

# 2018 CAMPAIGN

## COMPANY COORDINATOR GUIDE



United Way  
of East Central Iowa

# Welcome!

Thank you for joining us as a United Way Company Coordinator! During your campaign, you'll have a chance to make a difference in our community and even experience some benefits yourself:

- Get to know your neighbors
- Bond with coworkers
- Show off your leadership skills
- Meet new people through United Way opportunities and events
- Have some fun along the way!

We know that coming up with ideas and plans can be challenging, whether this is your first contact with United Way or another year in our long partnership. But don't worry—we're here to help!

## Know Your United Way

You can't promote a cause you know nothing about. The more you know about United Way, the more passionate you are and the more credible you will become with coworkers.

### MISSION STATEMENT

Unite the caring power of communities to invest in effective solutions to improve people's lives.

### BRAND CREDO

We fight for the education, financial stability, and health of every person in our community.

### WHO WE ARE

United Way of East Central Iowa (UWECI) is the second largest United Way in Iowa and was one of the first in America. Established in 1914, UWECI originally served four area nonprofits; that number has grown to more than 20 today. Together with our partners, we serve Benton, Cedar, Iowa, Jones, and Linn Counties to help meet the community's most critical needs in education, financial stability, and health.

## What We Do

For more than 100 years, United Way has been a critical partner in strengthening our community's ability to respond to pressing health and human service needs.

United Way's Community Building team is dedicated to breaking the cycle of poverty and creating stronger communities. This means focusing on the building blocks for a better life—education, financial stability, and health. Our goal is to build the House of Well-Being big enough and sturdy enough for all of us to live in.



## HOW DO WE IMPROVE LIVES?

### We build partnerships and networks that help us change community conditions

We are deepening our relationships across sectors and networks. Community Building staff work with more than 300 community partners from business, government, neighborhoods, and the nonprofit sector and participate in many collaborations at the local, state, and national level. Our goal is to build “Boundary Spanning Leadership” teams that can achieve transformative results.<sup>1</sup>

### We assess community needs

Effective solutions emerge from the shared learning of diverse partners. A key element of the Community Building team’s learning has been developing our understanding of our community’s current condition. In fact, we commit significant staff time and other resources to learning more about our region’s demographics, economic condition, and perceptions of our community’s quality of life. We use the reports and studies we produce to help identify funding priorities, emerging needs and growing trends in our community. You can learn more about these trends by visiting [uweci.org/reports](http://uweci.org/reports).

#### 2015 Reports

Community Condition Report  
Condition of Women Report

#### 2016 Reports

Condition of Early Childhood Education  
Condition of Food Security  
Condition of Equity & Well-Being

#### 2017 Reports

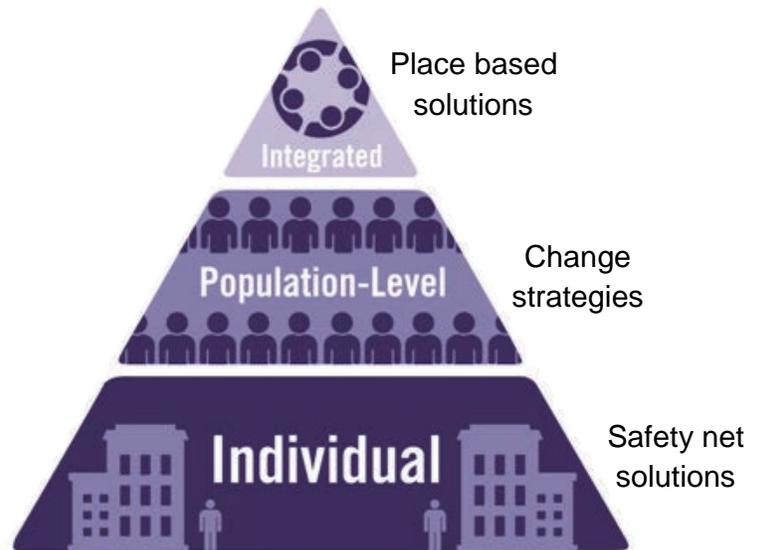
Condition of Women Report  
Condition of Housing Report  
Condition of ACEs  
Condition of Volunteering

#### 2018 Reports

Condition of Mental Health Report  
Condition of Youth Report **(COMING SOON!)**

### We measure and evaluate results

Each focus area has a business plan and a report card to assess our annual progress on key strategies and our overall community goals. The solutions teams, along with staff, review achievement data annually. See our progress on page 4.



## HOW DO WE INVEST COMMUNITY RESOURCES?

United Way’s board first endorsed community goals in 2009. These goals serve to align and focus our work. Our investments include dollars as well as volunteer engagement and advocacy work to achieve the long-lasting community changes we seek.

- We invest in a safety net of services that meet people’s needs now.
- We invest in solutions for whole populations of affected individuals.
- We invest in two-generation, place based, and integrated solutions.

## WE LEVERAGE AND MULTIPLY RESOURCES TO MAXIMIZE OUR IMPACT

- We bring new dollars to the community.
- We engage in public policy work.
- We are stewards of donor dollars.
- We prepare for, respond to, and aid in recovery from disasters in our service area.
- We connect the community to information and services 24/7 and 365 through United Way 2-1-1.
- We bring people together to improve lives and strengthen communities through our volunteer engagement team.

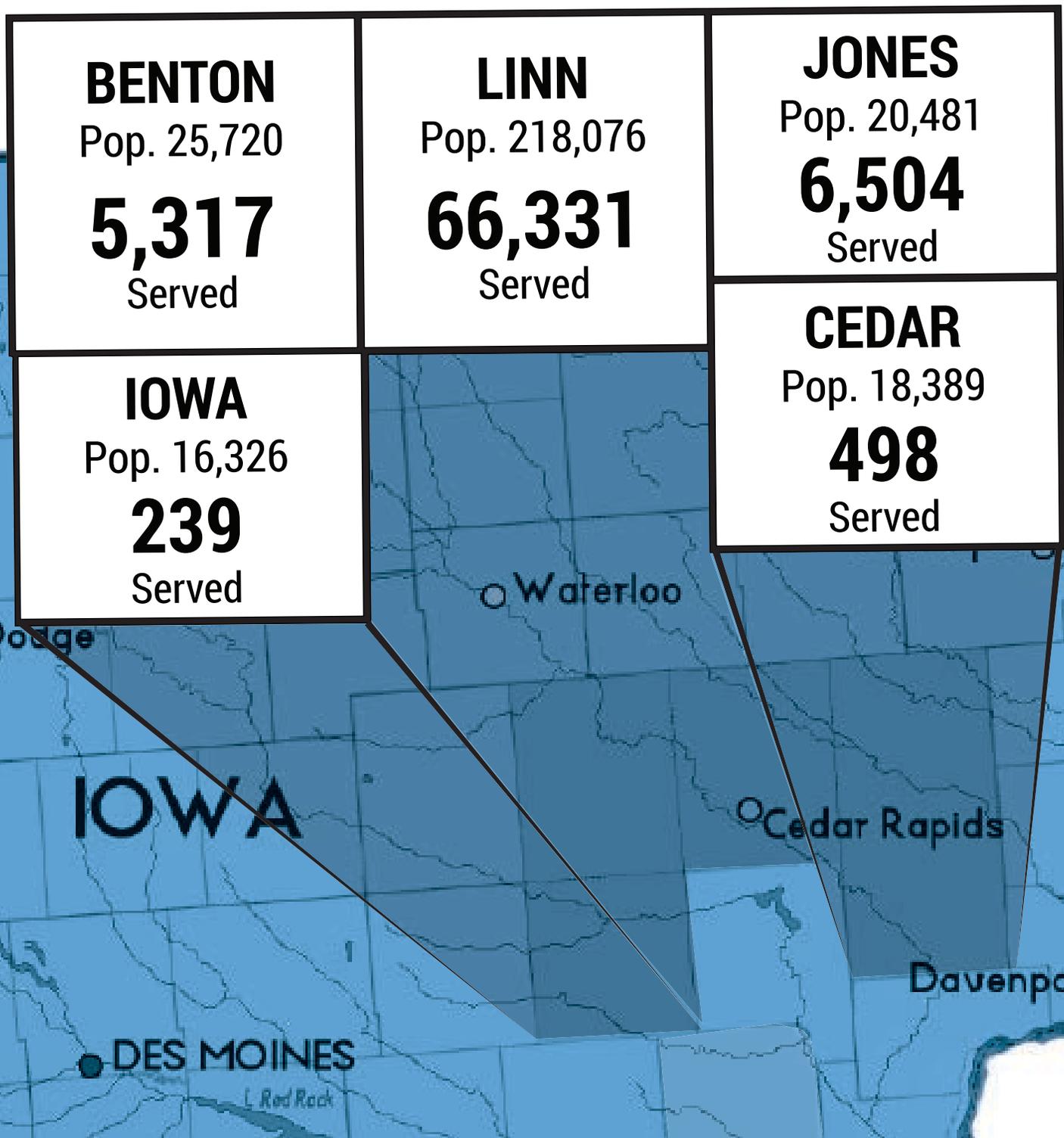
<sup>1</sup>Boundary Spanning Leadership, Earnst and Chrobot-Mason

# Breaking the Cycle of Poverty

By focusing on three building blocks for a better life, we created goals to complete by 2020.

2017 Number of People Served by County of Residence.\*

\*Some clients may be counted twice if multiple services were used.





## Education Goal

By 2020, increase the number of low-income children in our five-county area who are on track academically and developmentally by fourth grade by 30%.



## Financial Stability Goal

By 2020, increase the number of financially stable households by 15%.



## Health Goal

By 2020, improve social connectedness and mental health functioning of low-income adults by 10%.



### SUPPORTING PARENTS:

2,938 parents improved or maintained their parenting knowledge and skills through RED Ahead



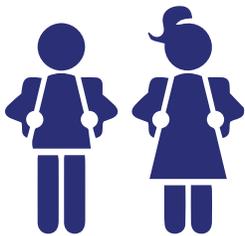
### FREE TAX PREPARATION:

VITA helped low-income residents receive more than \$4.6 million in refunds and credits and save more than \$300,000 in tax preparation fees



### CARE COORDINATION:

1,901 women received navigation/care coordination to improve their health through Women United (formerly WLI) funded programs



### STUDENT ENGAGEMENT:

631 students increased their math or science proficiency (STEM focus)



### STABLE HOUSING:

887 households diverted from shelter or prevented from experiencing homelessness



### RESOURCE CONNECTION:

United Way 2-1-1 received 34,903 calls and 34,403 web searches



### PROGRAMS HELPING IMPROVE CHILDREN'S LITERACY:

Reading into Success, RED Ahead, and Volunteers in Proficiency



### PROGRAMS HELPING FAMILIES MEET BASIC NEEDS AND MOVE TOWARD FINANCIAL STABILITY:

VITA and Kirkwood KPACE



### PROGRAMS PROVIDING HEALTH SERVICES FOR THOSE IN NEED:

Women United and 2-1-1

# Planning Your United Way Campaign

Good planning is key to your campaign's success. A well-organized strategy will make the best use of your time and get your employees excited about your campaign.

Below, you'll find a timeline you can use to map out your road to success. Your United Way staff member will work with you to make a custom timeline so your company and its employees can volunteer, advocate, and give!

## PHASE 1

- Organize a planning committee and start brainstorming ideas with your United Way staff member.
- Start working on specific campaign strategies.
- Schedule employee kickoff meetings, leadership recruitment, and any special events. Talk to employees about United Way and the work we do in the community.
- Set the tone for your campaign by hanging up posters, sending e-blasts, and creating excitement.

## PHASE 2

- Put your campaign strategies to work and reach out to every employee.

## PHASE 3

- Wrap up your campaign and celebrate your success! Thank all employees and share real results about how lives in our community will change.
- Volunteer year-round by participating in Day of Caring, creating an account with Volunteer Now, joining Workplace Volunteer Council, or signing up for a group project.



# Goals & Incentives

Goals help your employees feel like a team and can directly affect your campaign's success. Incentives are a powerful way to encourage people to participate and pledge their support.

Setting realistic and challenging goals is important to ensure your workplace giving campaign is a success.

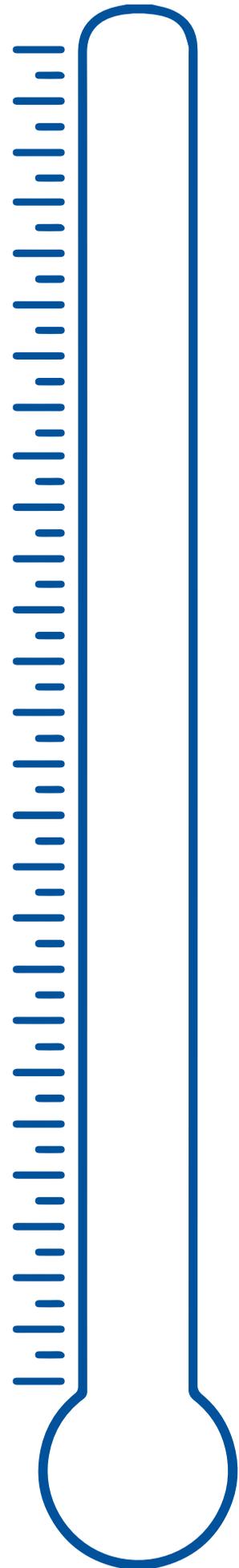
## IF THE AVERAGE EMPLOYEE GIFT IS UNDER \$250:

- **Hold employee kickoff meeting:** Let employees hear firsthand about United Way's work in the community.
- **Encourage payroll deduction:** Most donors will give more if they can spread out their gift throughout the entire year rather than give the whole amount all at once.

Goals don't always have to be a dollar amount. Many companies set goals based on participation. On average, UWECI has 30 local companies that have 100% employee participation. Participants can pledge any amount and still count toward your goal.

## IF YOUR COMPANY PARTICIPATION LEVEL IS LESS THAN 50%:

- Include United Way materials in new-hire and retiree packets. Encourage new hires to fill out their pledge form. Retirees count toward your campaign total, too.
- Email updates during your entire campaign to show the difference their gifts make.
- Teach employees about matching gift dollars. If your company doesn't offer matching gifts, ask your CEO to consider it.



# Campaign Kickoff & Wrap-Up Party

**A campaign kickoff is a perfect way to get people excited for your campaign and let them know about United Way's great work in the community.**

Campaign kickoffs can happen during a regularly scheduled company meeting or at one of our community partners. Your United Way representative can do a fun and informative presentation for as few as two people or as many as 2,000. We are ready and willing to do presentations multiple times to make sure people in all shifts and departments hear about your campaign.

## Campaign kickoff basics

- Your United Way representative
- A story told by a United Way staff member or community partner
- Our campaign video showing why United Way is important to our community

## Making the ask

The number one reason people don't give to United Way is that no one asks them! Our job is to make sure that everyone in the workplace has a chance to give. So how can you ask each person in an effective way?

- The moment a person receives their pledge form, they will decide to give or not within ten seconds. How inspiring can you make that moment?
- Hand out pledge forms after your meeting so each person gets one.
- Ask for a completed pledge form from everyone, even if they choose not to give. That way, you'll know everyone had an opportunity to give.

## Wrap-up parties

Finish your campaign strong with a wrap-up party and thank everyone for their participation. Saying thank you may be the most important part of creating long-term support. Here are a few ways you can thank donors:

- Print half-sheet thank you notes on colored paper
- Have a late afternoon snack for donors
- Send an email or thank you from your CEO
- Reveal your company total in an email or newsletter

In addition, UWECI can thank donors with customized thank you posters to display at your company.



# Hold a Leadership Recognition Event

Did you know leadership donors make up 25% of donors but contribute 60% of our annual campaign dollars? That's why holding a leadership giving campaign is one of the best ways to have a successful campaign. Leadership giving allows your employees to make a great impact on the lives of East Central Iowans and sets your company apart as a leader in our community. Employees can become leadership donors by giving \$250+.

## To start your leadership giving campaign

- Find leadership donors at your company. Your United Way representative can give you a list.
- Work with your United Way representative to figure out the best strategy for your company.
- Have a leadership giving meeting separate from other employee meetings. This could be a recruitment event to boost the number of leadership donors through targeted communication or a recognition event to thank your current leadership donors.

## Sample leadership giving meeting agenda

- CEO attends meeting and supports leadership giving
- Present the benefits of leadership giving and supporting United Way
- Agency or United Way speaker shares story
- United Way representative speaks about work in the community
- Hand out pledge form (and pens) or instructions to give online
- Explain any company incentives for giving
- Ask for investment
- Thank everyone for attending
- After the meeting, collect pledge cards and follow up with those who could not attend

## Other ways to increase leadership giving

- Create new company incentives
- Promote United Way leadership events
- Have current members bring non-leadership donors to United Way leadership events
- Host a gathering for leadership donors outside of campaign time
- Schedule an agency tour so donors can see in person the impact they could make
- Work with United Way staff to create a volunteer project for leadership donors



# Dealing with a Decreased Campaign

Sometimes, you'll have a United Way campaign that will raise less money than other years. There will be circumstances out of your control that affect how much donors give, and that's okay!

## Here are some quick and easy best practices to use if your campaign is struggling:

- Make sure your CEO participates
- Invite a community partner to come in and share how United Way impacts their agency
- Ask employees in person to complete a pledge form
- Offer a prize for completed pledge forms
- Send daily emails about how giving to United Way helps the community
- Host a special event, such as a chili kickoff lunch or time/talent auction
- Volunteer at one of our community partners to see United Way dollars at work
- Ask retirees to give through your company campaign
- Consider sponsoring a United Way event or program

If you need help with your campaign at any time, please reach out to your United Way staff member. We are always available and happy to help!

# UWECI by the Numbers

## ADMINISTRATIVE RATE

United Way of East Central Iowa is a local organization governed by a board of local volunteers. Every August, the board reviews financial information and sets an administrative rate to ensure our organization can successfully achieve its mission of uniting the caring power of communities to achieve effective solutions.

It is important to note that 99 cents of every dollar contributed stays right here in our community. The other penny is paid in association fees to United Way Worldwide and still comes back to benefit our organization through professional development opportunities, information sharing, and assistance with campaigns in large national corporations.

## DONOR DESIGNATION

Donor designation is an option for people to direct their United Way gift. For a minimum gift of \$100, a donor may direct their gift to any 501(c)(3) organization. They will need to fill out a separate form in addition to their pledge form. For multiple designations, donors need to complete a form for each individual designation. UWECI deducts administrative costs and any unpaid pledges from the gift. When a donor designates their gift, the charity receives payments each quarter. These payments go into the charity's general operating budget.

## TAX RECEIPTS

Per IRS regulations, United Way can't issue tax receipts for donors who use payroll deduction. Instead, donors can use their last paystub of the year or their W2. Donors who gave \$250 or more will receive tax receipts in the mail (sent out each January).

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