



Build a stronger community — and a stronger business.

A guide to giving and engagement for independent agents

Whether you're just getting started or already volunteering with a local nonprofit, this guide offers ideas and tips to support your giving efforts—and helps you share your passion with the world.



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This guide is just a tip of the iceberg. Visit the online resources for much more.

Visit the Liberty Mutual Agent Portal or Safeco Now for more resources, forms and templates to support your giving efforts. There you will find:

- Customizable email communications
- Social media posts to promote the work
- Project planning guides and checklists
- Budget templates
- Release forms and more
- Marketing training, tools and advice



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Giving matters to your community. It matters to your business, too.

According to our recent survey, about 60% of independent agents are involved with nonprofits and other causes in the community.

That sounds great, until you consider that 84% of consumers say it's important for a company to be involved with charitable giving.¹ Half of Americans say they would switch to a company that supports causes that align with their beliefs. An even greater percentage (61%) of Millennials and younger adults—you know, those audiences we're all trying to reach—agree.

If your agency doesn't have a giving plan, or if your community engagement could be stronger, **you might be missing out on several opportunities:**



The opportunity to help build a stronger community.



The opportunity to let people know your agency is committed to the community, which is a great way to attract new clients who also want to see the community succeed.



The opportunity to win up to \$10,000 for the non-profit you support.²

Whatever your goals are, the rest of this guide will show you how to get started, increase your involvement and get more out of your giving—even if you're not appointed with Liberty Mutual or Safeco.

Schedule time for employees

Many agencies provide staff with paid time to volunteer. That's a great way to show your investment in both the community and your team—according to Nonprofits Source, employees who engage in corporate giving programs have 75% longer tenures with their company.



¹Mintel Market Research 2018.

²Agency must represent Liberty Mutual Small Commercial or Safeco Insurance in order to be eligible for donation programs.

You don't have to start big. You just have to start.

For many agents, figuring out how to get started is the hardest thing about community engagement.



How do you choose an organization to support? And then, what do you do? Even if you don't have a ton of time or resources, you can still make a big impact. All it takes is four simple steps to get started:

1 Choose an organization

The organization you choose to support should reflect the values of your agency and your employees. But, how do you know what your employees value? Ask them! Here are few questions to get your started:

- What organizations and causes are you passionate about?
- What do you like to do outside of work?
- What other skills do you have that you'd like to donate?
- What kind of impact do you want to make?
- Do you want to volunteer, or start a referral program that donates money to the nonprofit for every referral you get?

2 Choose a project

Once you've determined the organization and the number of potential volunteers, get in touch. First, ask the organization what they need. Then, explain what you'd like to do. No matter what you can offer, together you'll be able to work out a win-win project for your agency and the nonprofit.

3 Gather the team

Educate them about the organization and why it's important to the community and why you are inspired to get involved. Make sure they know all the details—from the date and time to what they'll be doing, whether they need special skills or specific clothing, etc. If you need more participants, ask family, friends and even clients. It helps to make it an all-in effort. When employees see co-workers, managers and agency owners get involved, they are more likely to get involved as well. It also shows the community that you are all-in on the effort, from the front desk to the corner office.

4 Get to work for your community!

We told you it was easy (and fun).



Involve your clients

Ask a few of your best clients what causes are important to them. Even if you choose another organization for your volunteer efforts, you can pick one or two of your clients' favorites to support throughout the year by donating \$5 for every referral you quote.



Want to make a bigger impact? It's not hard to put together a larger project.

If you have a larger organization, have a lot of people who want to get involved or want to make a bigger impact, you're going to have more planning needs. But don't fret. After choosing your organization and project, these tips, tools and checklists can help you get organized and make a substantial impact!

1 Create a project guide

If you've got a lot of people involved, a project guide can help make sure things run smoothly. Be sure to collaborate with the partner organization to create it, and then send it to every volunteer a couple of weeks before the event. As the project lead, you'll benefit from checklists for planning, the day of and after the volunteer event. Find a full project guide template and checklists in the online handbook.

- Project contacts
- Location and schedule
- Important logistical information
- Project needs and details

2 Communicate with your volunteers

Make sure to stay in touch to keep volunteers informed and motivated. You don't want there to be any surprises when the project gets underway so consider using the customizable templates in the online handbook, which you can easily modify to use on social media as well.

3 Bring the community to community service

Want to make an even bigger impact? If the project allows for it, consider getting more people involved.

- Invite customers, friends and family members.
- Post about the event in your agency newsletter, on social media or add a call to action to your website.
- Alert the local media. If you're heading up a large contingent of volunteers, be sure to share the news (and pictures) with your local media. It can create more awareness of the good cause, and of your agency. Plus, your employees will love sharing the story.

"I've read over the Guide to Community Engagement several times. It has helped us better market our agency and show off our community involvement to help with retention. We worked on a welcome kit that now includes how our involvement has helped the community." —Danielle Shearer, Howard Hanna Insurance Services



Making a difference is a big deal—don't be shy about it.

Sharing the great work your team is doing isn't self-serving. It's showing gratitude for your team and spreading awareness of the nonprofit and its needs.

The key thing to remember is this: You'll be raising awareness for the nonprofit at the same time you're telling the story about your agency's commitment to giving back. And that's a good thing for everyone. First, you've got to get good material. A few tips:



Think ahead about photos and videos

Photos and videos are fantastic ways to interact with your network through social media, in your newsletters and even on your website. Before your volunteer event happens, create a list of photos and videos you want, such as:

- A group photo of agency employees and nonprofit staff
- Before and after photos of the project
- Action shots of agency and nonprofit staff working together
- Video clips of the work, or short interviews with various participants

Get great shots

Designate someone to be the photographer to ensure you get the right photos. You don't need a professional, since most phones are equipped with good cameras. But, make sure to do some test shots before the event starts. Take a variety of candid and posed shots in both landscape and vertical orientations, so you have plenty of options. And remember: save them in the highest resolution!

Participation waivers and image release forms are a must

Volunteers should sign a waiver before participating in your project. This should also include written permission to use their images. This can prevent any problems with sharing the story down the road. Your organization might have their own standard form to complete. Or, you can use the forms in the online resources.



Video gets attention

An interview with the nonprofit about how your agency is helping on Facebook Live or other social medium—and how others can get involved—is a great way to promote both the nonprofit and your work.

Track your community impact

Share milestones, such as hours volunteered, pounds of food collected or donations raised in your newsletter, blog and social network. Your clients will be happy they are supporting these efforts by doing business with you.

Track your business impact

Track the referrals and new business you receive from your volunteer efforts. While not the primary purpose, seeing results for your agency's bottom line can be a powerful incentive to do even more for your community.



Find the story

Now that you've got photos and videos in hand, it's time to craft your story to share with your community. You can write an effective one just by answering a few questions:

1. Why did you choose to support this cause?
2. What is your history of involvement with the nonprofit?
3. What do you and your agency enjoy most about supporting this nonprofit?
4. Who is served by the nonprofit?
5. How does this nonprofit impact you and your community?
6. Is there other important information or are there ways people can get involved?



Where to share your story?

Whether you've written an article for your newsletter, had your event covered by your local paper or posted a photo on Instagram, your story doesn't end there.

If you're a member of a Rotary, Chamber of Commerce, church or other community organization, ask them to publish it in their newsletter, on their social media or website. Don't forget to send it to the nonprofit so they can share with their supporters!



What else can you do?

It takes someone viewing a website less than a second to form an opinion of the business. So it's important to show them that you are doing more than selling policies. If your agency is regularly involved in the community, consider creating a "Community Involvement" page on your website for your posts and photos. This shows your values and that you care about your community while also giving potential clients something to feel good about and relate to. You can even put signs and photos up in your office so every person who comes in sees how your agency is dedicated to making the community stronger.



Create a photo op

For giving projects that don't have a hands-on activity, work with a local print shop to create an oversized check to present to the nonprofit. It makes a great photo to go with your story.



Marketing workshops

Looking for step-by-step guidance on promoting your community involvement? Check out our marketing workshops or the Marketer Development Program. Find out more on the Agent Portal or Safeco Now.

We're ready to help amplify your impact. With up to \$10,000.

Liberty Mutual and Safeco have a rich history of supporting local and national causes on the corporate level, with employee involvement and through programs with agents.

We offer two donation programs that together give away a total of \$375,000 to nonprofits on behalf of agents who volunteer with them. These programs are available for independent agents who represent Liberty Mutual Small Commercial, Safeco Insurance or both. Applications are open several times throughout the year, so apply when it's right for you.



Make More Happen Awards recognize agencies that demonstrate extraordinary community service for a qualifying nonprofit organization focused on education, health and safety, or civic engagement.

How it works:

- Applications are accepted twice a year, and winners earn a \$5,000 donation to their partner nonprofit.
- The team can rally their network to share the story on social media to earn another \$5,000, for a total \$10,000 donation!
- Winning agencies receive a customizable toolkit to promote their award and work with a national public relations firm that will pitch their story to local media.
- Cause areas supported include education, health and safety and civic engagement as well as programs serving youth, low-income families and individuals and people with disabilities.



Change Agents

Change Agents is a reward for agents' volunteer projects of all sizes, because making a difference often comes from small, everyday steps. Agents have five chances to participate throughout the year.

How it works:

- Agents submit a photo with a caption showing their volunteer work with a nonprofit related to the featured cause area.
- Up to 10 agent photos are featured in a photo album; then it's up to the agencies and their partner nonprofits to encourage supporters to vote for their photo.
- Donation awards of \$3,000, \$2,000 and \$1,000 will be made to the first, second and third place entries and all runners up will receive a \$100 donation to the nonprofit.

Plenty of agents give back. These are just a few of their stories.

"Our 'Referrals for a Cause' program raises both money and awareness for nonprofits in our area. For every referral we receive, we donate \$10 to a charity, and use social media to get the word out. Over the last year, we've tried to put more focus on sharing what we're doing with clients and friends. You'd be amazed how much of a difference you can make by just bringing whatever you can to the table."

— Sierra Knight Magee (Knight Magee Insurance, Richmond, Virginia)
2017 Change Agents winner

"We researched organizations in our community to support, and once we found the right fit, we went all-in. Many of our clients, friends and family have seen our charity work and have since gotten involved, both with us and on their own. It feels good to make a difference, meet new people and gain some perspective on our own lives."

— Angie Van Matre (Jeff Van Matre Insurance, Carrollton, Texas)
2018 Make More Happen Award winner

"We don't even have a traditional marketing budget—instead, we invest in educational safety campaigns, giving efforts and providing every McClain Insurance employee with 16 paid hours per year to volunteer. Any company can make a difference, and you don't have to start big, either. Help publicize fundraising events. Recognize others who are giving back. Volunteer and donate what you can, even if it's only a little at first. It still can have a huge impact—on you, your team, and most important, your community."

—Claudia McClain (McClain Insurance Services, Everett, Washington)
2019 Change Agents winner

"The great thing about volunteering is that it doesn't just do a lot of good for the community, it makes you feel amazing, too. The desire to serve isn't really something that can be taught, but it can definitely be learned through experience. Each time you volunteer or contribute, your resolve to give back keeps growing stronger. Ours certainly has."

—Joe Haney (Sterling Insurance Group, Sterling Heights, Michigan)
2018 Change Agents winner



Visit the agent portal or Safeco Now to stay informed about the latest opportunities from Independent Agent Giving. Join our mailing list to receive timely information about deadlines, tips and more.



www.AgentGiving.com



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