2022 University of Florida Campaign for Charities
Prospective New Agency – Application Workshop
UFCC New Agency Application
Workshop and Information Session Agenda

Welcome and Introductions
Campaign History
UFCC Overview
Campaign Structure
Important Dates & Campaign Cycle
UFCC Application & Documents
Approval Process
Appeal Process
Q & A
Next Steps
CAMPAIGN HISTORY

THE UNIVERSITY OF FLORIDA CAMPAIGN FOR CHARITIES (UFCC) IS THE OFFICIAL ANNUAL EMPLOYEE GIVING CAMPAIGN.

MORE THAN $27,000,000.00 DONATED SINCE 1989

UF EMPLOYEES HAVE GIVEN ~$1,000,000.00 PER YEAR FOR THE PAST 17 YEARS

Alzheimer’s Association

ACORN Clinic
THE CAMPAIGN HAS GROWN FROM **39** AGENCIES (IN 1993) TO **95** AGENCIES (IN 2022)
## 2021 SEC School Comparison

<table>
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<tr>
<th>University</th>
<th>2021 Totals</th>
<th>Participation</th>
<th>2020 Totals</th>
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<tbody>
<tr>
<td>University of Florida</td>
<td>$1,038,108</td>
<td>14%</td>
<td>$982,612</td>
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<td>University of Alabama</td>
<td>$437,458</td>
<td>73%</td>
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<td>University of Missouri</td>
<td>$410,655</td>
<td>6%</td>
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<td>University of Tennessee</td>
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<td>University of Kentucky</td>
<td>$190,943</td>
<td>4%</td>
<td>No report</td>
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<td>University of Mississippi</td>
<td>$104,933</td>
<td>8%</td>
<td>No report</td>
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<td>Auburn University</td>
<td>$109,396</td>
<td>15%</td>
<td>$108,991</td>
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<td>University of Georgia</td>
<td>$2,748</td>
<td>&lt;1%</td>
<td>$11,429</td>
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<td>University of Arkansas</td>
<td>$97,504</td>
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<td>LSU</td>
<td>$47,395</td>
<td>2%</td>
<td>$57,180</td>
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<td>University of South Carolina</td>
<td>$48,494</td>
<td>1%</td>
<td>$40,153</td>
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<td>Texas A&amp;M University</td>
<td>$574,165</td>
<td>7%</td>
<td>$683,525</td>
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<td>Mississippi State University</td>
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<tr>
<td>Vanderbilt University</td>
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EMPLOYEE PARTICIPATION

ALL UF EMPLOYEES CAN PARTICIPATE BY MAKING CHARITABLE DONATIONS TO AGENCIES OF THEIR CHOICE THOUGH PAYROLL DEDUCTION, CASH, CHECK, CREDIT CARD OR STOCK CONTRIBUTION.

OTHER DONORS – NOT AFFILIATED WITH UF – CAN ALSO PARTICIPATE VIA CASH, CHECK, CREDIT CARD, AND STOCK TRANSFER.
UFCC CONTRIBUTIONS

EMPLOYEES CAN GIVE TWO TYPES OF GIFTS TO THE UFCC:

A **DESIGNATED** GIFT – SPECIFYING A SPECIFIC AGENCY/AGENCIES**

AN **UNDESIGNATED** GIFT – GIVING TO THE GENERAL CAMPAIGN
UNDESIGNATED GIFTS:

DISTRIBUTED TO AGENCIES / FEDERATION *BASED ON PERCENTAGE THEY RECEIVE FROM DESIGNATED GIFTS**

IN 2021, THIS INCREASED AGENCY GIFTS BY ABOUT 28%!

AN AGENCY THAT RECEIVED $10,000 IN DESIGNATED FUNDS ALSO RECEIVED $2,800 IN UNDESIGNATED FUNDS, RAISING THEIR TOTAL GIFT TO $12,800 IN 2021.
UF Campaign for Charities

AGENCY PARTICIPATION

TO PARTICIPATE, AGENCIES MUST BE NONPROFIT AND MUST ADDRESS HEALTH, SOCIAL SERVICE, DIVERSITY, RELIEF, DEVELOPMENT OR ENVIRONMENTAL ISSUES OF LOCAL IMPORTANCE.

AGENCIES MUST APPLY EACH YEAR FOR THE CAMPAIGN AND BE APPROVED BY MEETING ALL THE REQUIREMENTS OF THE APPLICATION.
AGENCY ROLE

MAKE DONOR DATABASE AWARE OF THE UFCC

LET DONORS KNOW THAT GIVING THROUGH THE UFCC CAN INCREASE THEIR DONATION BY 28%

USE UFCC GRAPHICS IN NEWSLETTERS, SOCIAL MEDIA, WEBSITES

OFFER TO SPEAK AT UNIT / COLLEGE EVENTS, MEETINGS, ZOOMS
AGENCY ROLE

FIND CONNECTIONS TO YOUR MISSION ACROSS CAMPUS

PROVIDE A BRIEF MISSION DESCRIPTION

PROVIDE AGENCY PHOTOS FOR UFCC GIVING SITE, FACEBOOK AND TRAINING USE

PARTicipate in the KICKOFF EVENT
CAMPAIGN DETAILS

UF LEADERSHIP AND STRUCTURE
UF Campaign for Charities

REGULATIONS AND GOVERNING PROCEDURES

• SET BY OUR BOARD OF TRUSTEES
  • APPLICATION PROCESS
  • AGENCY REQUIREMENTS
  • PLANNING COMMITTEE STRUCTURE AND TERMS
  • APPROVAL AND APPEALS PROCESS

CAN BE FOUND ON OUR WEBSITE UNDER FAQ TAB
2022 UFCC PLANNING COMMITTEE

12 MEMBERS APPOINTED BY PROVOST

GENERAL CHAIR AND LEADERSHIP CHAIR

OVERSEES UFCC ACCORDING TO UF REGULATIONS

DETERMINES CAMPAIGN GOAL

REVIEWS AGENCIES - DETERMINES WHICH WILL QUALIFY FOR THE UFCC

AMIkids Gainesville

Pace Center for Girls

Operation Catnip

K9s for Warriors
2022 UFCC STEERING COMMITTEE

DEANS/VPS APPOINT TWO MEMBERS FOR EACH COLLEGE/UNIT

MEMBERS RECRUIT VOLUNTEERS AND HELP RUN CAMPAIGNS IN THEIR UNIT

THERE ARE ABOUT 200+ VOLUNTEERS ACROSS CAMPUS
UFCC FISCAL AGENT – UNITED WAY

THE UNITED WAY SERVES AS THE FISCAL AGENT FOR THE UFCC

EACH YEAR, THEY PRESENT A DETAILED CAMPAIGN BUDGET PROPOSAL TO UFCC PLANNING COMMITTEE FOR APPROVAL

THE FISCAL AGENT FEE FOR 2022 WILL BE 4.5%
UNITED WAY CAMPAIGN ROLE

ASSISTS IN THE APPLICATION REVIEW PROCESS

ASSISTS WITH PRINTED MATERIALS

MANAGES THE ONLINE GIVING SYSTEM

MANAGES CASH, CREDIT CARD AND CHECK DONATIONS
UNITED WAY FISCAL AGENT

UW DISTRIBUTES FUNDS TO AGENCIES ON A QUARTERLY BASIS

PAYMENTS ARE MADE IN MAY, AUGUST, NOVEMBER AND FEBRUARY

(First-time agencies will not receive their first payment until May of the payroll deduction cycle)
CAMPAIGN DETAILS

CAMPAIGN CYCLE | 2023 DATES
UF Campaign for Charities - Year-Round Campaign Cycle

- DECEMBER – AGENCY APPLICATION OPEN
- JANUARY – ANNOUNCE PRIOR YEAR CAMPAIGN TOTAL
- FEBRUARY – AGENCY APPLICATION CLOSES
- MARCH – AGENCY APPLICATION REVIEW
- APRIL – FIRST ROUND AGENCY DECISIONS
- MAY – AGENCY APPLICATION APPEAL PROCESS
- JUNE – FINAL AGENCY DECISIONS
- JULY – CAMPAIGN MARKETING & PLANNING
- AUGUST – AGENCY AND COORDINATOR TRAINING
- SEPTEMBER – LEADERSHIP CAMPAIGN & KICK OFF EVENT
- OCTOBER – GENERAL CAMPAIGN & SPECIAL EVENTS
- NOVEMBER – GIVING TUESDAY
UFCC LEADERSHIP CAMPAIGN

- Considered to be Leadership Category Employees who made gifts > $500
- Communicate with employees who earn > $50,000
- Leadership gifts (> $500) accounted for 80% of employee giving
2022 UFCC GENERAL COMMUNICATIONS

UFCC POSTCARD
INTRODUCTORY EMAIL
WEEKLY EMAILS
MYUFL SPLASH PAGE
UF AT WORK – HR EMAIL
SOCIAL MEDIA POSTS

GENERAL CAMPAIGN
2023 UFCC DATES

SEPTEMBER 5 THROUGH OCTOBER 20
LEADERSHIP & GENERAL

Ctr for Independent Living
St. Francis House
Planned Parenthood
UFCC KICK OFF EVENT
FOR ALL UFCC VOLUNTEERS & AGENCIES

TWO AGENCY REPRESENTATIVES
SET UP AGENCY TABLE
BRING DISPLAYS AND BANNERS
BROCHURES AND GIVE AWAYS
CONNECT WITH VOLUNTEERS
Organized by Steering Committee members and volunteers

SPECIAL EVENTS

Dessert Social on the Lawn
Tigert Hall

Featuring Homemade Desserts as follows:
Banana Pudding, Cherry-Cola Dump Cake, Tropical Sunshine Cupcakes, Strawberry Cake, Mexican Wedding Cookies, Chocolate Fudge, Coconut Pie, Nut-A-Roo Bars, Swirl Cream, Pound Cake, Kahlua Cake, Ranger Cookies, Pecan Candles, Chocolate Truffles, etc. and Milk/Dairy-Free Milks

surprise celebrity judge... STEVE SPURRIER!

Health & Human Performance vs Journalism and Communications
PAPER AIRPLANE CHALLENGE
Wednesday, Oct. 9 @ 2PM
Meet at the ramp between FL Gym and the Stadium

2019 UF Campaign for Charities hhp.ufl.edu/events

donation per entry is ONLY $5
Prizes for most creative and longest distance.

chuck one for charity!

e-mail swagner@ufl.edu to sign up early!
It’s GivingTuesday - donate now to the UFCC and join a global generosity movement that seeks to transform communities and the world. Your donation to the UFCC goes directly to support local agencies who are committed to ending homelessness, improving education, protecting the environment, caring for those in need, researching treatments and cures for diseases, finding loving homes for abused or abandoned pets, and many other worthwhile causes that help make North Central Florida a great place to live. Visit https://ufcc.ufl.edu/ today and celebrate generosity.

Because of the generosity of UF employees like YOU, the 2021 UF Campaign for Charities has raised more than $1,000,000 to support local agencies committed to ending homelessness, improving education, protecting the environment, caring for those in need, researching treatments and cures for diseases, finding loving homes for abused or abandoned pets, and many other worthwhile causes that help make North Central Florida a great place to live.

It’s not too late to MAKE A GIFT and show you care. This GivingTuesday (11/30/21), we hope you’ll consider making a gift through the UFCC to support one or more of the 100 agencies participating in this year’s campaign.

One of the advantages of making a gift through the UFCC is that undesignated funds are shared among all agencies, increasing the size of your gift by approximately 24 percent! You also can make a gift through payroll deduction, thus spreading your gift across the course of several months or a year.

Thank you again for all that YOU do to make the University of Florida, Gainesville and North Central Florida a great place to work and live.

To make a gift, please go to ufcc.ufl.edu and click the appropriate link under "Donate Now" link. You also can go to the myUFL secure sign on > My Self Service > UFCC Sign On, which will direct you to the UFCC pledging site. You can designate your gift to specific agencies or choose to give an undesignated gift that will be divided among all the agencies.
CAMPAIGN DETAILS

AGENCY APPLICATION PROCESS
UF Campaign for Charities – APPLICATION PROCESS

• AGENCY APPLICATION COMPLETED IN FULL (WITH ALL REQUIRED DOCUMENTATION) BY FEBRUARY 1, 2023
  • APPLICATION IS ONLINE ONLY – UPLOAD DOCUMENTS
• COMMUNITY RELATIONS INTERNAL REVIEW UPON RECEIPT
  • OPPORTUNITY TO CORRECT DEFICIENCIES BEFORE FINAL REVIEW
• APPLICATION REVIEW BY PLANNING COMMITTEE AND FISCAL AGENT
  • MISSION, IMPACT, OVERHEAD PERCENTAGE
• FIRST ROUND APPLICATION DECISIONS
  • APPROVED – VIA EMAIL
  • CONDITIONALLY APPROVED - VIA CERTIFIED LETTER
  • DENIED - VIA CERTIFIED LETTER
• APPEAL PROCESS
• FINAL DISPOSITION OF AGENCIES
CAMPAIGN DETAILS

AGENCY APPLICATION
UF Campaign for Charities – APPLICATION TIPS

• CONTACT INFORMATION – CRITICALLY IMPORTANT!!
• FEDERATION – CREATING HEALTHIER COMMUNITIES, UNITED WAY, OR INDEPENDENT (NOT AFFILIATED WITH EITHER)
• MISSION DESCRIPTION - ESTABLISHED ORGS
• COUNTIES SERVED (IMPACT WORKSHEET)
• DOCUMENTATION
  • FILE SIZE – MAX 1 MB (MAY NEED TO REDUCE 990)
  • EXPIRATION DATES / APPLICATIONS NOT ACCEPTED
  • LEGIBILITY
• OVERHEAD PERCENTAGE CALCULATION = MANAGEMENT + FUNDRAISING EXPENSES / TOTAL REVENUE
  • NOT OVER 25%
CAMPAIGN DETAILS

AGENCY DOCUMENTATION
UF Campaign for Charities – APPLICATION DOCUMENTS

- STATE OF FLORIDA DIVISION OF CORPORATIONS REGISTRATION (SUNBIZ.ORG)
- IRS TAX EXEMPT RULING LETTER – 501C3 DESIGNATION
- FLORIDA DEPARTMENT OF REVENUE SALES TAX-EXEMPT DOCUMENT
- FLORIDA DEPARTMENT OF AGRICULTURE AND CONSUMER AFFAIRS DOCUMENT SHOWING CHARITABLE DONATION REGISTRATION # OR DOCUMENT SUPPORTING EXEMPTION UNDER CHAPTER 496, FLORIDA STATUTES (CHECK A CHARITY – FDACS)
- IRS FORM 990 OR IRS FORM 990EZ PLUS PAGES 9 AND 10 OF IRS FORM 990
  - LATEST ONE ON FILE WITH IRS
- AGENCY BUDGET FOR CURRENT FISCAL YEAR
- ROSTER OF BOARD OF DIRECTORS
- WRITTEN POLICY OF NON-DISCRIMINATION AND AFFIRMATION ACTION
UFCC Application Worksheet for Documentation of Item #12

Directions: Please list your agency’s main services in 2022 and how much was spent on each one. List the number of people served by those services in each county. Please put a zero in counties not served. Total number of people served by each service should go in the last column. Fill in amount spent in 2022 on services and research at the bottom.

Agency name:

Goals and Objectives:

<table>
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<tr>
<th>Agency Service(s)</th>
<th>Expenditures</th>
<th>Alachua</th>
<th>Bradford</th>
<th>Clay</th>
<th>Columbia</th>
<th>Gilchrist</th>
<th>Levy</th>
<th>Marion</th>
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Total amount spent by agency in the Alachua County region in calendar year 2022 on programs and services (not research):

Total amount of spent by agency in the Alachua County region in calendar year 2022 on research:

Note: Documentation of this information should be attached to your application (for example: agency audit, program brochures, annual report)
CAMPAIGN DETAILS

APPEAL PROCESS
UF Campaign for Charities – APPEAL PROCESS

• CONDITIONALLY APPROVED
  • DOCUMENTATION OR CLARIFICATION
  • PROVIDE BY DEADLINE
  • REVIEW BY PLANNING COMMITTEE
  • APPROVED/DENIED

• DENIED
  • WILL PROVIDE REASON
  • OPPORTUNITY TO APPEAL DECISION
  • ATTEND MEETING IN PERSON, VIA PHONE/ZOOM, OR IN WRITING
  • REVIEW BY PLANNING COMMITTEE
  • APPROVED OR DENIED

• DECISIONS ARE FINAL!
WHY UFCC?

CAMPAIGN MESSAGING
WHY PARTICIPATE IN UFCC?

EASE OF PAYROLL DEDUCTION

UFCC DONORS AND VOLUNTEERS

AGENCIES RECEIVE PORTION OF UNDESIGNATED FUNDS, INCREASING GIFTS BY A SIGNIFICANT AMOUNT (IN 2021, DONATIONS WERE INCREASED BY ~ 28%)!
GATORS VOLUNTEER

AGENCY CONNECTIONS
BUILDING ON THE SUCCESS OF GATORS GIVE
Connecting UF Employees to Volunteer Opportunities

How Can I Participate?

The Gators Volunteer website will be open year-round. During the campaign held in the spring, UF employees will receive e-mails from Gators Volunteer with links to this online volunteer database. Employee leaders may also choose to receive notifications to remind them of upcoming volunteer opportunities.
VOLUNTEER OPPORTUNITIES

UFCC-APPROVED AGENCIES

AGENCY APPLICATION PROCESS

ALACHUA COUNTY PUBLIC SCHOOLS

ON-CAMPUS OPPORTUNITIES

www.GATORSVOLUNTEER.ufl.edu
NEXT STEPS

COMPLETE ONLINE APPLICATION BY FEBRUARY 1, 2023

ENSURE ALL DOCUMENTATION IS CURRENT

VISIT UFCC.UFL.EDU FOR CAMPAIGN DETAILS AND INFO

QUESTIONS: UFCC@UFL.EDU