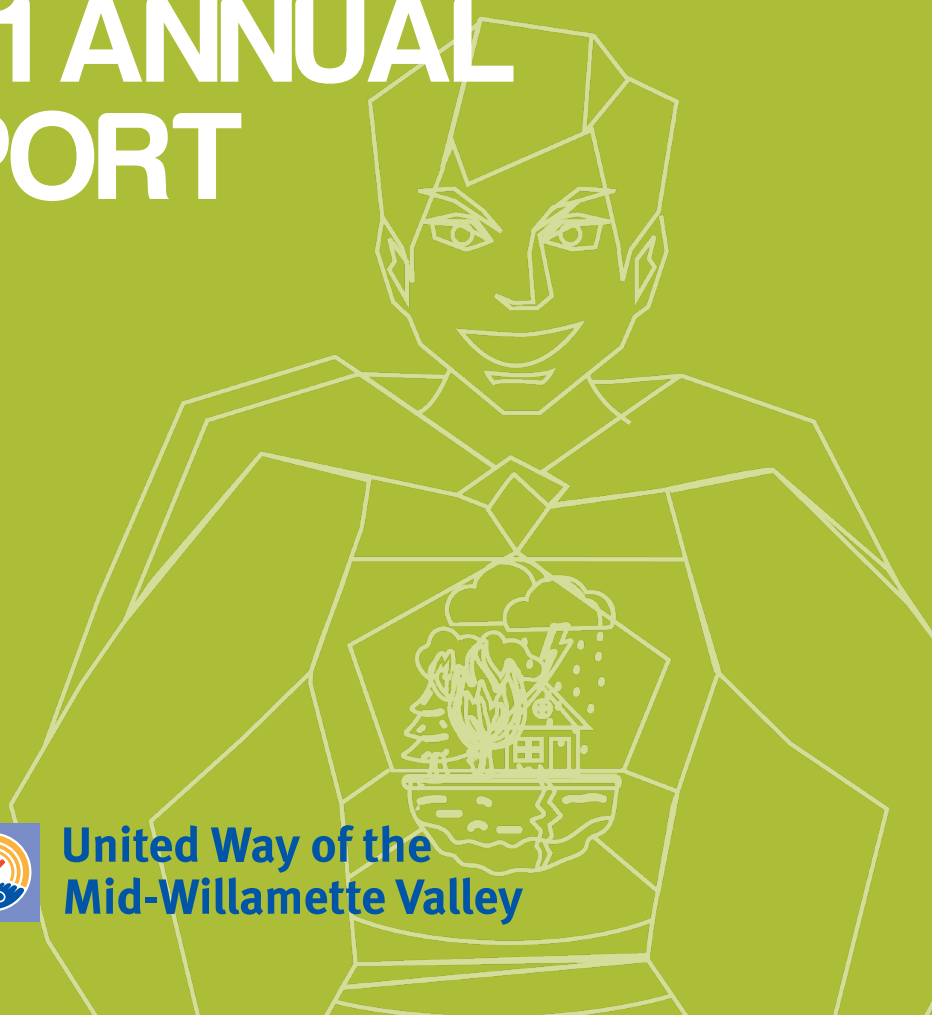




**OREGON
EMPLOYEES
CHARITABLE
FUND DRIVE**

The Employees' Charitable Fund Drive

2021 ANNUAL REPORT



**United Way of the
Mid-Willamette Valley**

2021 Oregon State Charitable Fund Drive
Annual Campaign Report
Total Raised: \$736,843
Employee Participation: 2.9%

The Charitable Fund Drive (CFD) Committee goal for 2021 Campaign: To increase overall campaign revenue by 10%.

With the statewide pandemic still in effect carrying over from 2020, the workplace campaign charitable landscape was still a challenging environment to raise funds in due to a still large remote work environment, Covid disruptions, and a continuing shift in workforce dynamics. We did however see a 10% increase in the overall CFD campaign from the previous year with a .01% increase in employee participation over the previous year. The campaign also surpassed the pre-pandemic level of \$719,774 in 2019. As the managing partner for this campaign, we continue to learn important details about this campaign that allow us to adapt and increase growth.

Our main strategy this year really focused around campaign coordinators, coordinator communication, and training. It is a very time consuming process to identify and recruit coordinators from every state agency but vital in the success of this campaign. In past campaigns, we had been too passive. Specifically we increased our level of activity and were much more aggressive in following up with both high level agency officials and potential staff in ensuring that we had a viable campaign coordinator for every agency. Our proof of concept was met with results but there is still a lot of room for growth.

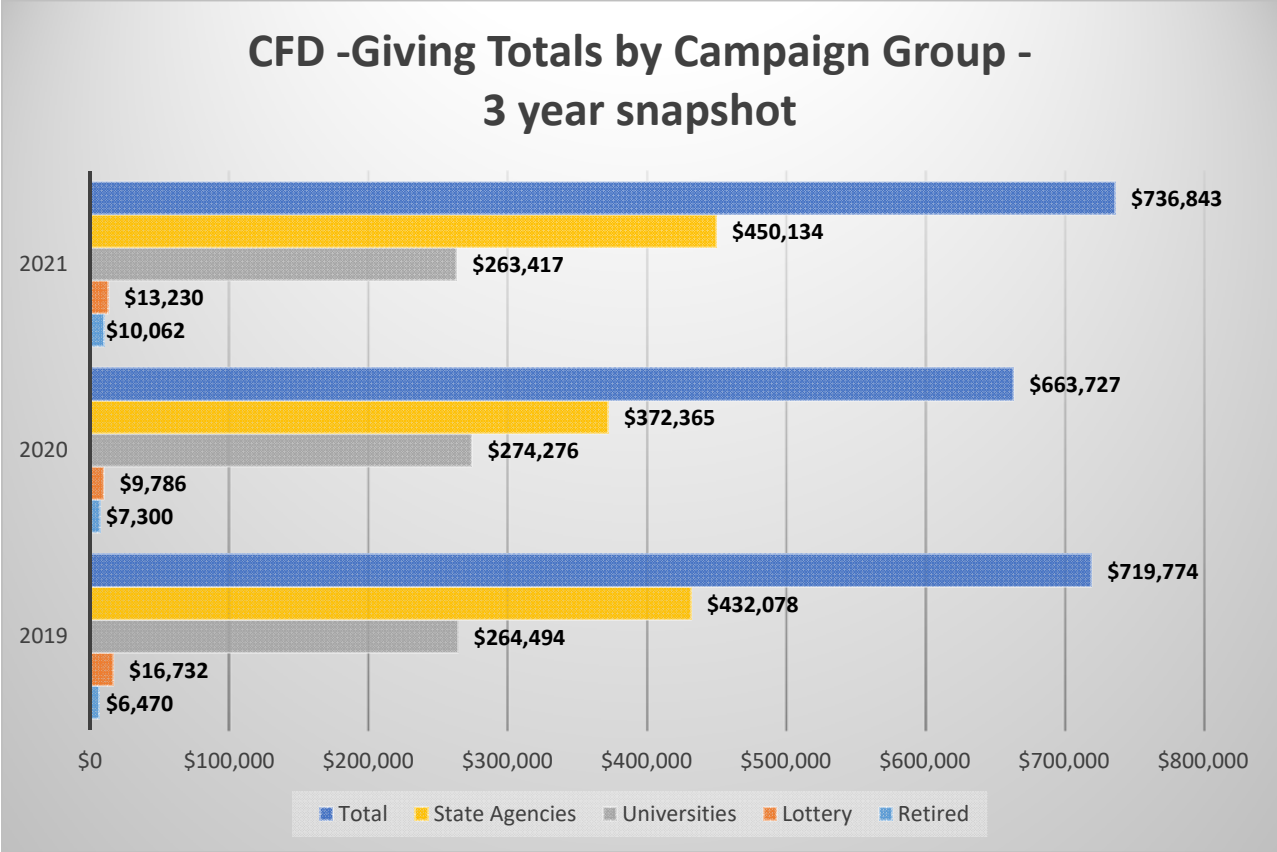
Another challenge that will continue is how to reach our prospective donors. We did increase our communication to the general state agency employee population through our partnership with DAS and delivered consistent and timely messaging through both newsletter and email communications. We continue to hear from employees after many communications that they “didn’t know about the campaign” or “didn’t know it was running” or “this is the first I have heard about it – glad to give.” We have to continue to seek out new ways and methods to creatively reach employees so that they have the opportunity to give.

Another expected area of growth as we come out of the pandemic will be an increase in fundraisers. While we did experience some growth this year (and had some really creative online fundraiser campaigns!), our total of close to \$4,000 in fundraisers is still only *about 10% of pre-pandemic fundraiser totals*. As we continue to adapt to a remote work place – there will be some opportunity for the return of in person fundraisers again next year.

Universities continue to be a source of concern. Those specific sub-campaigns continue to trend downwards. We have good contacts within the state agency system to help support our campaign and growth. (One example of this was our ability to get in front of the state agency leaders this past year). We do not have that level of contact with Universities. We need to work together with the CFD committee to garner a higher level of awareness and commitment from the highest levels of University Leadership.

Overall Campaign Report:

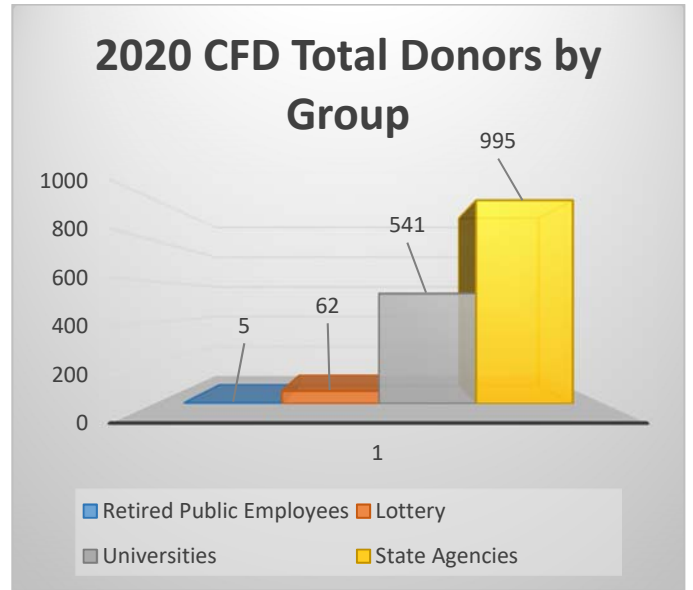
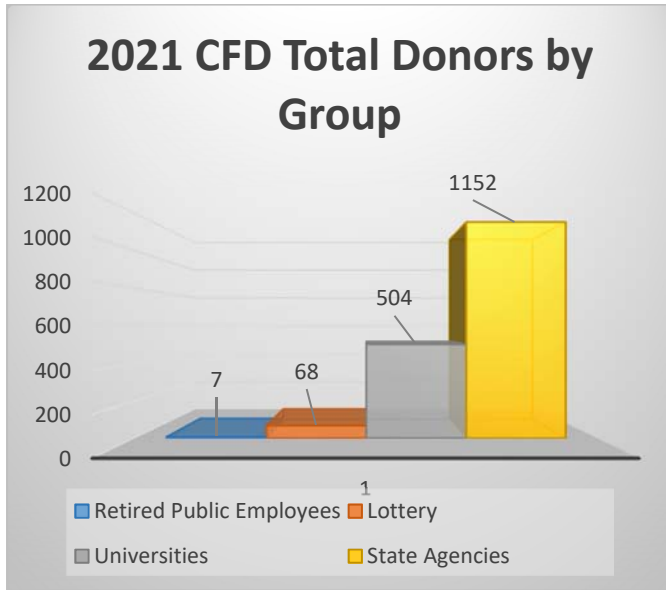
The CFD campaign is divided into 4 smaller sub-campaigns. State Agencies, State Universities, Oregon Lottery, and Retired Employees.
2021 Total Pledge/Gifts Comparison to previous years:



Overall Campaign Report (cont):

Overall between campaign years:

2021 Total Pledge/Gift by count Comparison to previous year:



Overall between campaign years by donor percentage increase/decrease:

	2019	2020	2021
State Agencies	-9%	-14%	+14%
Universities	-11%	+4%	-4%
Lottery	-17%	-42%	+26%
Retired	+20%	+12%	+27%

Method of Giving:

These tables summarize giving methods by totals between the 2020 and 2021 campaigns.

2020	Payroll Deduct	Check	Cash	Credit Card 1x	Credit Card 12x	ACH	
State Agencies	\$357,105	\$225	\$0	\$11,550	\$720	\$2,765	
Universities	\$218,458	\$100	\$0	\$51,539	\$2,744	\$1,435	
Lottery	\$7,160	\$0	\$0	\$2,071	\$0	\$555	
Retired	\$0	\$0	\$0	\$5,200	\$2,100	\$0	
Totals	\$582,723	\$325	\$0	\$70,360	\$5,564	\$4,755	\$663,727

2019	Payroll Deduct	Check	Cash	Credit Card 1x	Credit Card 12x	ACH	
State Agencies	\$387,262	\$20,836	\$14,707	\$8,797	\$360	\$116	
Universities	\$206,835	\$853	\$1,463	\$48,648	\$6,620	\$75	
Lottery	\$11,911	\$3,951	\$575	\$245	\$0	\$50	
Retired	\$0	\$0	\$0	\$4,100	\$2,370	\$0	
Totals	\$606,008	\$25,641	\$16,746	\$61,790	\$9,350	\$241	\$719,775

Fundraisers:

There was a big increase in creative online fundraising activity (if not dollars) this past campaign:

Activities included:

Raffles

Giving Jars

Baby Photo contests

Auctions

Recipe Books

Online Bingo

Virtual 5K

Amazing Race

Candy Jar Guess

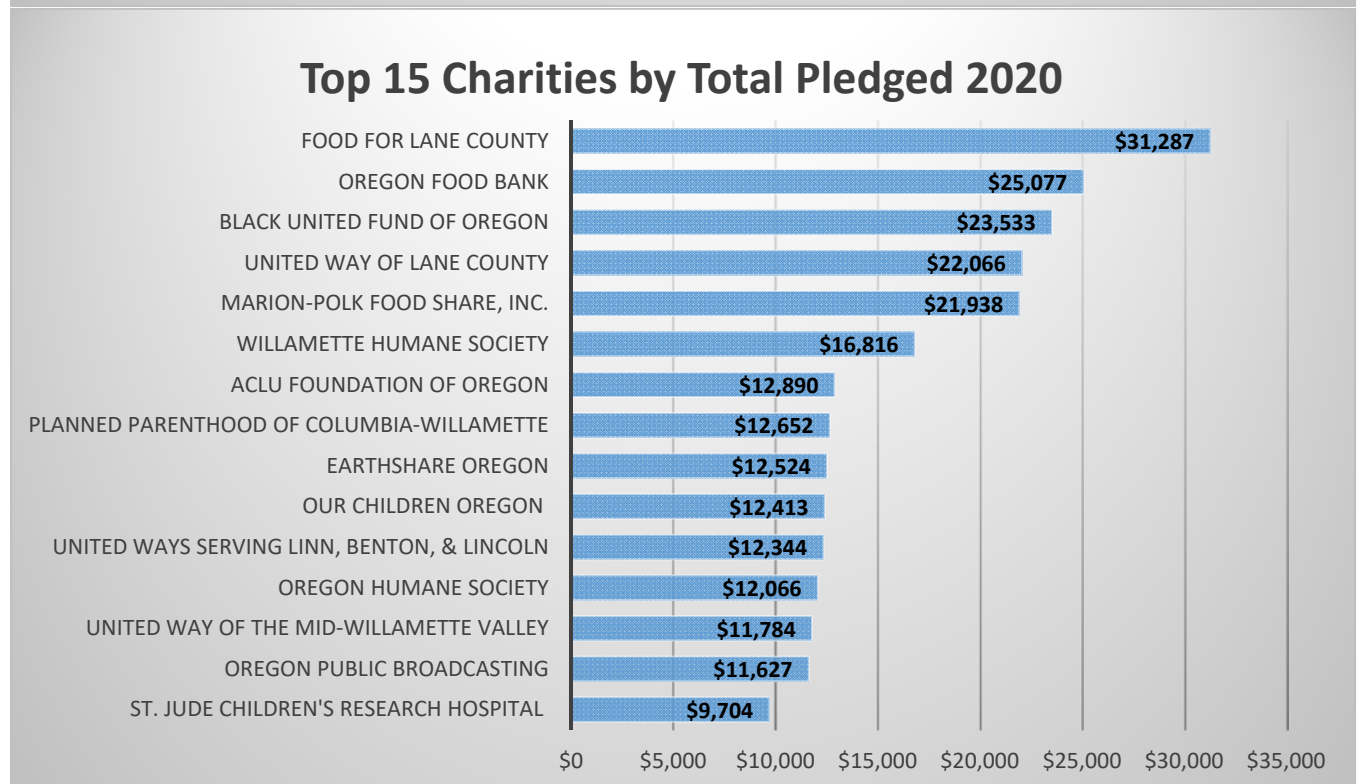
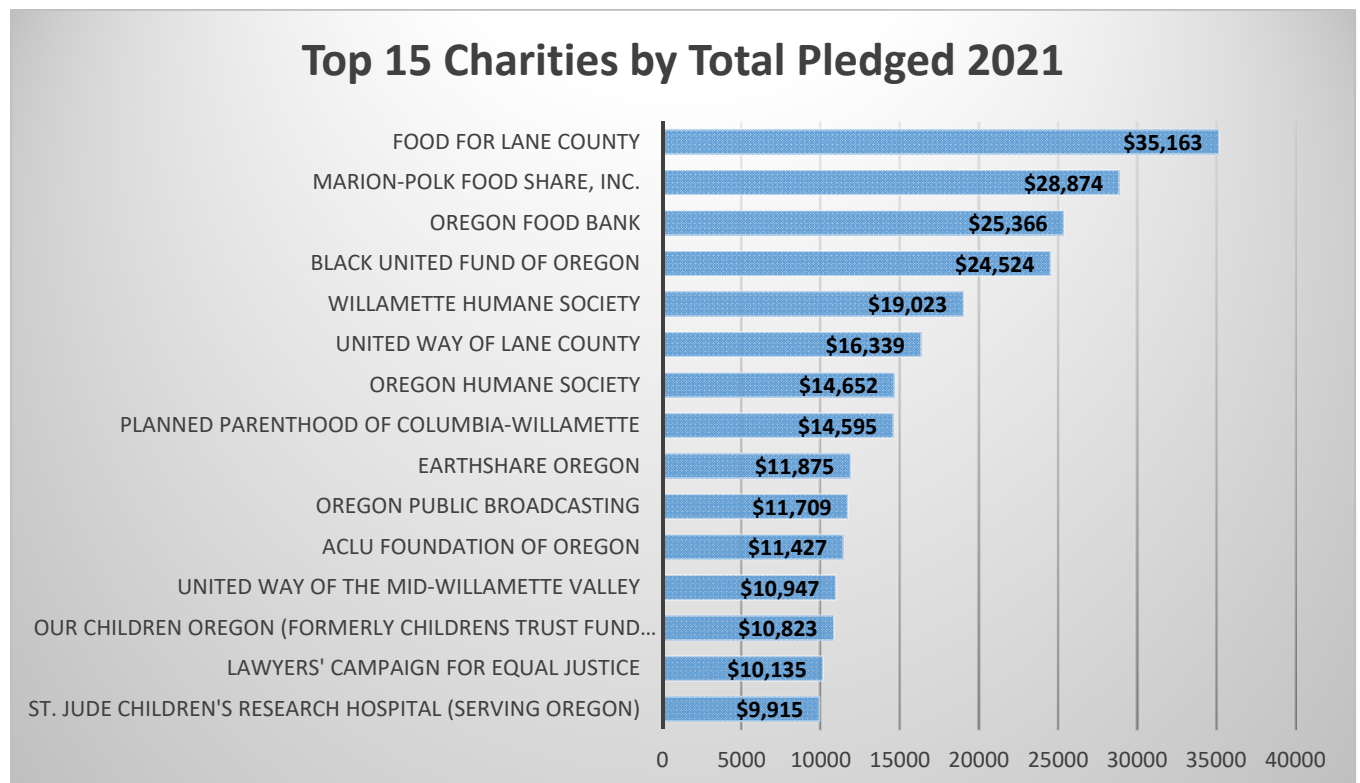
Costume Faceoff

Overall over 400 employees participated in various department fundraisers and raised over \$4,000 for selected charities.

Charities:

Overall, 564 charities were represented by 19 Federations and available for state employees to donate to. 447 charities received pledges/gifts that will be distributed quarterly from 2022 to early 2023.

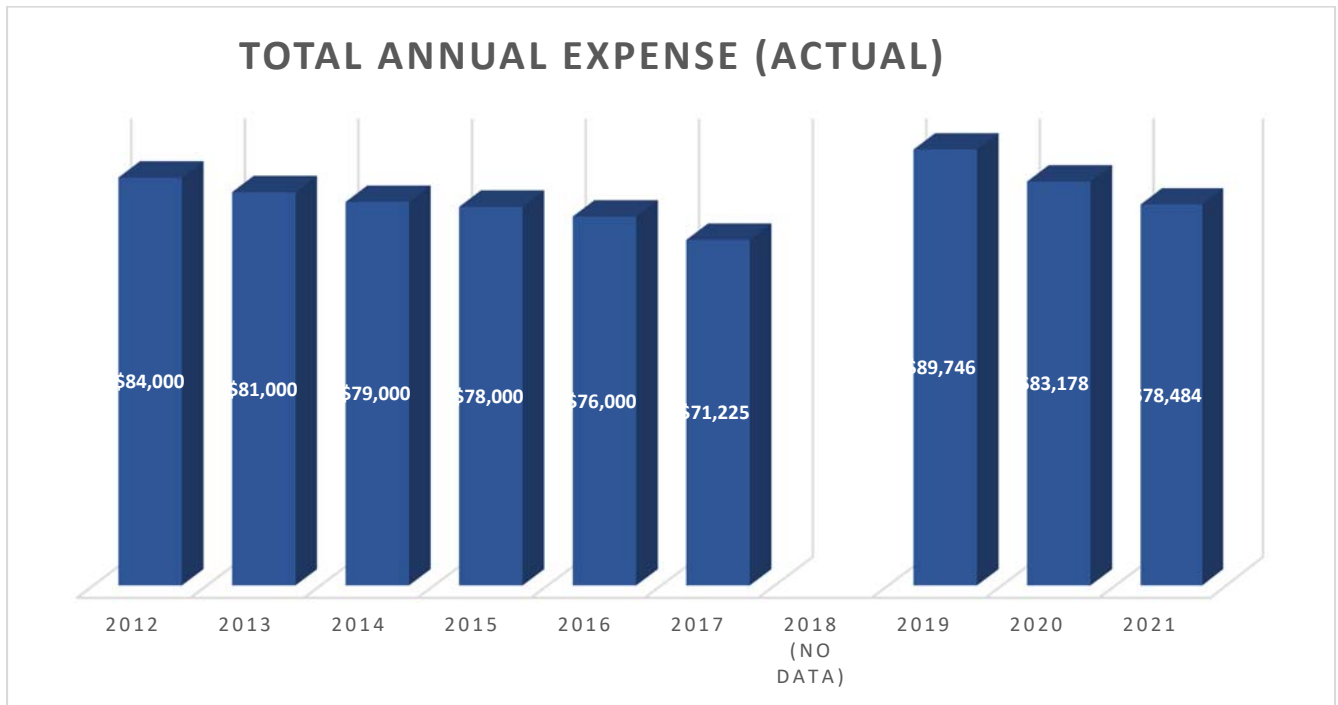
These are the top 15 charities statewide by total dollar raised/pledged:



Expenses:

Total expenses for the 2021 campaign year were \$78,484. This was 12% of campaign revenues.

This chart provides a year over year comparison of the Charitable Fund Drive CMO expenses since 2012:



Agency Summaries by total donor, total pledges/gifts vs. previous year:

Agency/Entity	2021 Donors	2021 Pledged	2020 Pledged
Accountancy, Board of	0	\$0	\$2,484
Administrative Services Dept	24	\$9,000	\$4,130
Agriculture, Dept of	10	\$10,634	\$10,704
Aviation, Dept of	3	\$1,620	\$2,295
Blind, Commission for the	7	\$852	\$2,066
Board of Examiners for Engineering and Land Surv.	1	\$480	\$0
Board of Naturopathic Medicine	8	\$2,860	\$0
Bureau of Labor and Industries	2	\$300	\$0
Construction Contractors Board	1	\$300	\$164
Corrections, Dept of	20	\$9,170	\$4,120
DCBS	52	\$17,104	\$16,295
Department of Geology and Mineral Industries	4	\$680	\$0
DHS - Department of Human Services	94	\$39,986	\$18,419
Education, Oregon Dept of	18	\$5,078	\$3,090
Employment Department	101	\$24,517	\$22,806
Employment Relations Board	9	\$2,830	\$0
Energy, Department of	31	\$11,731	\$8,412

Environmental Quality, Department of	82	\$30,567	\$24,433
Forestry, Dept of	20	\$11,876	\$9,276
Governor, Office of	1	\$600	\$1,695
Higher Education Coordinating Commission	7	\$3,649	\$5,259
Housing and Community Services, Dept	11	\$7,070	\$7,540
Judicial - Judges	2	\$625	\$600
Judicial Department	8	\$5,020	\$9,410
Justice Department	62	\$51,561	\$32,013
Land Conservation and Development, Dept of	5	\$2,162	\$2,520
Legislative Counsel, Office of	1	\$2,004	\$2,004
Legislative Fiscal Office	0	\$0	\$1,560
Library, Oregon State	9	\$4,639	\$4,514
Liquor Control Commission, Oregon	4	\$270	\$60
Lottery, Oregon State	68	\$13,230	\$9,786
Marine Board	2	\$720	\$1,500
Military Department, Oregon	7	\$3,004	\$4,020
Nursing, Board of	3	\$330	\$2,010
ODFW	16	\$2,695	\$3,300
ODOT/Department of Transportation	169	\$63,387	\$63,230
OHA/Oregon Health Authority	62	\$36,766	\$28,106
Oregon Board of Pharmacy	1	\$180	\$0
Oregon Business Development Department	8	\$3,420	\$2,220
Oregon Criminal Justice Commission	1	\$100	\$0
Oregon Institute of Technology	16	\$7,850	\$6,783
Oregon Medical Board	14	\$2,040	\$1,505
Oregon State Department of Police	8	\$1,572	\$0
Oregon State University	186	\$130,273	\$118,189
Oregon Youth Authority	12	\$4,360	\$840
Parks and Recreation Department	4	\$1,020	\$439
Portland State University	8	\$6,226	\$10,182
Public Employees Retirement System	70	\$17,577	\$19,665
Public Safety Standards and Training, Dept of	2	\$720	\$720
Public Utility Commission	11	\$4,884	\$1,300
Retired	7	\$10,062	\$7,300
Revenue, Dept of	56	\$14,216	\$13,519
Secretary of State	66	\$15,337	\$13,238
Southern Oregon University	14	\$3,315	\$3,530
State Board of Parole	1	\$240	\$0
State Lands, Department of	5	\$2,290	\$842
Teacher Standards and Practices	3	\$1,800	\$1,080
Treasury, Oregon State	16	\$6,488	\$5,820
University of Oregon	270	\$110,508	\$124,907
Veterans Affairs, Dept of	12	\$1,645	\$3,180
Water Resources Department	5	\$1,884	\$7,442
Watershed Enhancement Board	2	\$1,440	\$2,520
Western Oregon University	7	\$4,585	\$10,685

Charitable Fund Drive Profit & Loss Budget Overview

April 2021 through March 2022 Actuals/April 2022 through March 2023 Budget

	Apr '21 - Mar 22 Actuals	Apr '22 - Mar 23 Budget
Ordinary Income/Expense		
Income		
Income Allocated to Expenses	78,483.88	88,800.00
Total Income	78,483.88	88,800.00
Gross Profit	78,483.88	88,800.00
Expense		
Banking Expenses		
Credit Card Fees	3,304.23	3,500.00
Total Banking Expenses	3,304.23	3,500.00
Events		
Event Facilities & Fees	0.00	500.00
Event Food & Refreshments	0.00	700.00
Total Events	0.00	1,200.00
Insurance	500.00	500.00
Office Supplies	57.98	100.00
Postage	0.00	500.00
Printing & Associated Costs	0.00	500.00
Professional Services		
Audit	4,000.00	4,000.00
Professional Services - Other	66,947.62	74,550.00
Total Professional Services	70,947.62	78,550.00
Software & Licenses	3,674.05	3,700.00
Travel		250.00
Total Expense	78,483.88	88,800.00
Net Ordinary Income	0.00	0.00
Net Income	0.00	0.00