payroll deductions, I visited with the assistant director to learn what information on the current form was critical to the process. I then began adapting the



BYU payroll deduction form to reflect those things important to our campaign. The result was a new and improved employee giving payroll deduction card that also accommodated a one-time gift donation (Appendix C). Two envelopes were created. The first was a 6 ½ x 9 ½ envelope (Appendix D) that would be given to each employee containing a letter, the employee gift or donation card, the drink coupon and a 4 ¼ x 9 ½ security envelope (Appendix E) to be used by each employee to return their donation.

#### TIMELINE FOR IMPLEMENTATION

I officially began work on the campaign in November 2007, but the official announcement and launch did not take place until March 26, 2008 at 4:00 p.m. in the Randall L. Jones Theater during a campus forum. President Benson held these forums as a means of communicating to faculty and staff information on projects, goals and accomplishments. The timing of this forum on March 26 was especially good for three reasons: 1) we could capitalize on the excitement of Founders Day held on March 14, 2008; 2) school was back in session from spring break which meant that employees were back too; and 3) the legislative session had ended and employees were looking forward to an announcement of a pay increase.

The initial goal was to wrap up the campaign prior to graduation so that the recognition lunch with the President could be held prior to faculty leaving campus for the summer. However, the timeline was changed due to busy schedules of team captains and their colleagues, as well as a persistent push from administration to surpass the 80% participation mark. As a result, the campaign ended June 30, 2008, the very last day of fiscal year 2008.

## IDENTIFICATION OF COMMITTEE MEMBERS

This campaign was to be a grassroots effort emphasizing colleague to colleague asks. While team captains would be the vehicle for accomplishing that goal, I believed a strong steering committee was essential to the credibility and buy-in across campus. Plus, I needed assistance in planning and implementing the campaign. I decided to invite three faculty and three staff members to serve on the steering committee and to fill the roles of campaign chairs. I brainstormed names with my immediate supervisor and Alumni Relations Executive Director Mindy Benson, who was a 13-year veteran of SUU. She had an excellent feel for campus and knew which employees had a good reputation among their peers. Once we narrowed our list, names were passed to Vice President Stuart Jones for his approval and then to President Benson for his final approval.

## INVITATION TO COMMITTEE MEMBERS TO SERVE

The President extended the invitation to each individual to serve on the steering committee and be the chairs of the campaign. I wanted a strong commitment from each steering committee member and believed that a personal invitation from the president would establish that commitment (Tromble, 1998). Another reason for the presidential invitations was that President Benson is a very persuasive man and he would be difficult to turn down. In the end, each name submitted agreed to serve. A few did have concerns regarding how much time they would need to commitment to the campaign. But I was able to ease those concerns by emphasizing that I was the full-time staff member assigned to facilitate the campaign and I would be doing the majority of the leg work. Another concern surfaced in regards to giving back to the university when many employees work more than their 40 hours each week and even lose vacation time at the end of the year

because of the demanding nature of their job. The tactic of “it is not how much you give, but that you give something” worked with that particular steering committee member and provided me with optimism that the overall campaign could succeed.

#### MEETING WITH COMMITTEE MEMBERS

Our first of six steering committee meetings was held on February 19, 2008 (Appendices F). We discussed the president’s comprehensive capital campaign, the goal of raising \$115 million (the most ever raised at SUU in a single campaign) and that all areas of campus would benefit from the campaign -- not just select departments or programs. We discussed the importance of employee giving to the larger campaign and how our success would serve as a barometer for others in gauging campus sentiment towards the president and his goals. The steering committee also came to a consensus that the employee giving campaign would stress participation and not dollar amount and that asking a colleague face-to-face by a team captain would be the emphasis.

#### DISCUSSION OF CAMPAIGN MATERIALS

The first thing the steering committee began work on was a case for support. Any legitimate and thorough fundraising effort has such a statement and is described as the “...logical compelling rationale for the campaign” (Tromble, 1998, p.23). We wrote two versions that were nearly identical. Version one referenced the dollar amount of the comprehensive capital campaign and version two used a more generic reference to the campaign. Both versions were forwarded to Vice President Jones and he selected number two, reasoning that the comprehensive capital campaign was still in the early formation stage and it was premature to discuss the final dollar amount of the campaign (Appendices G). Our case for support stated: “With Southern Utah University launching

a comprehensive capital campaign, participation from SUU's own employees is crucial. Employee giving demonstrates your commitment to the future of SUU and provides valuable leverage in reaching our campaign goals.”

The second item of business was the drafting of a campaign letter. It was my opinion that the letter needed to come from the committee and not from the alumni relations or development offices. It was my belief that a letter from the steering committee would convey the message that employees were truly leading the campaign and that the campaign was important to employees and not just to members of the development office whose job it is to raise money. We also wanted the letter to provide motivation, calm concerns, explain the importance of the campaign and then ask for a donation.

After some lengthy discussion as to the message and tone of the letter, it became my job to make the first attempt at drafting the letter (Appendices H). I found sample letters from Eastern Michigan University, University of Connecticut, Western Maryland College and Carnegie Mellon University that I liked and I used bits and pieces from each (Appendices I-L). The committee reviewed my first draft and while complimentary, agreed that more improvements were needed. Dr. James Harrison offered to revise the draft and in the end, provided a much more compelling and passionate letter (Appendices M).

The steering committee was very supportive of my early work in the design of the campaign packet and materials that would be given to each employee. The group discussed the materials, provided feedback and minor adjustments were made.

The committee also felt it was important to prepare a document that would help team captains answer questions that would most likely be posed to them by their colleagues (Appendices N). It was not our intention to script answers but rather to prepare captains for what was to come. The following questions were addressed: Where will my donation go? Why doesn't the state of Utah provide all of SUU's funding needs? How does *The Future is Rising* campaign benefit me? How can I make a financial contribution to SUU when I don't get paid enough? How can I donate when we have not had many pay raises and I make below industry standard? I donate enough time and energy to SUU, why should I donate money too?

The Steering Committee also provided captains with quotes from key administrators in an effort to build the case for employee support. We believed that such statements would be helpful in persuading their team members to donate and in answering their questions. Assistant to the President and SUU Legislative Liaison Wes Curtis said the following:

"The legislature always looks at the level of private and other funding before committing state funds. The higher the level, the more likely the legislature is to commit state funds. This is true for almost all state appropriates – from programs to student support to buildings. The more we can raise institutionally, the higher the likelihood of getting more state funds."

Stuart Jones, Vice President for Institutional Advancement and the one whose office is tasked with fundraising provided the following quote:

“Employee giving is essential to the success of our comprehensive campaign. We gain important leverage in securing gifts if we can demonstrate to donors that SUU’s own employees are doing what they can financially to advance the institution.”

#### TEAM CAPTAINS

In preparation for the steering committee meeting, I sorted through an employee list (supplied by human resources) and divided the list into teams. In the majority of cases, teams were divided along department lines. However, there were instances when a department only comprised two employees. After consulting with Christina Pianezzola at Utah Valley University (2-19-08 telephone call) I decided to combine a few departments in an effort to even out team numbers and equalize the feat of achieving 100% team participation.

The steering committee was then responsible for identifying an employee from each team best suited to serve as the team captain. The diversity and size of the steering committee paid off as valuable insight and understanding was gleaned. In considering a team captain, the steering committee looked at time, reputation, past experiences and if a particular individual would be willing to accept such an assignment. Once team captains were finalized, 72 in all, the steering committee divided up the names and set out to personally extend the invitations. I prepared a document with talking points that members of the steering committee could reference as they invited team captains to serve (Appendices O). Team captains were informed that a volunteer training would occur where they would be provided with instructions and information on how to complete their tasks.

## CAMPAIGN KICK-OFF

As mentioned earlier, President Benson was developing a routine of holding campus forums as a means of communicating to SUU employees. These forums were well attended since employees could learn about campus happenings and have their questions and concerns addressed directly by the President. The actions of the 2008 Legislature and the percentage of salary increase for employees was of particular interest at the 4:00 p.m. forum of March 26, 2008. I concluded, and the steering committee endorsed the idea, that this Campus Forum would be the most appropriate place to officially announce the campaign and have President Benson publicly endorse it. We believed that if we were to hold an independent kick-off for the employee giving campaign that attendance would be dismal at best.

It was my responsibility to take roughly five minutes during the forum and present the campaign with energy and enthusiasm, make the case as to why it was important, highlight the competition portion and let the employees know that they would be approached by a colleague who would ask for their participation. My presentation went well and feedback was excellent. The president publicly endorsed our effort and it was absolutely the right place to begin the campaign.

We scheduled two different team captain trainings on March 27 and March 28, 2008 in the new Eccles Education Building. This building was chosen because it was new and perhaps the allure of seeing the building from the inside would motivate team captains to attend. Captains picked one of two trainings to attend and Vice President

Jones and I explained the mechanics of the campaign, provided instruction on how to ask for a donation, distributed campaign materials (steering committee members helped with this) and then offered motivational instructions and advice on how to get their colleagues to participate. Appendices P provides talking points given to Vice President Jones to guide his portion of the trainings. We served light refreshments which included: dollar sandwiches, a vegetable tray, cookies and lemon water.

### FOLLOW THROUGH

The steering committee knew that for the campaign to be successful, we would need to follow up with team captains to make sure each was fulfilling his/her assignment and to offer assistance. Each steering committee member was assigned team captains based on who had extended the invitation to a captain to serve. Because I was the full-time staff member assigned to the campaign, I not only followed up with my own team captains but I assisted other committee members with their follow ups. Numerous emails, phone calls and personal visits occurred.

With the help of McKenzie Hyde, the university's gift processor, we developed a color coded tracking system using Microsoft Excel. Teams were placed in boxes and each member was highlighted in a different color based on the type of donation made -- whether it was a payroll deduction or a one-time cash gift. Names not highlighted had not made a gift during the current fiscal year. The spread sheet tracking system was not complex but it allowed me to provide captains with regular updates on their team's progress. In other words, I could report to each captain the percentage of their team's participation and the number of employees who were not donating. I found the processing of gifts to be extremely satisfying. It became an obsession of mine to watch



the participation levels grow and I was extremely gratified to see colleagues going above and beyond my own expectations in their level of participation. I did significant follow through with my own team reminding them to complete their donation cards and turn them in, which was quite surprising since they are the full time fundraisers on campus. With hectic schedules and multiple projects, I found that constant reminders were needed in staff meetings and through email communication.

As mentioned earlier, the SUU Bulletin was used for recognition, but it was also a great follow up tool. Whenever a team reached 100% participation, its name and accomplishment was recognized in the Bulletin and became part of an ongoing list. That list turned out to be a tool for motivating and reminding others to push their team. While the Bulletin was not read by every employee, it was read enough that adequate team recognition was provided. I also made it a point to send a congratulatory email to each team captain thanking that individual for his or her dedicated service.

#### HURDLES ALONG THE WAY

The state of Utah created a collegiate license plate program that increased scholarship dollars at the colleges and universities around the state. It was and still is a simple and effective program: license plates owners donate \$25 at the time of their license plate purchase and the state sends checks earmarked for scholarship to each institution. President Benson was and continues to be a huge proponent of this program. He sees it not only as a boost to scholarship dollars but also as a tool to market SUU up and down the I-15 corridor and beyond. He instituted a new policy that allowed free parking anywhere on campus for both students and employees whose cars sport an SUU plate. The number of SUU plates grew and continues to grow. Our hurdle was that the

state of Utah, due to privacy rules, does not release to colleges or universities the names of individuals who have purchased plates. This made it impossible to give employees and their team credit for a donation made through the license program. The steering committee could do nothing to discourage the momentum of the collegiate license plate program and we hoped that employees who had plates would make an additional donation. But the steering committee also knew that some would want their license plate purchase to be counted as a gift toward the employee giving campaign. It was decided that for a plate to be counted, employees would write on their gift card “license plate” and return it along with a copy of their registration receipt to verify the purchase. However that approach created concern as employees either did not have their receipt or did not want to submit a copy of the receipt because the receipt may contain personal information. We abandoned the requirement of submitting a copy of the receipt and went with an honor approach, asking employees to simply sign their gift card stating that they owned a license plate. We believed that the overwhelming majority of employees would be honest and saw the concession as worth it so as not to derail the president’s initiative.

Another hurdle was our computer database – Banner. While the University as a whole had been using Banner for several years, Institutional Advancement was relatively new to the system and wrinkles were still being ironed out. As gift cards came in, we found many faculty members indicated they were donating to the Faculty Senate Scholarship. However there was no record of those donations in Banner. They had been inaccurately recorded because of a lack of information and understanding. It was assumed that money paid was actually a dues payment for membership in the faculty senate organization. Once the problem was discovered, I visited with Denise Woodbury,

a faculty senate officer, on April 22, 2008, and learned that in fact they were legitimate donations and not dues. That meant for years, faculty senate donations were being processed incorrectly. Each donation was safe and used appropriately but never officially counted by the university as a donation nor was a faculty member given proper credit. With the help of McKenzie Hyde, we corrected the issue and faculty senate donations are now being processed correctly.

### SUCCESES

At one of our first steering committee meetings, someone asked what would be a respectable participation goal for our campaign. Considering where we were at the time, 27%, and participation levels at other schools in Utah (which I was asked by those schools not to release) I felt somewhere between 60 and 70 percent would be acceptable. In the end, we achieved an 85% participation rate among our benefits-eligible employees. That is a fantastic and enviable percentage anywhere in the country. Reaching 85% participation established a solid foundation for the comprehensive capital campaign and clearly communicated that employees are supportive of President Benson and SUU.

A second success was in the shift of SUU's organizational culture. I believe that there is a renewed value of giving among SUU employees that can be built upon with future campaigns. Sure, several employees had been donating already, but just not in the numbers that this campaign produced (174 compared to 552) I also believe that this renewed value of giving will impact future organizational members. As new employees see the 100% participation posters and hear of the 85% participation rate, our chances have improved that they too will give back financially to the university (Shockley-Zalabak, 2006).

We also increased our chances of having SUU employees do more in the future. A typically tough audience was persuaded to donate to the university (Schroeder, 2000). According to commitment-consistency theory, by persuading employees to complete the simple task of participating in the campaign - at any level they chose - now brings the social psychology technique of „foot-in-the-door“ into play. In other words, chances have improved that SUU’s own employees will continue their behavior of donating and even increase the size of their donation in the future (Vaidyanathan & Aggarwal, 2005).

For me personally, the campaign provided a wonderful opportunity to integrate myself more on campus, become better acquainted with my colleagues and feel a tremendous sense of accomplishment. The results of this campaign will always be a personal career highlight for me and a reference point for tackling ambiguous and daunting tasks.

## CHALLENGES

There were challenges to overcome with the employee giving campaign. One such challenge was confidentiality. On the advice of my colleagues from WAGON, I tried to maintain a high level of confidentiality. I did not want employees to feel their jobs or reputations were in jeopardy if they chose not to participate, especially since everyone deals with a variety of financial issues at home. I tried my best not to reveal names of individuals who chose not to donate so as to minimize the pressure applied by supervisors and colleagues (Tromble, 1998). However, that became difficult as team captains and even supervisors would regularly ask for names of those not participating. It was nearly impossible to not share some type of information with these individuals. When this type situation presented itself, I gave those inquiring the names of employees

who were not coded as having made a gift, explaining that the employee either said no or had not returned a gift card and we did not know which it was.

Another challenge was employee turnover. It was difficult to maintain a current and accurate list of employees for each team. To the credit of the captains, each took the challenge in stride and worked with the “benefits-eligible” employees in their departments whether they were on the original team roster or not.

Time was also a challenge. Employees on a university campus, particularly faculty members, are busy at the end of a semester. Since the campaign was an “extra” that each captain agreed to take on, I understood the difficulty of fulfilling assignments quickly. Combine that with the busy schedules of peers and it was a definite challenge to find the time for the initial contact and/or the follow-up with each team member. Whether or not another time of semester could have been better is debatable. With more than 600 “benefits-eligible” employees on campus during the campaign, it would have been impossible to identify a time that would have been ideal for everyone.

Another challenge during the campaign was the lack of a solid ending date. This was not because of a lack of effort or planning. It was due to administration wanting to give the campaign a little bit more time so we could surpass the 80% mark, and to administration’s credit the extra time did pay off. While most faculty members were gone for the summer, staff members were still on campus and responding to the campaign. In hind site, ending the campaign in June was positive for a couple of reasons: first, the extra time allowed us to reach 85% participation; and second, the end of June was a natural ending to the campaign as SUU’s fiscal year ended June 30.

One surprising challenge I found was the argumentative attitudes of a few employees. I emphasize a few because I did not find these negative attitudes to be wide spread. Reasoning and explanation did little to soothe the emotions of such individuals and in fact, it seemed to feed their ill feelings. Their argument was that they had given time, energy and effort to their employer with what they perceived as little or no appreciation or recognition. When asked to give financially it seemed to be the straw that broke the camel's back. They believed working beyond 40 hours a week, having to perform multiple jobs because of a lack of staff members and below average pay was a sufficient donation back to SUU. But such a "gift" does not fund a scholarship, cannot be counted by the University as donation and certainly does nothing to elicit gifts from philanthropists, foundations or alumni.

#### WHAT I LEARNED

I learned eight lessons during this project; chief among those was the importance of an ongoing employee giving program to the foundation of a comprehensive capital campaign. I believe a university compromises itself in securing private funding when its own employees refuse to support the very institution that provides them with a paycheck. That indifference reveals the morale of a campus and signals a lack of desire by employees to improve their own situation. I firmly believe that our 85% participation rate communicated that morale at SUU is good, that the employees are behind the president and that they are excited for the future.

Second, participation, not dollar amount, is a more palatable sale on a university campus. Employees seemed to expect that we would be asking for a gift that would stretch their resources. But when they learned we were asking for their participation, at

whatever level they could give, there was a sense of relief and a feeling that they truly could do something and be part of the comprehensive capital campaign.

Third, employee control of a donation is important. If employees are to be persuaded to donate from their own pockets, they want to support a department or program for which they are passionate – whether it is their own department or another. They want to pick the designation of their donation and have assurance that their gift will not disappear into a black hole. I believe the approach of this campaign eased the majority of those concerns among SUU employees.

Fourth, people just need to be asked. It occurred to me during this campaign that it is far too easy to assume that employees are not donating because they have chosen not to do so or because they are disgruntled. While that is undoubtedly the case with some, I believe this campaign revealed that the vast majority were not donating because they had never been asked. It is amazing to me what employees and people in general will do when personally asked.

Fifth, a successful employee giving campaign can occur in the spring. I approached this campaign with some trepidation because of the timing of the campaign. It seemed as though many universities typically conduct employee giving campaigns in the fall and not the spring. I had no choice but to conduct our campaign in the spring given the date that I received the assignment. Since our late spring/early summer campaign was a success, it is easy for me to conclude that a strong employee giving campaign has more to do with how it is administered than when it is administered. Certainly the timing of a campaign is a major consideration, but it should be based on what is best for the institution and not because of a perceived industry standard. During

this particular year at Southern Utah University our spring employee campaign capitalized on the momentum of a successful inauguration of our new president, a much anticipated Founders Day celebration and a legislative session that yielded a modest pay increase. Those events were unique to our campus and certainly helped the campaign.

Sixth, confidentiality is difficult to maintain during an employee giving campaign. The overwhelming majority of team captains took their assignments seriously. They saw the goal of 100% participation as realistic and wanted to encourage their colleagues to donate. Supervisors, department chairs and even vice presidents were interested in knowing who they needed to visit with to reach the 100% goal. With those types of inquiries being made on a regular basis, it was difficult not to share donation information. I learned that a solid plan needs to be in place to address such requests, as well as how to maintain confidentiality that does not damage an employee's standing in his or her department while still moving the campaign forward.

Seventh, image is a motivator. Several team captains and their departments worked diligently to achieve the label of a 100% participation team. For some, the image of achieving anything less than 100% was not an option. Those departments believed they needed to set an example and reasoned that if anyone should achieve 100% participation it should be them. I was amazed to hear that a few department heads questioned my approach for recognition and viewed as slightly unfair. One individual asked, "Why not recognize and reward all individuals who donated?" This individual knew that his/her department was one in which 100% participation was a steep order and highly unlikely. The idea that his/her department would not achieve 100% participation was a little deflating. It was also interesting to watch others do what they could to



manipulate the system in their favor and elevate themselves, their office and department. There is no easy remedy for such complaints or activities except for a personal commitment to the established program, sound reasoning and back-up support from supervisors.

Finally, the energy of campus celebrations compliments an employee giving campaign. The October 2007 inauguration of President Benson was extremely successful and created a campus buzz that carried over well into the spring. I believe the inauguration boosted employee morale and optimism for the future. Add to that a founder's celebration that featured the dedication of a new education building, a carillon and the renovation of SUU's first building and there was plenty of excitement to fuel the fire of support among employees. While internal campaigns cannot wait for a presidential inauguration or a building dedication to come along, they can capitalize on what already exists. Campus gatherings, events, celebrations or activities are excellent resources for launching and sustaining employee giving campaigns.

#### WHAT I WOULD HAVE DONE DIFFERENTLY

I came away from the 2008 Employee Giving Campaign extremely satisfied with the results, despite my lack of fundraising experience. Nevertheless, there are elements of the campaign that I would have done differently.

First, improve the communication process with the university president. Early on, all campaign design elements were approved through the proper channels: first by an immediate supervisor and then by my vice president. I followed that same process throughout the campaign to report on successes and challenges. But I would occasionally hear that the president was inquiring about the campaign and its progress. I did

communicate regularly with my immediate supervisor and vice president, knowing that those same updates would be passed to the President -- and I believe they were. But had I communicated directly with the president I could have answered questions, provided more detailed information and simply given him a direct line to the campaign. Personal updates would have also been a nice courtesy to him since he extended the personal invitations to the steering committee and provided me with the platform to launch the campaign.

Second, introduce the campaign to the president's council and dean's council prior to the kick-off. Again, this would have been a nice courtesy to the most influential groups on campus. Members of both councils could then have returned to their respective areas and promoted the campaign and its importance among their employees. I might have also gleaned additional information from both bodies that would have added a previously unthought-of dimension to the campaign. If nothing else, both councils would have been well informed about the campaign, its structure, goals and methods prior to the campaign kick-off.

Third, solidify all team captains prior to the beginning of the campaign. Not all invitations from the steering committee had been extended to employees to serve as a team captain, primarily due to busy schedules and difficulty in personally reaching individuals. In some cases, employees had been contacted and either needed time to think about the invitation or simply said no because they were either too busy or had no interest. The number of team captains not solidified prior to the beginning of the campaign was small. But nevertheless there were still holes which meant extra leg work for me since I filled the remaining spots and provided one-on-one training that was

offered during the team captain trainings. I also believe that these team captains missed out on the energy of the team captain trainings and the expert instruction provided by Vice President Jones.

Fourth, develop a donation tracking system for team captains to ensure better confidentiality. This was the error that I regret most. I instructed captains to ask all members of their team to return a sealed gift envelope whether donating or not. By so doing, I hoped to eliminate the uncomfortable issue of one colleague telling another colleague that he or she would not be donating. But I was unprepared for subsequent questions regarding which employees returned their donation cards and which had not. I made the wrong assumption that when a team captain collected a donation envelope (whether it contained a gift or not) that the captain would cross that individual off his or her list. Some did, but since I did not address that issue in the team captain trainings, most did not even think about tracking names until it was too late. Consequently, it was difficult to maintain the confidentiality for which I had hoped. I found myself sharing the names of the individuals for whom we had no gift recorded, telling captains that either the employee had not returned an envelope or had refused to donate. There are multiple ways that such information could have been effectively tracked and so I leave that detail to the reader.

Fifth, conduct communication flow surveys at the conclusion of the campaign. It would have been interesting to have learned how the campaign was actually presented to employees and how well it matched with information provided to the team captains. Plus, as social judgment theory suggests, such a survey would have revealed how the campaign and its messages were perceived and then evaluated by employees. By

knowing whether campaign messages fell into the latitudes of acceptance, noncommitment and rejection, stronger and more persuasive messages could have been developed for the following year (Smith, Charles, Martell, Allen & Hembroff, 2006).

Sixth, provide better recognition of campaign results. In hind sight, recognition is one area in which I should have done more. 100% teams were highlighted in the SUU Bulletin and thank you emails were sent to the respective captains. The alumni magazine recognized the campaign results and I personally sent receipts and thank you letters to all cash donors regardless of whether the team reached 100% or not. But something as simple as a campus-wide email from the President would have been effective in closing out the campaign, announcing the results and thanking everyone for their participation. Given the cancellation of the luncheon with the President for 100% teams where much of the recognition would have been made, a letter or note from him to each team would have been effective. I also should have followed-up to assure that thank you letters and receipts were sent to those who participated by payroll deduction. As it was left, I assumed those letters were sent. It is important to note that my job assignment changed prior to the official completion of the campaign. Had that change not occurred or had I not been immersed in time sensitive assignments with my new position, I believe I would have done a better job of implementing recognition activities and properly ending the campaign.

## CONCLUSION

The 2008 Employee Giving Program at Southern Utah University was a tremendous success. Eighty-five percent participation among full-time employees is an enviable rate at any institution or organization. Equally important to the participation rate

is the shift in culture at SUU through the laying of a strong foundation for future employee giving campaigns. It was rewarding to witness the reintroduction of a program (for some it was brand new concept and program) and the overwhelming positive response by a majority of employees. Now, it appears SUU employees expect to see and are willing to support such an endeavor each year. In fact, the following year's employee giving push surpassed the 2008 results and reached 89% participation. While there are numerous methods for designing and implementing a successful employee giving campaign, this project and its subsequent documentation is meant to be a reference or starting point for others.

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APPENDIX A

ARE YOU 100% SUU POSTER



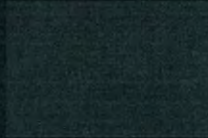
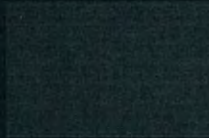
**WE SUPPORT SOUTHERN UTAH UNIVERSITY**  
*ARE YOU 100% SUU?*

Office of the  
President  
**2008**

Office of the  
President  
**2009**

Office of the  
President  
**2010**

Office of the  
President  
**2011**





APPENDIX B  
DRINK COUPON



## Have A Soda On Us!

Good for one 21oz soda fountain drink  
at the Sharwan Smith Center C-Store  
(across from the Bookstore)  
Offer Good Through May 15, 2008

*Thank You for Participating!*

SUU Employee Giving Campaign 08

## Have A Soda On Us!

Good for one 21oz soda fountain drink  
at the Sharwan Smith Center C-Store  
(across from the Bookstore)  
Offer Good Through May 15, 2008

*Thank You for Participating!*

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(across from the Bookstore)  
Offer Good Through May 15, 2008

*Thank You for Participating!*

SUU Employee Giving Campaign 08

APPENDIX C

EMPLOYEE GIVING PAYROLL DEDUCTION CARD

NAME: \_\_\_\_\_

DEPARTMENT: \_\_\_\_\_

T#: \_\_\_\_\_

With Southern Utah University launching a comprehensive capital campaign, participation from SUU's own employees is crucial. Employee Giving demonstrates to donors our commitment to the future of SUU and provides valuable leverage in reaching our campaign goals.

**I WISH TO:**

- ☐ START a payroll deduction of \$ \_\_\_\_\_ /pay period
- ☐ ADJUST my current deduction to \$ \_\_\_\_\_ /pay period
- ☐ MAKE a onetime gift \$ \_\_\_\_\_  
(make check payable to SUU)

**PLEASE DIRECT MY GIFT TO:**

- ☐ General Scholarship Fund
- ☐ SUU Annual Fund
- ☐ Other \_\_\_\_\_ \$ \_\_\_\_\_ /pay period  
(Designation)
- \_\_\_\_\_ \$ \_\_\_\_\_ /pay period  
(Designation)
- \_\_\_\_\_ \$ \_\_\_\_\_ /pay period  
(Designation)

SIGNATURE \_\_\_\_\_

DATE \_\_\_\_\_

Thank you for your participation

**SUU** SOUTHERN  
UTAH  
UNIVERSITY

LEARNING LIVES FOREVER

The  
Future  
is Rising!

EMPLOYEE  
GIVING  
CAMPAIGN

WWW.SUU.EDU/GIVING

APPENDIX D

6 ½ X 9 ½ ENVELOPE



EMPLOYEE  
GIVING  
CAMPAIGN

The  
Future  
is Rising!

APPENDIX E

4 ¼ X 9 ½ SECURITY ENVELOPE



EMPLOYEE  
GIVING  
CAMPAIGN

|

SU<sup>T</sup> ANNUAL  
FUND

SOUTHERN UTAH UNIVERSITY

## APPENDIX F

### STEERING COMMITTEE MEETING AGENDAS

SUU Employee Campaign  
February 19, 2008  
AGENDA

1. Welcome
2. Overview of Campaign
  - a. Purpose
  - b. Goal
  - c. Structure
  - d. Incentives and Rewards
  - e. Timeline
3. Case (Statement of Purpose)
4. Letter to Employees
5. Employee List
6. Identify and Address Possible Concerns
7. Next Meeting

SUU Employee Campaign  
February 26, 2008  
AGENDA

1. Welcome
2. Documents
  - a. Case (Statement of Purpose)
  - b. Letter to Employees
  - c. Large Campaign Objectives
  - d. Employee Giving Materials
3. Review Employee List, Teams and Begin Identifying Captains
  - a. yellow highlight is a payroll deduction during FY 08
  - b. orange highlight is a one-time donation during FY 08
4. Kick-Off Event, Monday, March 24, at 4:00 p.m. in the Starlight Room
5. Employee Concerns
6. Next Meeting: Tuesday, March 4, at 9:00 a.m.

SUU Employee Campaign  
March 4, 2008  
AGENDA

1. Welcome
2. Review Letter and 10 Questions/Answers
3. Review Employee List, Teams and Identify Captains
4. Captain/Volunteer Training
5. Kick-Off Event will be moved -- Monday, March 24, is a holiday.
  - a. Any thoughts as to what you'd like to see at the Kick-Off?
6. Next Meeting: Tuesday, March 11, at 9:00 a.m.

SUU Employee Campaign  
March 11, 2008  
AGENDA

1. Welcome
2. Review Team Captain List
  - a. Confidentiality
3. Review Letter and 10 Questions/Answers
4. Kick-Off Event/Campus Forum -- Wednesday, March 26 in the SSC theater
  - a. Agenda
5. Captain/Volunteer Training -- Set Date(s)
  - a. March 25 and/or 26 at noon?
6. Next Meeting: Tuesday, March 18, at 9:00 a.m?
  - a. Will anyone be here next week?

SUU Employee Campaign  
March 25, 2008  
AGENDA

1. Welcome
2. Letter
3. Review Team Captain List
4. 10 Questions/Answers
5. Kick-Off Event/Campus Forum -- Wednesday, March 26 in the Randall Jones Theatre
6. Team Captain Training
  - a. March 27 & 28 at 2:00 p.m. in Emma Eccles Jones Education Building Room 203
7. Next Meeting?
  - a. April 1, 8, 15, 22, 29

APPENDIX G  
CASE FOR SUPPORT STATEMENT



### Case for Support Statement

With Southern Utah University launching a comprehensive capital campaign, participation from SUU's own employees is crucial. Employee Giving demonstrates to donors our commitment to the future of SUU and provides valuable leverage in reaching our campaign goals.

## APPENDIX H

### SUU EMPLOYEE GIVING LETTER – FIRST DRAFT

March 4, 2008

Dear :

Thank you for your work and dedication to Southern Utah University. Your generous gifts of time and talent help make our institution strong.

Institutional strength and development is important to all of us. In order to remain competitive, SUU must prosper and grow and continue to carve out its niche of providing a personalized education in a public setting.

As President Benson and others work to meet the ever increasing needs of our institution, it is necessary that we stand alongside them and do what we can to help in the cause. To that end, we invite you to participate in SUU's Employee Giving Campaign. We ask that you initiate a payroll deduction, increasing an existing deduction, or make a gift with a personal check or credit card. We stress that participation, not gift size, is important when it comes to employee giving at SUU.

Your contribution, along with that of your colleagues, will communicate a powerful message to corporations and foundations, philanthropists and government leaders, as well alumni and friends that SUU is worthy of their financial support. The aggregate impact of employee giving will be equally impressive. If every full-time employee were to donate \$1 per pay period, more than \$16,000 would be raised annually; \$2.50/pay period would result in more than \$40,000; \$5/pay period would total more than \$81,000; and \$10/pay period would add more than \$163,000 annually to the University.

We invite you to complete the enclosed gift contribution card and designate your gift to the general scholarship fund, the annual fund or to a program, department, college or scholarship of your choosing. For a detailed listing of named scholarships, please contact Ron at x7776. Remember that participation, not dollar amount, is important.

It is a new day at Southern Utah University and we invite you to join the effort.

Sincerely,

APPENDIX I

EASTERN MICHIGAN UNIVERSITY EMPLOYEE GIVING LETTER SAMPLE

Date

Dear EMU Faculty and Staff:

As an employee of Eastern Michigan University, your connection with the students and our mission is extremely important. On behalf of the entire University, we would like to thank you for your hard work and dedication to EMU. Your generous gifts of time and talent to the University are what help to keep our institution strong.

November 11<sup>th</sup> marks the kick-off of this year's Faculty and Staff Campaign. Our highest priority this year is scholarship funding through expendable and endowed scholarships. Last year the campaign came on the heels of the events of September 11<sup>th</sup>. Despite this national tragedy, the EMU Faculty and Staff responded by exceeding the campaign goal of \$302,000 and raising over \$350,000. We just want to say thanks to all of you who helped.

The theme, "Creating Opportunities, Ensuring Success" reflects what faculty and staff do on a daily basis working for an educational institution. With your help we would like to continue to create opportunities for our students through scholarships, ensuring their success at EMU. The goal for this year's campaign is \$375,000 and we hope you will be a part of attaining this goal.

Enclosed please find a brochure about the Faculty and Staff Campaign. We invite you to become an active part of this campaign by making your gift today. Each gift will truly make a difference.

Sincerely,

Chairs of the Faculty Staff Campaign

APPENDIX J

UNIVERSITY OF CONNECTICUT EMPLOYEE GIVING LETTER SAMPLE

March 2002

NAME  
ADDRESS  
ADDRESS

Dear <<Name>>:

Last year we wrote to you as co-chairs of the 2001 Faculty and Staff Appeal, asking you to consider the University of Connecticut's future during this time of great transformation. When we were asked to co-chair the 2002 appeal, we were thrilled. This is another special year for UConn, and another opportunity for us to reflect on the importance of higher education and our great university – and the possibilities that lie ahead. We have stepped into a new century, and this is the perfect time for us to take a good look at where we are now and where we are going. Your past gifts have helped UConn acquire the resources necessary to endure as a world-class university. We hope that this year you will continue to provide UConn with essential financial support.

As we embark on a new era, the future stretches ahead of us, full of opportunity and promise. Because of the uniqueness of the remarkable time in which we are living, many of us of late have participated in more than our usual introspection. This is the time for each of us to decide how we will influence the coming years and to choose the part we will play in that endeavor.

It is important that UConn continues to prosper and grow, continuing to provide the priceless education, research and outreach that the world has come to know and expect. As others in our own offices are asked to make a pledge, it is crucial that we lead the way. Giving is a personal decision, so we asked that you to make a decision with which you are comfortable, a gift that makes you proud.

You are an essential member of this university community. Your past and future gifts are an affirmation of that reality, and of your belief in the value of higher education. We hope you will make a gift this year that supports UConn. The size of your gift is not important; it is the gift itself that matters. The gifts we make together will make a difference.

Sincerely,

Associate Director

Professor

P.S. For ease in making your gift, consider payroll deduction. Small monthly amounts add up quickly and will be directed where you wish! See the enclosed list of frequently asked questions for more details.

APPENDIX K

WESTERN MARYLAND EMPLOYEE GIVING LETTER SAMPLE





September 25, 2005

Dear «Salutation»,

This is an exciting time for Western Maryland College. As the College embarks on a new initiative and changes its name, it is more apparent than ever that it is the people of Western Maryland College who make the Hill a special place.

Each year, WMC employees are asked to support the Annual Fund, which provides operating support for the College. WMC depends on gifts from alumni, trustees, faculty, staff, friends, businesses and foundations to bridge the gap between operational expenses and income from tuition and other sources.

*It's Crunch Time!* Now, more than ever, your support affirms your love of the Hill. As the College continues to get better and better, your contribution is an impressive statement to corporations and foundations from which WMC is seeking funding; to current students who are our future alumni; and to alumni who still look up to you, regardless of the years that distance them from the Hill.

Last year, 84 members of the faculty and staff contributed in excess of \$16,000...an exciting accomplishment. This year we can top that mark with your help. Our goal is to increase participation by the staff by 23 members. We can do it!

I hope you will join me in continuing the tradition of giving at WMC by supporting the Annual Fund. You may designate your gift to student scholarships, academics, student life or WMC's greatest need. Your gift, *regardless of size*, is very important to us. Thank you for making WMC a special place.

Sincerely,

Name  
Chair

P.S. You may also deduct your gift from your paycheck by choosing the payroll deduction option on the enclosed pledge card. Just \$5 per pay period yields \$130 a year toward the continuing efforts of WMC to offer students on the Hill a quality education.

APPENDIX L

CARNEGIE MELLON EMPLOYEE GIVING LETTER SAMPLE

January 2002

«name1»  
«Title»  
«Department»

Dear «salutation»,

Thanks to everyone who made a gift last year, the Faculty and Staff Campaign was a great success! We received a total of \$143,000 from over 600 donors.

**Your gift can make these numbers grow.**

Our personal gift commitments demonstrate that we, who know the university best, are dedicated to ensuring a future of continued excellence. As a member of the university community, we thought you might want to hear some words of appreciation from one of our seniors:

*"In my time at Carnegie Mellon, I have experienced an amazing array of technology in the classroom and beyond. With the help of generous donors, our classes and labs are filled with high-tech equipment that let us access an incredible amount of knowledge.*

*Scholarships, new equipment, classrooms and new buildings are just some of the benefits that even a small donation provides."*

— Student Quote, E2002 (In letter to donor, student name was given)

Please take a moment to read the enclosed information and join us in our commitment to our students. Consider a gift of \$100, \$50 or \$25. Gifts, *in any and all amounts*, are gratefully accepted.

A convenient way to give is by payroll deduction (form due by the 15<sup>th</sup> of the month you want the deduction to begin). You can also make your gift by check or credit card; we've enclosed a reply envelope.

Don't forget – if you have a **spouse** who works for a **matching gift company**, the value of your gift will be enhanced.

**Thank you for your dedication and generosity.**

(Letters signed by individuals who hold these positions)

Faculty/Staff Committee Co-Chair	Faculty/Staff Committee Co-Chair
E1976, E1987	Office Assistant
Principal Lecturer	Provost's Office
Civil & Environmental Engr.	

Co-Chairs of the Faculty and Staff Committee

P.S. Your gift is important! If you have any questions, please call  
XXXXXX at 268-XXXX.

APPENDIX M

SUU EMPLOYEE GIVING LETTER – FINAL VERSION



Dear Colleagues:

During the past few years, a quiet but very important shift has occurred in the way SUU is funded. Access to public funding has grown extremely competitive and our need for private funding has become essential.

Our school, along with all other institutions of higher education in Utah, must accept a major paradigm shift that the state no longer fully-funds state institutions but provides state assistance. Because of this, SUU will increasingly depend on its own strategies to raise money. This means turning to private and corporate sources for grants, endowments, gifts and scholarships. As these funding sources consider SUU, they will want to know that the institution is acting to help itself. If a high percentage of employees are contributing to the institution's growth, donors are more likely to help.

With this in mind, SUU's current *The Future is Rising* campaign is asking faculty, staff and administrators to contribute to the fund raising effort. The most important part of this effort is the percentage of employees who participate. Consider what our collective efforts, and giving up a few sodas each month, will add to the University each year:

\$1/pay period = \$16,000+	\$2.50/pay period = \$40,000+
\$5/pay period = \$81,000+	\$10/pay period = \$163,000+

The future is rising at SUU and with it a clarity of vision that will give us more control over our own financial future. In this environment, any contribution made by employees of SUU will be a capital investment in our own future. As always, you may designate how your contribution is used; there are a myriad of options. But more important than the amount or the designation of the contribution is the fact that we generate the highest level of participation. This participation will be the critical mass that gives President Benson, who is leading this campaign, the leverage he needs to secure the support of private and corporate donors.

Please help by taking a minute right now to pledge an amount regardless of its size. In doing so, you will help yourself and this campaign as the University takes an important step in securing the future of fund raising at SUU.

Sincerely,

Matt Barton  
Lynne Brown  
Ron Cardon  
Jim Harrison  
Eric Houle  
Clarisse Lunt  
Linda Marriott

## APPENDIX N

### COMMON QUESTIONS AND ANSWERS FOR TEAM CAPTAINS

## Questions and Responses regarding Employee Giving

1. Where will my donation go?

Answer: Anywhere you want. You have the ability to direct your donation to any program, department or college of your choosing. You can view a list of possible designations and named scholarships by going to [www.suu.edu/academics/catalog/2007/appendixB.pdf](http://www.suu.edu/academics/catalog/2007/appendixB.pdf)

2. Why doesn't the state of Utah provide all of SUU's funding needs?

Answer: Higher education institutions are increasingly looking to private sources to meet funding issues. Our paradigm must shift from viewing ourselves as being funded 100% by state to one that is state assisted.

3. How does *The Future is Rising* campaign benefit me?

Answer: *The Future is Rising* campaign is a comprehensive fundraising effort that will benefit all of campus. This campaign will include building projects, scholarships and endowments.

4. How can I make a financial contribution to SUU when I don't get paid enough?

Answer: We recognize that everyone's situation is not the same and that everyone cannot give the same. This Employee Giving campaign stresses participation and not a specific dollar amount, so give what you can. Consider what our collective efforts, and giving up a few sodas each month, will add to the University each year:

\$1/pay period = \$16,000+	\$2.50/pay period = \$40,000+
\$5/pay period = \$81,000+	\$10/pay period = \$163,000+

Don't forget that as SUU grows so does the amount of assistance received from the state of Utah.

5. How can I donate when we have not had many pay raises and I make below industry standard?

Answer: Today is a new day. We need to look to the future and realize that we have a young president that is energetic, bold and courageous. He is going to "bat" for us and is doing all he can to increase our pay. He and other administrators worked with Senator Dennis Stowell this past legislative session to push through Senate Bill 103. SB 103 would have added \$2 million in ongoing budget dollars to SUU. Even though the Legislature did not pass SB 103 as it was originally written, it does show that SUU Administrators are being proactive in securing increased funding from the state of Utah.

6. I donate enough time and energy to SUU, why should I donate money too?

Answer: We all appreciate your hard work and long hours. However, those extra hours are difficult to quantify for external uses. Now is the time to take charge of our future and look at the long term benefits of contributing financially to the University. High participation among SUU's own employees will provide traction and leverage in accessing private and public dollars. Philanthropists, foundations, corporations and other private funding sources want to know what SUU's own employees are doing to help the University.

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What's being said about the importance of Employee Giving:

"The legislature always looks at the level of private and other funding before committing state funds. The higher the level, the more likely the legislature is to commit state funds. This is true for almost all state appropriations – from programs to student support to buildings. The more we can raise institutionally, the higher the likelihood of getting state funds."

--Wes Curtis, Assistant to the President and SUU Legislative Liaison

"Employee giving is essential to the success of our comprehensive campaign. We gain important leverage in securing significant gifts if we can demonstrate to donors that SUU's own employees are doing what they can financially to advance the institution."

--Stuart Jones, Vice President for Institutional Advancement



## APPENDIX O

### TEAM CAPTAIN TALKING POINTS

## SUU Employee Giving Campaign

### Team Captain Talking Points

- The President is launching a comprehensive campaign
- An essential component of his larger campaign is an employee giving campaign
- When the President, Stuart Jones and other development officers approach foundations, businesses or philanthropists, we can provide them with traction and leverage in securing the large gifts if they can say "look what our own employees are doing." It shows the employees' support for the campaign and what is taking place at SUU.
- This employee giving campaign stresses participation not dollar amount. Employees can designate where their contribution will go -- pick what you're passionate about and donate there.
- We are dividing the campus into teams to create some competition. Teams that get 100% participation will be recognized at a lunch with the President. They will also receive a poster to hang in their offices recognizing their accomplishment.
- All types of donations count -- payroll deductions, phonathon gifts, yearly donations, checks written out at a specific event, etc...
- Responsibilities of team captains:
  - Make the ask your teammates
  - Present the idea in a staff meeting and then follow-up individually with each employee
  - Provide encouragement to your team
  - Attend a training where you will receive materials, learn about the comprehensive campaign, have questions answered and be provided with tips on approaching your teammates. Choose one of three to attend: March 27 or March 28 at 2 p.m.
- We will provide captains with a packet including the following:
  - Letter from the chairs
  - Gift card that will have broad categories for donations or a place to designate a donation.
  - Security envelope for sealing the gift card.
  - Coupon for a free 21 oz drink at the C-Store (donated by the Bookstore).

APPENDIX P  
TALKING POINTS FOR VICE PRESIDENT FOR INSTITUTIONAL  
ADVANCEMENT

Stuart Jones' Talking Points for Employee Giving Campaign  
Thursday, March 27, 2:00 p.m.  
Friday, March 28, 2:00 p.m.  
Emma Eccles Jones Education Building, Room 203

I'm thinking that your remarks might be a great way to end the training. I'm flexible with your schedule. So let me know if you would prefer to do your part right at 2 p.m.

- Brief overview of the capital campaign. What will it accomplish? How will it impact each college and department? What is the benefit of the campaign to SUU employees?
- Reiterate your perspective on the importance of an Employee Giving Campaign.
- Pointers on what to expect when a Team Captain approaches a colleague. You mentioned earlier that colleagues are inclined to unload on a Team Captain. Share ideas on how to deal with that unloading.
- Share effective words and phrases when asking for a donation.
- Share any pitfalls of asking for a donation and then share how to avoid those pitfalls.
- Provide us with any words of wisdom or encouragement. Basically infuse Team Captains with excitement and a desire to get their part done.

VITA

Ron Cardon was born in Cedar City, Utah. He is a 1996 graduate of Southern Utah University where he earned a Bachelor of Arts Degree majoring in Communication and Spanish with a minor in Business Administration. Following graduation he completed an internship with Cedar City Corporation working in the Economic Development Office. For six and half years he was employed by Five County Association of Government overseeing numerous volunteer programs in Iron, Beaver and Garfield Counties. For the past four years he has been employed by Southern Utah University as the Associate Director of Alumni Relations, two year of which he directed the university's annual giving program.