

# 2020 CAMPAIGN

## COMPANY COORDINATOR GUIDE



United Way  
of East Central Iowa

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## **Abbie could be your neighbor.**

Struggling with debts and addiction, Abbie lost her job, her home, and her children. Abbie didn't know where to start until a friend suggested United Way's resource helpline. The operators were able to connect Abbie to several community resources to help her get clean, pay off her debts, and reunite with her children.

Connecting the dots for people like Abbie is what we do best. We help every person throughout their lives, and treat the root of our community's issues by investing in organizations that fill gaps of need.

**When the people in our community thrive, our community thrives.**



# 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
- Use your leadership skills
- Meet new people through United Way opportunities and events
- Have some fun along the way

We know 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

The more you know about United Way, the more passionate you are and the easier it is to share the message and inspire your 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 nearly 110 years, United Way has been a critical partner in strengthening our community's ability to respond to pressing health and human service needs.**

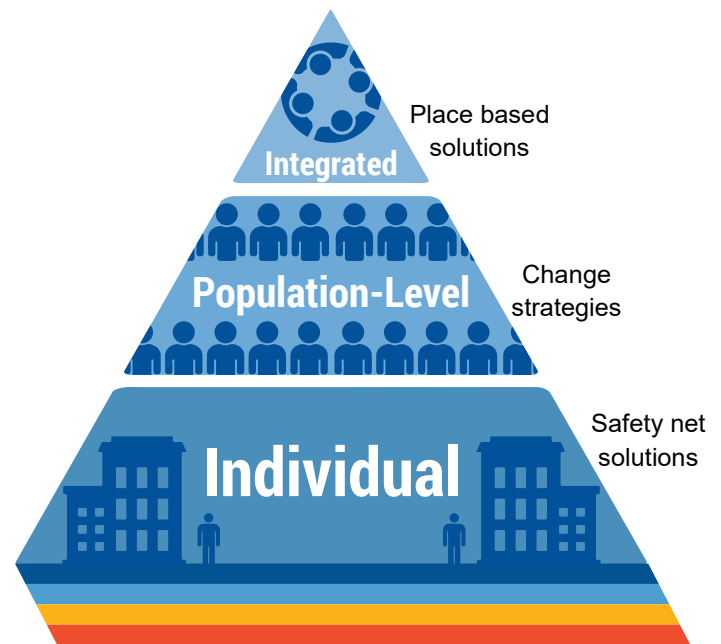
United Way's Community Building team is dedicated to turning the curve of poverty and creating stronger communities. This means focusing on the building blocks for a better life—education, financial stability, and health.

# How Do We Improve Lives?

**We assess community needs.** Effective solutions emerge from the shared learning of diverse partners. Through understanding our community's current condition—demographics, economic condition, and perceptions of quality of life—we identify funding priorities, emerging needs and growth trends. You can learn more about these trends by visiting [uweci.org/reports](http://uweci.org/reports).

**We build partnerships and networks that help us change community conditions.** Through connecting with over 300 community partners and participating in local, state, and national collaborations, we are deepening our relationships in East Central Iowa to help those most in need.

**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. Our volunteers, along with staff, review achievement data annually.



# 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, volunteer engagement, and advocacy work to achieve long-lasting change in our community.**

- 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, and are stewards of donor dollars.
- We engage in public policy work.
- We prepare for, respond to, and aid in recovery from disasters in our service area, particularly with our participation in LAP-AID.
- 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.

# Counties Served

**BENTON COUNTY**

**LINN COUNTY**

**JONES COUNTY**

**IOWA COUNTY**

**CEDAR COUNTY**



## How We Invest

**Volunteers, community organizations, and UWECI staff help us achieve our goals by each playing a supportive role in the community investment process (formerly known as RFP).** Our volunteers—also known as Solutions Teams—are trained to review and assess proposals for funding and make recommendations to guide investment decisions that support our goals. This funding process occurs every three years with 2020 being the first year of the current cycle.

# Who We Invest With

**United Way's funded partners are key in making an impact in our community.** They work to meet people's needs on a day-to-day basis and make a difference in the quality of people's lives. United Way funding goes to specific programs at nonprofits, rather than the nonprofit itself. The following nonprofits receive funding beginning July 2020:

Aging Services, Inc.

Area Substance Abuse Council (ASAC)

Benton County Volunteer Program

Big Brothers Big Sisters of Cedar Rapids and East Central Iowa

Boys and Girls Clubs of the Corridor

Catherine McAuley Center

Community Health Free Clinic

Eastern Iowa Health Center

Foundation 2

Goodwill Industries of the Heartland

Hawkeye Area Community Action Program (HACAP)

Horizons: A Family Service Alliance

Iowa Legal Aid

Jane Boyd Community House

Kids First Law Center

Kids on Course

Rural Employment Alternatives, Inc.

Southeast Linn Community Center

The Arc of East Central Iowa

UnityPoint Health–St. Luke's Dental Health Center

Volunteer Services of Cedar County

Waypoint Services for Women, Children, & Families

Willis Dady Emergency Shelter, Inc.

Youthport

YPN

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

## Before Campaign

- Attend United Way Company Coordinator training.
- Secure CEO/senior management support.
- Determine your participation goal, monetary goal, and incentives.
- Recruit a team to help with campaign; assign tasks.
- Meet with your loaned executive (LE) or UWECI staff to discuss campaign strategies and develop a calendar of events.
- Review the previous campaign's performance, opportunities, and challenges.
- Determine your campaign plan and time frame.
- Schedule your campaign kickoff.
- Schedule any additional special events. Our team is ready to help with creative ideas.
- Distribute the calendar of events.
- Send a campaign kickoff letter from your CEO endorsing the campaign.
- Invite retirees to your kickoff event.

## During Campaign

- Hold kickoff event with loaned executive and agency speaker. If not in person, ask about inventive digital opportunities.
- Distribute pledge forms and campaign materials to all employees. We also have several ways to give electronically
- Hold a leadership giving event.
- Share success stories, community facts, and photos to keep momentum going. We are happy to help you gather information your team is interested in.
- Conduct special events, such as lunch and learns, to boost engagement. Again, we are ready with ideas that might help you do this virtually.
- Monitor progress towards your goal.
- Follow up with individuals who have not returned their pledge forms.
- Send reminders about events, incentives, deadlines, and other important dates.

## After Campaign

- Collect pledge forms.
- Follow up on corporate contributions/employee matches.
- Calculate/review results with your committee members; prepare final report envelope for your LE.
- Announce campaign results to employees.
- Post campaign photos on your corporate social media networks and tag UWECI.
- Evaluate the challenges and successes of your campaign; save notes for next year.
- Thank donors with a celebration event, letter, or email from your CEO and a presentation from a UWECI representative.
- Talk to your loaned executive about how UWECI can continue to improve its service.

## Year-Round

- Keep employees updated on UWECI activities.
- Promote volunteer opportunities.
- Attend UWECI events.
- Share success stories.
- Schedule an agency tour for your employees. We can even make this happen virtually!
- Host a drive to support a specific agency.



# United Way's Community Fund

Giving to United Way's Community Fund is the most powerful way for you to invest in East Central Iowa.

	Community Fund	Designated to Agency
Community needs are addressed and issues are identified	X	
Funding stays local and is based on program performance and overall community impact	X	
Rigorous program oversight is provided by staff	X	
Agencies are visited by United Way staff and volunteers to ensure compliance and progress	X	
Quarterly reviews of financials are conducted	X	
Donate conveniently through workplace campaign and payroll deduction (if available)	X	X
Donation distributed directly to nonprofits	X	X



# Goals & Incentives

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

## SETTING REALISTIC, YET CHALLENGING GOALS IS IMPORTANT TO ENSURE YOUR WORKPLACE GIVING CAMPAIGN IS A SUCCESS.

- **Hold an employee kickoff meeting:** Let employees hear firsthand about United Way's work in the community. Our staff can help you plan this and be an active participant.
- **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 who 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. Worried about what to say, we can help you craft just the right message.
- Teach employees about matching gift dollars. If your company doesn't offer matching gifts, ask your CEO to consider it.

# Talking Points

## Here are some messages you can share when telling the United Way story:

- To have a strong, healthy, vibrant community, we need everyone. From grocery store workers and truck drivers to doctors and sheet metal workers, everyone is part of the equation that makes East Central Iowa the wonderful place it is.
- A donation to United Way is not a short-term investment; it's about creating lasting change. We fight for our neighbors: for those whose voice we don't always hear and whose names we do not know. This pandemic taught us that often times, we do know these faces.
- We target the root causes of issues and respond to immediate basic needs.
- Your support helps our community in incredible ways. Here's how:
  - **Youth in our community are succeeding in school.** Students enrolled in our Volunteers in Proficiency program improved their reading scores by 52 points, which gives them a better chance at graduating high school and life success.
  - **Families are achieving financial stability.** For Tax Year 2018, \$3.8 million were awarded in tax refunds through the Volunteer Income Tax Assistance (VITA) program. VITA ensures every document is filed and those who participate don't miss important tax credits.
  - **People—especially women—have access to healthcare services.** Because of support for programs like Women United, 12,900 un- or under-insured women received healthcare services last year.
- United Way also helps to increase the capacity and efficiency of our partners by connecting them to volunteers, training, and other resources.

# Campaign Kickoff

**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 give presentations multiple times to make sure people in all shifts and departments hear about your campaign.

We know that this year might bring some unique challenges but we are prepared to meet your company where you are with several virtual options available. Reach out to your UWECl contact to find out how to make your kickoff awesome!

## **Campaign kickoff basics**

- Your United Way representative
- A story told by a United Way staff member, community partner, or coworker who benefited from a UWECl funded program or 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 because no one asks them! Our job is to make sure everyone in the workplace has a chance to give. Be sure to:

- Hand out pledge forms after your meeting so each person gets one.
- Make it inspiring! The moment a person receives their pledge form, they will decide to give or not within ten seconds.
- 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 do so.

## **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:

- Write thank you notes
- 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, UWECl can thank donors with customized thank you posters to display at your company. We have also gotten good at creating individualized pop-up thank you events for your staff. Ask how we can help.

# Leadership Recognition Event

## Did you know leadership donors make up 25% of donors but contribute 60% of our annual campaign dollars?

This is 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 or more.

## To start your leadership giving campaign

- Find leadership donors at your company and 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
- 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

## Leadership Societies

- **Alexis de Tocqueville Society:** Donors who give \$10,000+ who desire to create long-lasting, positive change.
- **T.M. Sinclair Society:** Donors who give \$1,250-\$9,999, named after Thomas M'Elderry Sinclair and his belief in teaching children to read and write.
- **William B. Quarton Society:** Donors who give \$500-\$1,249 named after Bill Quarton who championed Cedar Rapids with his philanthropic work.
- **Women United:** Recognizes women who designate \$500+ to provide funding for healthcare services for women in need.
- **Labor Leadership Giving Society:** Recognizes union members who give \$350+.
- **Touch Tomorrow Society:** Recognizes donors who support United Way's Endowment through outright or estate gifts.
- **Young Leaders Society:** Recognizes individuals and couples 40 years or younger who give \$250+.

# Maximizing Your Campaign

**Here are some quick and easy best practices to use year-after-year:**

- 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 consistent emails about how giving to United Way helps the community
- Host a special event, such as a chili kickoff lunch or time and talent auction
- Volunteer at one of our community partners to see your 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

## Where your dollar goes

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 98 cents of every dollar contributed stays right here in our community. The other 2 cents 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.

For donors giving \$10,000 or more, if a minimum of \$2,500 is undesignated, the administrative fee is waived.

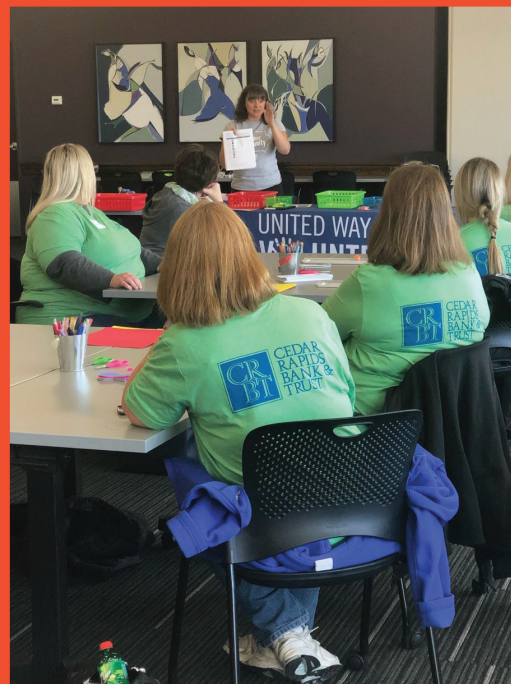
## Tax receipts

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).

## Contact information

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# UWECI Staff Campaign Cabinet

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- Jim Beardsworth, Transamerica
- Lydia Brown, Skogman Realty
- Noreen Bush, Cedar Rapids Community School District
- Kari Cooling, Holmes Murphy – Vice Chair
- Ron Corbett, Cedar Rapids Metro Economic Alliance
- Chris DeWolf, Lil' Drug Store
- Hugh Ekberg, CRST International, Inc.
- Matt Evans, TrueNorth Companies
- Lynn Hartman, Simmons Perrine
- Curt Heideman, US Bank
- Dennis Jordan, Mortenson – Past Chair
- James Klein, Cedar Rapids Bank & Trust - Chair
- Kelly Lind-Daufeldt , US Bank
- Joe Lock, Eastern Iowa Health Center
- Shawn Lueth, Rathje
- Kelley Marchbanks, Advancement Resources
- Rick Moyle, Hawkeye Labor Council AFL-CIO.
- Ann Oleson, Ruffalo Noel Levitz
- Duane Smith, TrueNorth Companies
- Gary Streit, Shuttleworth & Ingersoll PLC
- Dan Theis, OPN Architects, Inc.



**UNITED,  
WE FIGHT.  
UNITED,  
WE THRIVE.**

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United Way  
of East Central Iowa