

**United Way of East Central Iowa**

# **FY21 Board Binder**



**United Way  
of East Central Iowa**

# UWECI Board Binder

## Table of Contents

**Index 1:** Introduction .....

**Index 2:** Board of Directors .....

**Index 3:** Resource Development .....

**Index 4:** Community Building .....

**Index 5:** Finance & Administration .....

**Index 6:** Labor .....

**Index 7:** Marketing & Communications .....

**Index 8:** Appendix .....



United Way  
of East Central Iowa

**INDEX 1**

**INTRODUCTION**

July 1, 2020

Dear Community Volunteer:

Welcome to United Way of East Central Iowa's Board of Directors! Volunteers and donors are the foundation of the work we do in our community. We are grateful you chose our organization as one of your community volunteer commitments.

The dedication individuals like you commit to United Way's board allows it to be one of the most influential and important nonprofit boards in our community. Your talents and expertise can help staff and partner agencies in countless ways. To share your knowledge, we encourage you to participate in one of the board committees. It is the best way to learn about the work United Way does and the role we play in the community. Be sure to ask questions, read all information you receive, and attend as many United Way meetings and events as possible.


In return, it's our hope that your relationship with United Way and your love of East Central Iowa will grow deeper, through opportunities to learn about the nonprofit sector, identify and address community issues, and assist in fundraising efforts that will benefit East Central Iowans.

Thank you for joining us. We look forward to working with you as together we fight for the education, financial stability, and health of every person in our community.

Sincerely,



Kristin Roberts  
President & CEO



Linda Mattes  
Board Chair



# United Way of East Central Iowa

## OUR VISION

United Way of East Central Iowa is the trusted leader and catalyst for envisioning and creating positive community change.

## OUR MISSION

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

## OUR CORE VALUES

- Expect Excellence
- Encourage Growth
- Engage Community
- Exercise Integrity

## OUR CREDO

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



United Way  
of East Central Iowa



United Way  
of East Central Iowa

**FY18-20**

# Strategic Plan

**OUR  
MISSION**  
Break the Cycle  
of Poverty

## STRATEGIC GOALS



Drive Engagement  
that Grows  
Participation



Grow Diverse  
& Sustainable  
Resources



Develop &  
Scale High Impact  
Community Solutions

## STRATEGIC DRIVERS

Compelling Communication  
Digital | Personal | Year Round

Increase Capacity to Maximize Impact  
Collaboration | Technology | Competencies

# UNITED WAY OF EAST CENTRAL IOWA

## HISTORICAL TIMELINE



United Way  
of East Central Iowa

1914

On February 16, 1914, United Way of East Central Iowa began serving the community as a program of the Cedar Rapids Chamber of Commerce called **UNITED CHARITIES CAMPAIGN**. In the first year, the program raised \$21,000 on behalf of four original partner agencies: Home for Aged Women, Sunshine Mission, the YMCA, and YWCA.

1924

United Charities Campaign became the **COMMUNITY CHEST**.

1954

The Community Chest of Cedar Rapids **EXPANDED TO INCLUDE MARION** and raised \$271,405 for 14 local agencies.

1957

The **UNITED FUND OF CEDAR RAPIDS AND MARION** is established and begins partnership with five major employers: Quaker Oats, Link-Belt Speeder, Iowa Manufacturing, Cryovac, and Iowa Steel and Iron Works.

1962

**UNITED COMMUNITY SERVICE (UCS)** and Jay Hess, Executive Director, reorganized into an agency independent from the Chamber of Commerce. He combined the Council on Social Planning into its framework and became county-wide.

**THE FIRST LOANED EXECUTIVES** are asked to join staff during the campaign season. Rockwell Collins and Quaker Oats stepped up to lend a hand.

1969

**PARTNER AGENCIES INCREASED TO MORE THAN 20** thanks to campaign revenues reaching more than \$1 million for the first time.

Joining forces with United Way of America, **UNITED WAY OF LINN COUNTY** was established to join a strong network of nonprofits across the country.

1974

**ANNE TERPSTRA BECOMES THE FIRST WOMAN** to lead the United Way Board.

United Way of Linn County becomes **UNITED WAY OF EAST CENTRAL IOWA (UWECI)** and adds Benton, Cedar, Iowa, and Jones to the counties it serves.

1975

1982

**KATHY LAMB BECOMES FIRST WOMAN** to chair the workplace campaign.

**THE 75TH ANNIVERSARY CAMPAIGN** raises more than \$4 million. It is estimated that nine of ten local people will be touched by a United Way agency in some way during the year.

1987

1989

**66 COMMUNITY HEROES WERE CHOSEN TO CARRY THE OLYMPIC TORCH** as it passes through Iowa en route to the Atlanta Summer Olympics. UWECI organized the nominations process for the state.

UWECI **UNVEILS ITS NEW 2-1-1 HOTLINE**, the largest call center in Iowa. Its purpose is to help connect callers to appropriate community resources 24 hours a day.

1996

2004

To better serve our community, UWECI changes its funding allocation process to a **COMMUNITY IMPACT MODEL**.

Lois Buntz is hired as the **FIRST WOMAN UWECI EXECUTIVE DIRECTOR**.

2008

In response to a devastating flood, UWECI created the **FLOOD RECOVERY FUND** that raised more than \$1 million in donations to help local citizens recover.

In **CELEBRATION OF 100 YEARS** helping the community, UWECI recruits Jack and Matt Evans as campaign chairs, the first father-son team. More than \$11 million is raised thanks to their efforts and UWECI celebrated with more than 25 events during its centennial year.

2014

2016

**TIM STILES IS HIRED AS PRESIDENT & CEO** after Lois Buntz retires from 12 years of service at UWECI.

**UWECI LAUNCHES SPARK\*5 (STRONG PARENTS AND READY KIDS BY AGE FIVE)**, a community-developed initiative to break the multigenerational cycle of poverty.

2017

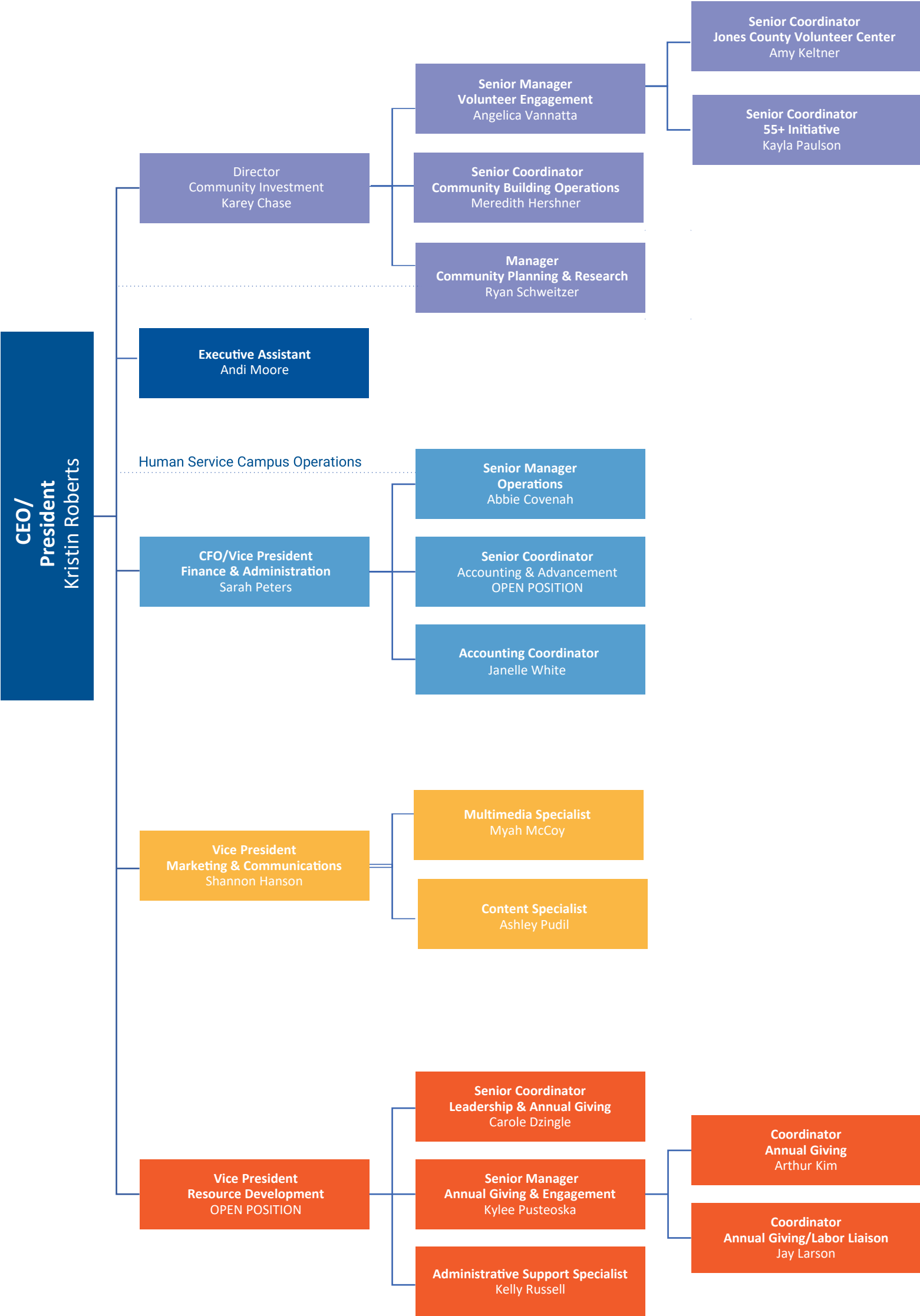
2020

**KRISTIN ROBERTS IS HIRED AS PRESIDENT & CEO** after Tim Stiles steps down from 3 years of service at UWECI.



United Way  
of East Central Iowa

# ORGANIZATIONAL CHART



# **INDEX 2**

## **BOARD OF DIRECTORS**

# UWECI Board of Directors

## FY21 Roster

### Jim Beardsworth

Transamerica  
6400 C St. SW  
Cedar Rapids, IA 52404  
319-355-8686  
jim.beardsworth@transamerica.com

### Kim Becicka

Kirkwood Community College  
6301 Kirkwood Blvd. SW  
Cedar Rapids, IA 52404  
319-398-5525  
kim.becicka@kirkwood.edu

### Sarika Bhakta

Nikeya Diversity Consulting  
955 71<sup>st</sup> St NE  
Cedar Rapids, IA 52402  
319-651-6447  
sbhakta@NikeyaDiversity.com

### Emily Blomme

Foundation 2  
1714 Johnson Ave NW  
Cedar Rapids, IA 52405  
319-362-1170  
eblomme@foundation2.org

### Ray Brown, Secretary

The ESCO Group  
3450 3rd St.  
Marion, IA 52302  
319-739-2211  
raybrown@theescogroup.com

### Keesha Burke-Henderson

Mount Mercy University  
1330 Elmhurst Dr. NE  
Cedar Rapids, IA 52402  
319-363-1323 ext. 1713  
kburke-henderson@mtmercy.edu

### Noreen Bush

Cedar Rapids Community School District  
2500 Edgewood Rd. SW  
Cedar Rapids, IA 52404  
319-558-1981  
nbush@cr.k12.ia.us

### Kari Cooling, Vice Chair

Holmes Murphy  
201 1st St. SE #700  
Cedar Rapids, IA 52401  
800-300-0325  
kcooling@holmesmurphy.com

### Andre Dawson

CRST  
201 1<sup>st</sup> St. SE  
Cedar Rapids, IA 52402  
319-440-0660  
adawson@crst.com

### Patrick Deignan

Community Volunteer  
4024 Majestic Ct NE  
Cedar Rapids, IA 52411  
319-431-7706  
deignanfam@gmail.com

### Mayuri Farlinger

Alliant Energy  
200 1st St. SE  
Cedar Rapids, IA 52401  
319-786-8116  
MayuriFarlinger@alliantenergy.com

### Brian Frese

United Fire Group  
118 2<sup>nd</sup> Ave SE  
Cedar Rapids, IA 52401  
319-399-5255  
bfrese@unitedfiregroup.com

**Teri Gibson**

TrueNorth Companies  
500 1st St. SE  
Cedar Rapids, IA 52401  
319-739-1356  
tgibson@truenorthcompanies.com

**Deb Gertsen**

Cedar Rapids Bank & Trust  
500 1st Ave NE, Ste. 100  
Cedar Rapids, IA 52401  
319-743-71433  
dgertsen@crbt.com

**Britni Gookin**

Crystal Group  
855 Metzger Dr  
Hiawatha, IA 52233  
319-378-1636  
britni.gookin@crystalrugged.com

**Dennis Jordan**

M.A. Mortenson Company  
111 E College St.  
Iowa City, IA 52240  
319-338-2180  
dennis-jordan@uiowa.edu

**Eric Martin**

Transamerica  
6400 C St. SW  
Cedar Rapids, IA 52404  
319-355-2157  
Eric.Martin@transamerica.com

**Kelley Marchbanks**

Advancement Resources  
3349 Southgate Ct. SW  
Cedar Rapids, IA 52404  
319-398-3376  
kmarchbanks@advancementresources.org

**Linda Mattes, Chair**

Alliant Energy  
200 1st St. SE  
Cedar Rapids, IA 52401  
319-786-8116  
lindamattes@alliantenergy.com

**Paul Morf**

Simmons Perrine Moyer Bergman, PLC  
115 3rd St. SE, Ste. 1200  
Cedar Rapids, IA 52401  
319-366-7641  
pmorf@simmonsperrine.com

**Nick Nielsen**

GreatAmerica Financial Services  
625 1st St. SE, Ste. 800  
Cedar Rapids, IA 52401  
319-261-4079  
nnielsen@greatamerica.com

**Michelle Niermann**

UnityPoint Health  
1026 A Ave NE  
Cedar Rapids, IA 52402  
319-665-2219  
Michelle.Niermann@unitypoint.org

**Whitney Pino**

Van Meter  
850 32<sup>nd</sup> Ave SW  
Cedar Rapids, IA 52404  
319-368-2840  
wpino@vanmeterinc.com

**Dan Pulis**

Cargill  
1710 16<sup>th</sup> St. SE  
Cedar Rapids, IA 52403  
319-399-2177  
Dan\_pulis@cargill.com

**Diana Rodriguez**

hibu  
221 3rd Ave SE, Suite 300  
Cedar Rapids, IA 52401  
319-4329225  
diana.rodriguez@hibu.com

**Troy Sauter**

Hawkeye Area Labor Council  
1211 Wiley Blvd SW  
Cedar Rapids, IA 52404  
319-261-4079  
tsauter@iwlw89.com

**Charlie Schimberg**

Schimberg  
1106 Shaver Rd NE  
Cedar Rapids, IA 52402  
319-365-9421  
cschimberg@schimberg.com

**Dave Schreck**

Collins Aerospace  
400 Collins Rd NE  
Cedar Rapids, IA 52498  
319-298-1000  
dave.schreck@rockwellcollins.com

**Mindy Sorg**

OPN Architects  
200 5<sup>th</sup> St. SE, Suite 201  
Cedar Rapids, IA 52401  
319-363-6018  
msorg@opnarchitects.com

**Lisa Stephenson**

CRST International, Inc.  
201 First Street SE, Suite 400  
Cedar Rapids, IA 52401  
319.731.3936  
lstephenson@crst.com

**Nathan Van Genderen, Treasurer**

Mercy Medical Center  
701 10th St. SE  
Cedar Rapids, IA 52403-1292  
319-398-6793  
nvangenderen@mercyare.org

**Melissa Winter**

Community Volunteer  
5580 Hunters Ridge Court  
Marion, IA 52302  
319-533-1315  
melissaawinter@gmail.com



United Way  
of East Central Iowa



# Board of Directors

## FY21 Meeting Schedule

DATE	TIME	LOCATION
August 18, 2020	7:30 a.m.	UWECI, Boardroom
September 15, 2020	7:30 a.m.	UWECI, Rex Eno Conference Room
October 20, 2020	7:30 a.m.	UWECI, Rex Eno Conference Room
November 17, 2020	7:30 a.m.	UWECI, Rex Eno Conference Room
December 15, 2020	7:30 a.m.	UWECI, Boardroom
January 19, 2021	7:30 a.m.	UWECI, Boardroom
February 16, 2021	7:30 a.m.	UWECI, Boardroom
March 16, 2021	7:30 a.m.	UWECI, Boardroom
April 20, 2021	7:30 a.m.	UWECI, Boardroom
May 18, 2021	7:30 a.m.	UWECI, Boardroom
June 15, 2021	7:30 a.m.	UWECI, Boardroom

### Zoom Details

<https://us02web.zoom.us/j/257361221?pwd=am56OFEzaEI5cFBjUm4zMVJIT2Q5UT09>

Password: UWECI1914



United Way  
of East Central Iowa

# Board of Directors

## Statement of Agreement

### Position Summary

Thank you for agreeing to serve on United Way of East Central Iowa's Board of Directors. We are pleased you have chosen United Way as one of your important community commitments. Each Director is chosen because of his or her dedication to United Way, an interest in the community's health and human services needs, a desire to make eastern Iowa a great place to live and work and your position as a senior leader in your company. While we understand you are a busy professional and cannot participate in every United Way function, a Board seat with United Way is one of prestige and importance that will require dedication and commitment on your part.

### Appointment Term

Board members are appointed for three years with a maximum of two consecutive terms, or six years. Board members may return to the Board after a one-year hiatus. Board member terms expire at the end of the fiscal year in June.

The following statement of agreement outlines the key responsibilities of Board members. It is important that you review this document and discuss the expectations with a Nomination committee member or the United Way of East Central Iowa President & CEO.

As a member of United Way of East Central Iowa's Board of Directors I agree to:

1. Understand, support, and contribute to the development of the organization's mission, strategic plan, programs and services;
2. Review and approve organizational policies;
3. Read and understand the organization's financial matters, including audit reports, monthly financial statements, annual budget and investment policies;
4. Serve as a community ambassador for the organization, promoting United Way and its services while introducing community members to the organization;
5. Attend 70% of Board meetings, committee meetings, and Board of Directors planning retreats;
6. Actively serve on at least one committee;
7. Attend United Way of East Central Iowa functions: campaign kickoff, campaign celebrations and key community events;
8. Commit my organization to participate in a United Way workplace campaign;
9. Make a personal leadership gift to United Way annually;
10. Be actively involved in special fundraising events, by hosting, sponsoring or attending;
11. Support actions taken by the Board, even if I hold a minority position, and work cooperatively with staff and Board members;
12. Maintain confidentiality of all Board of Directors meetings;
13. Avoid conflicts of interest and disclose any conflicts that may arise;
14. Adhere to the United Way of East Central Iowa's Code of Ethics;
15. Speak on behalf of the Board when asked to do so by authorized persons;
16. Serve the organization as a whole, rather than special interest groups; and
17. Read materials sent prior to Board meetings and come prepared to engage in the discussion and decision-making process.

### UWECI Responsibilities

1. UWECI will send out request notices of Board meetings, agenda documents and financial statements prior to scheduled meetings;
2. UWECI will possess Directors and Officers Liability Insurance;
3. UWECI will provide education on the role of Board members; and
4. The President/CEO will meet with me on a periodic basis to solicit information about the organization and the role of a Board member.

\_\_\_\_\_  
Signature: UWECI President

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature: Board Member

\_\_\_\_\_  
Date

**AMENDED AND RESTATED  
BYLAWS  
OF  
UNITED WAY OF EAST CENTRAL IOWA, INC.**

**ARTICLE I  
NAME AND PURPOSES OF CORPORATION**

Section 1. Name of Corporation. This Corporation shall be known as United Way of East Central Iowa, Inc. (the "Corporation").

Section 2. Objects and Purposes. The objects and purposes for which the Corporation is formed are those set forth in its Articles of Incorporation as from time to time amended. The Corporation is not formed for pecuniary or financial gain, and no part of the assets, income, profits or net earnings of the Corporation are distributable to or inure to the benefit of any individual or director of the Board, except to the extent permitted under the Revised Iowa Nonprofit Corporation Act (the "Act") and Section 501(c)(3) of the Internal Revenue Code, as amended (the "Code").

**ARTICLE II  
MEMBERSHIP**

The Corporation shall have no members.

**ARTICLE III  
BOARD OF DIRECTORS**

Section 1. General Powers. The affairs of the Corporation shall be managed by its Board of Directors.

Section 2. Number, Tenure and Election.

a. Number. The number of directors shall be not less than twenty (20) and not more than forty (40), excluding Ex Officio Directors. The Board of Directors shall have the authority to designate the total number of directors from time to time by resolution.

b. Term. Each term of a director shall be three (3) years, unless a person is elected to fill the remaining portion of a term for a director who has resigned or been removed. The Board shall specify the date on which a term ends. At the expiration of any term, any director may be re-elected. However, no person shall be eligible to serve as a director for more than six (6) consecutive years unless an individual is serving in a leadership role, as an officer or a committee chair, at the end of their six (6) consecutive years, in which case the Nominations committee may make a recommendation to the

Board and the Board may re-elect that individual director for additional one (1) year terms to allow the person to continue in his or her leadership role. However, no person shall be eligible to serve as a director for more than nine (9) consecutive years. The total number of directors shall be divided into three groups, each with a staggered term so that generally one-third of the positions are filled each year.

c. Election of Directors. The Board of Directors shall elect new directors to fill any vacancies. Election of directors shall be by the majority of the directors present at a meeting at which a quorum is present. The Board of Directors shall appoint a Nominating Committee to nominate a sufficient number of candidates to fill any vacancies. Additional nominations may be made by any director of the Corporation, provided the persons nominated are qualified and have agreed to serve if elected. The Nominating Committee may also be asked to submit, at such time as a vacancy shall occur in the Board of Directors, a nomination to fill that vacancy.

d. Employees of the Corporation. No paid personnel of this Corporation may serve on the Board of Directors, with the exception of the President. The President shall have a right to vote on all matters coming before the Board of Directors, except for issues involving the President's performance review, compensation, benefits package or related matters.

e. Ex Officio Directors. The Board of Directors may also consist of one (1) executive director from an agency funded by the Corporation during the prior funding cycle and approved by the Board of Directors: provided that no agency may have its executive director serve as an ex officio director of the Corporation for more than two (2) consecutive years. The agency executive directors so elected as Ex Officio Directors shall have a right to vote on all matters coming before the Board of Directors except for issues involving funding of agencies by the Corporation.

Section 3. Annual Meeting. The annual meeting of the Board of Directors shall be held at a time designated by the Board during the month of June of each year. At the annual meeting, the Board shall elect new directors, elect officers, appoint persons to the Board of Trustees and conduct such other lawful business as shall come before the meeting. The Annual Campaign Chair and Vice Chair will be elected at the January Board Meeting.

Section 4. Regular and Special Meetings. At least six (6) regular meetings of the Board of Directors shall be held each year. Special meetings of the Board of Directors may be called at anytime by the Board Chair or upon the written request of three directors, which request should be submitted to the Board Chair. The person or persons authorized to call special meetings of the Board of Directors may fix any place as the place for holding any special meeting of the Board of Directors called by them.

Section 5. Notice. Notice of the date, place and time of all meetings of the Board of Directors shall be given to each director at least five (5) days prior thereto by person, mail, electronic mail, telephone, facsimile or other means reasonably anticipated to be received

by the director. Any director may waive notice of any meeting. The attendance of a director at a meeting shall constitute a waiver of notice of such meeting, except where a director attends a meeting for the express purpose of objecting to the transactions of any business because the meeting is not lawfully called or convened. Neither the business to be transacted, nor the purpose of, any regular or special meeting of the Board of Directors need be specified in the notice or waiver of notice of such meeting.

Section 6. Quorum and Manner of Acting. One-third (1/3) of the Board of Directors shall constitute a quorum for the transaction of business at any meeting of the Board of Directors, but if less than a quorum is present at a meeting, a majority of the directors present may adjourn the meeting from time to time without further notice. All directors of the Board, both elected directors and ex-officio directors, shall be entitled to vote on all matters submitted to a vote of the directors of the Corporation, except as noted in Article III, Section 2 (d) and (e), above. The act of the majority of the directors present at a meeting at which a quorum is present shall be the act of the Board of Directors. A director shall be considered present at a meeting of the Board of Directors or of a committee designated by the board if he or she participates in such meeting by conference telephone or similar communications equipment by means of which all persons participating in the meeting can hear each other. Directors may vote by proxy.

Section 7. Vacancies. Any vacancy occurring in the Board of Directors and any directorship to be filled by reason of an increase in the number of directors may be filled by the affirmative vote of a majority of the directors then in office, even if less than a quorum of the Board of Directors. A director filling an un-expired term shall be eligible to serve two (2) full terms after completing the un-expired term of the director's predecessor.

Section 8. Presumption of Assent. A director of the Corporation who is present at a meeting of the Board of Directors at which action on any corporate matter is taken shall be presumed to have assented to the action taken unless his or her dissent shall be entered in the minutes of the meeting or unless he or she shall file his or her written dissent to such action with the person acting as the secretary of the meeting before the adjournment thereof or shall forward such dissent by registered or certified mail to the Secretary of the Corporation immediately after the adjournment of the meeting. Such right to dissent shall not apply to a director who voted in favor of such action.

Section 9. Informal Action by Directors. Any action required to be taken at a meeting of directors, or any action which may be taken at a meeting of directors or of a committee of directors, may be taken without a meeting if a consent in writing setting forth the action so taken, shall be signed by all of the directors or all of the directors of the committee of directors, as the case may be.

Section 10. Absences. If any elected director of the Board is absent for fifty percent (50%) of the meetings within a fiscal year, that fact alone may be considered by the Board of Directors as a resignation. Meetings missed because of illness, or absence from the area may be excused, that is, not counted as absences for the purpose of applying the rule. The Nomination Committee Chair will contact all directors who are absent over fifty percent

(50%) of the time. The Nominations Committee will make recommendations to the Executive Committee regarding a director's tenure on the Board.

Section 11. Committees. The Corporation shall have the Committees designated in these Bylaws and as otherwise determined from time to time by Resolution of the Board of Directors adopted by a majority of the full Board of Directors. Any Committee created by resolution of the Board of Directors may be temporary or permanent and, to the extent permitted by law and these Bylaws shall have such duties, powers and authorities as designated by the Board to the extent not inconsistent with the Act, the Articles or these Bylaws. All Committees shall meet with such frequency as determined by the Chair of such committee or the Chair of the Board of Directors. At any meeting of any committee for which all members were duly notified in advance, one-third of the members shall constitute a quorum.

## **ARTICLE IV**

### **BOARD OF TRUSTEES**

Section 1. Number. The Board of Trustees of the Corporation shall consist of no fewer than twelve (12) individuals. The Board of Directors shall have the authority to designate the total number of Trustees from time to time by resolution.

Section 2. Term. Each Trustee shall be designated as a lifelong Trustee of the Corporation in recognition of outstanding service to the Corporation and the people it serves. There shall be no limit to the number of Trustees of the Corporation. The total number of Trustees shall be divided into three groups. Every third year the President will contact the Trustees to determine their continued interest in serving. A Trustee shall retain such designation for life, unless a Trustee requests such designation to be discontinued. Trustees that request their term to be discontinued will be offered the opportunity to be a Trustee Emeritus.

Section 3. Ex Officio Trustees. The Board Chair, Board Chair Elect and the President of the Corporation shall serve as ex-officio members of the Board of Trustees. The Board Chair shall serve as Chair of the Trustees and the President shall serve as Secretary of the Trustees.

Section 4. Appointment of Trustees. The Board of Directors shall elect the members of the Board of Trustees. The Board of Directors shall direct the Nominating Committee to nominate eligible candidates at the Annual Meeting of the Board of Directors.

Section 5. Eligibility. To be eligible to serve as a Trustee, a candidate should be an individual who:

- a. has served on the Board of Directors for a minimum of three (3) years, or
- b. has served as Board Chair of the Corporation, or
- c. has served as Chair of the Annual Campaign, or

- d. has, in the opinion of the Nominating Committee, provided invaluable service to the Corporation; or
- e. Otherwise, in the opinion of the Nominating Committee, has abilities, experience or expertise, which would be of substantial benefit to the Corporation if the candidate were to serve as a Trustee.

No paid personnel of the Corporation or of any organization receiving financial support from the Corporation is eligible to serve as a Trustee.

Section 6. Interim Vacancies on Board of Trustees. At any time upon the request of the Executive Committee, the Nominating Committee shall nominate candidates to the Board of Trustees to fill a vacancy or vacancies on the Board of Trustees.

Section 7. Duties of Board of Trustees. The Board of Trustees shall serve in an advisory capacity to the Board of Directors as to financial matters, fund raising and community needs and shall assist that Corporation with special projects as assignments are requested by the Board of Directors from time to time.

Section 8. Meetings of Board of Trustees. The Board of Trustees shall meet twice each year at reasonably convenient times upon the request of the Board Chair or the President of the Corporation.

Section 9. Emeritus Membership. The Board of Directors may grant emeritus membership to a former Director or Trustee to recognize his or her long and valuable service to the Corporation. Emeritus Trustees will be ex-officio members of the Board of Trustees, will hold no voting privileges but will receive all Board of Trustees communications from the Corporation and are welcome to attend and speak at any meeting of the Board of Trustees.

## **ARTICLE V** **OFFICERS**

Section 1. Number. The volunteer officers of the Corporation shall consist of a Board Chair and Chief Volunteer Officer, Board Chair Elect, a Chair for each standing committee then authorized by the Board, Secretary and Treasurer, all of who shall be directors of the Board. The President and Chief Executive Officer shall be an employee of the Corporation. The Board of Directors shall elect the officers. Such other volunteer officers and assistant officers as may be deemed necessary may be elected or appointed by the Board of Directors.

Section 2. Election and Term of Office. The volunteer officers of the Corporation to be elected by the Board of Directors shall be elected at the Annual Meeting of the Board of Directors. All volunteer officers shall be chosen from the Board of Directors then constituted. The Nominating Committee shall have the responsibility to place in nomination a slate of volunteer officers prior to the Annual Meeting of the directors. All volunteer



officers shall hold office for a term of one year and until their successors are elected and qualified. No person may serve more than (3) consecutive terms in the same office.

Section 3. Removal. Any officer or agent may be removed by the Board of Directors whenever in its judgment the best interests of the Corporation would be served thereby, but such removal shall be without prejudice to the contract rights, if any, of the person so removed. Election or appointment of an officer or agent shall not of itself create contract rights.

Section 4. Vacancies. A vacancy in any volunteer officer position because of death, resignation, removal, disqualification or otherwise, may be filled by the Board of Directors for the un-expired portion of the term.

Section 5. Board Chair. The Board Chair is the Chief Volunteer Officer of the Corporation and shall preside at all meetings of the Board; shall make recommendations to the Board concerning the formulation and execution of policies of the Corporation; shall supervise matters incident to the general administration of the Corporation's affairs; shall be a member of the Executive committee and serve as Chairperson thereof; and shall be an ex-officio member of all committees. The Board Chair shall also have the powers and perform such other duties as may from time to time be vested in the Chair by the Board of Directors. He or she shall, when present, preside at all meetings of the members and of the Board of Directors. He or she may sign, with the President and Chief Executive Officer or any other proper officer of the Corporation thereunto authorized by the Board of Directors, any deeds, mortgages, bonds, contracts, or other instruments which the Board of Directors has authorized to be executed, except in cases where the signing and execution thereof shall be expressly delegated by the Board of Directors or by these Bylaws to some other officer or agent of the Corporation, or shall be required by law to be otherwise signed or executed; and in general shall perform all duties incident to the office of Board Chair and such other duties as may be prescribed by the Board of Directors from time to time.

Section 6. Board Chair Elect. The Board Chair Elect shall perform such duties as may be assigned from time to time by the Board Chair. In absence of, or inability of the Board Chair to perform his/her duties, the Board Chair Elect shall have all the powers and duties of the Board Chair. The Board Chair Elect may also serve as chair of a standing committee.

Section 7. President and Chief Executive Officer. The President and Chief Executive Officer shall be the chief administrative and executive officer of the Corporation and, subject to the control of the Board of Directors, shall in general supervise and control all of the affairs of the Corporation. The President and Chief Executive Officer shall be responsible to the Board and the Executive Committee for overall operations of the organization. The President and Chief Executive Officer shall be responsible for guiding and developing the program of work of the Corporation and for submitting plans for attainment of suitable objectives to the Board for approval and action. The President and Chief Executive Officer shall be responsible for the development of the annual budget necessary for the attainment of the objectives of the Corporation, which shall be presented

to the Board for its approval. The President may be removed from office and from employment with the Corporation by the Board of Directors.

Section 8. Secretary. The Secretary shall (a keep the minutes of the Corporation and the Board of Directors' meetings in one or more books provided for that purpose; (b see that all notices are duly given in accordance with the provisions of these Bylaws or as required by law; (c be custodian of all corporate records; and (d in general perform all duties incident to the office of Secretary and such other duties as from time to time may be assigned to him or her by the President or by the Board of Directors. The President/CEO shall have custody of the original copy of the Bylaws and all amendments thereof.

Section 9. Treasurer. The Treasurer shall have general charge and supervision over the books and records of the Corporation, and subject to the direction of the Board of Directors, shall have charge over and be responsible for all funds and securities of the Corporation. The Treasurer shall, with the assistance of the staff of the Corporation and the independent accounting firm retained by the Corporation, present financial statements to the Board of Directors annually and shall have the power to disburse funds in accordance with procedures established by the Board of Directors.

Section 10. Other Assistants and Acting Officers. The Board of Directors shall have the power to appoint any person to act as assistant to any officer, or to perform the duties of such officer whenever for any reason it is impracticable for such officer to act personally and such assistant or acting officer so appointed by the Board of Directors shall have the power to perform all the duties of the office to which he or she is so appointed to be assistant, or as to which he or she is so appointed to act, except as such power may be otherwise defined or restricted by the Board of Directors.

## **ARTICLE VI**

### **EXECUTIVE COMMITTEE**

Section 1. Number. The Executive Committee of the Board of Directors shall consist of the officers of the Corporation, Chair of the Nominating Committee, the Chair of such Committees as designated by the Board of Directors from time to time, and up to three other members of the Board who shall be appointed by the Board Chair with the approval of the Board. The Board Chair shall serve as Chairperson.

Section 2. Authority. The Executive Committee, when the Board of Directors is not in session, shall have and may exercise all of the authority of the Board of Directors except to the extent, if any, that such authority shall be limited by the Act or any resolutions of the Board of Directors. The Executive Committee may receive reports and recommendations of program committees for discussion prior to distribution to the Board of Directors. Said reports and recommendations may be referred back to the committee for further consideration or placed on the agenda of the next Board meeting. The Executive Committee shall keep regular minutes and report same to the Board of Directors.

Section 3. Tenure and Qualifications. Subject to the provisions of these Bylaws, each member of the Executive Committee shall hold office until the next regular Annual meeting of the Board of Directors following his or her designation.

Section 4. Meetings. Regular meetings of the Executive Committee may be held without notice at such times and places as the Executive Committee may fix from time to time. Special meetings of the Executive Committee may be called by any individual serving on the Executive Committee upon not less than three (3) day's notice stating the place, date and hour of the meeting, which notice may be written or oral, and if mailed, shall be deemed to be delivered when deposited in the United States mail addressed to the member of the Executive Committee at his or her home address. Any member of the Executive Committee may waive notice of any meeting and no notice of any meeting need be given to any member thereof who attends in person. The notice of a meeting of the Executive Committee need not state the business proposed to be transacted at the meeting.

Section 5. Quorum. A majority of the individuals serving on the Executive Committee shall constitute a quorum for the transaction of business at any meeting thereof and action of the Executive Committee must be authorized by the affirmative vote of a majority of the individuals serving on the Executive Committee.

Section 6. Action Without a Meeting. Any action required or permitted to be taken by the Executive Committee at a meeting may be taken without a meeting if a consent in writing, setting forth the action so taken shall be signed by all of the individuals serving on the Executive Committee via email approval.

Section 7. Vacancies. Any vacancy in the Executive Committee may be filled by a Resolution adopted by a majority of the directors present at a meeting at which a quorum is present.

Section 8. Resignations and Removal. Any individual serving on the Executive Committee may be removed at any time with or without cause by Resolution adopted by a majority of the full Board of Directors. Any of the individuals serving on the Executive Committee may resign from the Executive Committee at any time by giving written notice to the President or Secretary of the Corporation, and unless otherwise specified therein, the acceptance of such resignation shall not be necessary to make it effective.

Section 9. Procedure. The Executive Committee may fix its own rules of procedure, which shall not be inconsistent with these Bylaws. It shall keep regular minutes of its proceedings and report the same to the Board of Directors for its information at the meeting thereof held next after the proceedings shall have been taken.

## **ARTICLE VII**

### **NOMINATING COMMITTEE**

The Board Chair shall appoint, with the approval of the Board, a Nominating Committee of not more than ten (10 or fewer than five (5 persons, a majority of whom shall be directors of the Board. The Board Chair Elect shall be one of the members of the Nominating Committee. The Board Chair shall designate, with approval of the Board, one of the directors of the Board to serve as Chair of the Nominating Committee. It is the responsibility of the Nominating Committee to make nominations for directors at the Annual Meeting of the Corporation. It is the Nominating Committee's further responsibility to make nominations for volunteer officers and the Board of Trustees at the Annual Meeting of the Corporation. The Nominating Committee may also be asked to submit, at such times as vacancies may occur in the Board of Directors or in the Board of Trustees, or among the volunteer officers, nominations to fill those vacancies.

## **ARTICLE VIII**

### **CONTRACTS, LOANS, CHECKS AND DEPOSITS**

Section 1. Contracts. The Board of Directors may authorize any officer or officers, agent or agents, to enter into any contract or execute and deliver any instrument in the name of and on behalf of the Corporation, and such authority may be general or confined to specific instances.

Section 2. Loans. No loans shall be contracted on behalf of the Corporation and no evidences of indebtedness shall be issued in its name unless authorized by a resolution of the Board of Directors. Such authority may be general or confined to specific instances.

Section 3. Checks, Drafts, etc. All checks, drafts or other orders for the payment of money, notes or other evidences of indebtedness issued in the name of the Corporation, shall be signed by such officer or officers, agent or agents of the Corporation and in such manner as shall from time to time be determined by resolution of the Board of Directors.

Section 4. Deposits. All funds of the Corporation not otherwise employed shall be deposited from time to time to the credit of the Corporation in such banks, trust companies or other depositories as the Board of Directors may select.

## **ARTICLE IX**

### **FISCAL YEAR**

The fiscal year of the Corporation shall commence on July 1 of each year and end at midnight on the following June 30.

## **ARTICLE X** **RECORDS**

This Corporation shall keep such permanent books of account and records as shall be sufficient to establish the items of gross income, receipts and disbursements of the Corporation, including, specifically, the donations received. Such books of account and records shall at all reasonable times be open to inspection by the directors of the Board.

## **ARTICLE XI** **OFFICES**

The principal office of the Corporation in the State of Iowa shall be located in the City of Cedar Rapids, Linn County, Iowa. The Corporation may have other offices as the Board of Directors may determine or as the affairs of the Corporation may require.

The Corporation shall maintain in the State of Iowa a registered office, and a registered agent whose office is identical with the registered office, as required by the Act. The registered office may be, but need not be; identical with the principal office in the State of Iowa, and the address of the registered office may be changed from time to time by the Board of Directors.

## **ARTICLE XII** **WAIVER OF NOTICE**

Whenever any notice is required to be given to any director of the Corporation under the provisions of these Bylaws or under the provisions of the Articles of Incorporation or under the provisions of the Act, a waiver thereof in writing signed by the person or persons entitled to such notice, whether before or after the time stated therein, shall be deemed equivalent to the giving of such notice.

## **ARTICLE XIII** **AMENDMENT OF ARTICLES OF INCORPORATION AND BYLAWS**

The Articles of Incorporation may be restated, amended or corrected and new Articles may be adopted by the Board of Directors at any meeting of the Board of Directors by a majority vote of all the directors then serving, provided that written notice of the proposed changes shall be given to each director at least seven (7) days in advance of such meeting.

These Bylaws may be altered, amended or repealed and new Bylaws may be adopted by the Board of Directors at any meeting of the Board of Directors by a majority vote of all the directors then serving, provided that written notice of the proposed changes shall be given to each director at least seven (7) days in advance of such meeting.

## **ARTICLE XIV**

### **POLICIES**

The Corporation, through its officers, Board of Directors, committee members and employees, shall adopt conflict of interest, nondiscriminatory and harassment policies and a code of ethics.

## **ARTICLE XV**

### **INDEMNIFICATION**

Section 1. Determination of Indemnification. To the extent that a party who may be eligible for indemnification by the Corporation has been successful on the merits or otherwise in defense of any action, suit, or proceeding or any claim, issue, or matter therein, such person shall be indemnified against expenses, including attorney fees, actually and reasonably incurred by such person in connection with the action, suit or proceeding. Any other indemnification by the Corporation, unless ordered by a court, shall be made by the corporation only as authorized in the specific case upon a determination that indemnification of the director, officer, employee, volunteer or agent is proper in the circumstances because such person has met the applicable standard of conduct set forth herein. The determination shall be made by a majority vote of all the directors then serving, who were not parties to the action, suit or proceeding, or, if a quorum is not obtainable or, even if obtainable, if a quorum of disinterested directors so directs, or by independent legal counsel in a written opinion selected by disinterested directors. The termination of any action, suit or proceeding by judgment, order, settlement, conviction or upon a plea of nolo contendere or its equivalent shall not of itself create a presumption that the person did not act in good faith and in a manner which such person reasonably believed to be in, or not opposed to, the best interests of the corporation or, with respect to any criminal action or proceeding, that such person had reasonable cause to believe that his or her conduct was unlawful.

The indemnification provisions provided by this Section shall extend to any agents (other than directors, officers, employees or volunteers) of the Corporation as such indemnification may be specifically authorized by resolution of all the directors then serving.

Section 2. Payment of Expenses. Unless otherwise disallowed by the provisions of Section 1, expenses, including attorney fees, incurred in defending a civil or criminal action, suit, or proceeding shall be paid by the corporation in advance of the final disposition of the action, suit, or proceeding as authorized by a disinterested majority of the Board of Directors in the specific case, upon receipt of an undertaking by or on behalf of the director, officer, employee or volunteer to repay such amount unless it shall ultimately be determined that such person is entitled to be indemnified by the Corporation as authorized herein.

Section 3. Non-Exclusive. The indemnification provided shall not be deemed exclusive of any other rights to which those seeking indemnification may be entitled under any applicable statute as amended from time to time, these Bylaws, any agreement or vote of disinterested directors, or otherwise, both as to action in their official capacity and as to action in another capacity while holding office. The indemnification shall continue as to a person who has ceased to be a director, officer, employee or volunteer and shall inure to the benefit of his or her heirs, executors and administrators.

Section 4. Insurance. The Corporation may purchase and maintain insurance on behalf of any person who is or was a director, officer, employee or volunteer of the corporation or is or was serving at the request of the corporation as a director, officer, employee or volunteer of another corporation, partnership, joint venture, trust or other enterprise against any liability asserted against such person and incurred by such person in any such capacity or arising out of such person's status as such, whether or not the corporation would have the power to indemnify such person against such liability under the provisions herein.

Section 5. Intent. It is the express intention of this Article that the indemnification protection afforded the directors, officers, employees and volunteers of the corporation be interpreted to the broadest extent allowed by the Act and otherwise allowed by law, and that this indemnification shall apply to all prior acts of the directors, officers, employees and volunteers of the Corporation and also to all future acts as well.

Approved by the Board of Directors: June 19, 2012

Reviewed: June 24, 2019

# United Way of East Central Iowa

## Code of Ethics

United Way of East Central Iowa has earned the trust and confidence of the public through years of ethical, honest, and responsible charitable service. We believe the continued success of United Way of East Central Iowa depends upon the conduct of its employees, board of directors, board of trustees and volunteers.

Further, we believe United Way of East Central Iowa should be a model for other nonprofit organizations by adhering to the highest ethical standards of performance, professionalism, service to our communities, and ethical conduct. These standards go beyond compliance with laws and regulations.

This code of ethics is adopted as a governing policy for all of our operations and is a way of connecting our values and ideals to the work we do every day.

### **Personal and Professional Integrity**

- We value truthfulness and strive to avoid misrepresentation.
- We strive for fairness and objectivity in our deliberations and decision-making.
- We seek to ensure that confidential or privileged information is used only as intended.
- We strive to be inclusive and embrace diversity in all of our activities.
- We are committed to the concept of equal opportunity for all.
- We respect the dignity of every person with whom we have contact.

### **Organizational Excellence**

- We honor and embrace the partnership of volunteer and staff as we work to advance the mission of United Way of East Central Iowa.
- We strive for operational excellence at United Way and member agencies in recognition that to do less violates our public trust.
- We pledge as volunteers and staff to exercise good stewardship.
- We will not condone coercive or unscrupulous behavior in any of our business dealings with volunteers, staff, donors, member agencies or vendors.
- We pledge to deal with vendors without bias or preferential treatment.
- We pledge to provide a working environment where open communications and diversity of opinions are welcomed and encouraged.
- We strive to encourage growth and personal development for each of our employees.

### **Accountability**

- We pledge to efficiently collect and maintain accurate information regarding all aspects of our operations.



- We pledge to fully disclose all information legally defined as public information and to provide fair and accurate reports on how contributions are used to strengthen our communities.
- We will refrain from using organizational resources for non-United Way purposes.
- We will observe and comply with all laws and regulations affecting United Way.

### **Conflict of Interest** □

- As staff and volunteers we pledge to protect the good name of United Way of East Central Iowa and to avoid any activity that diminishes our mission.
- As volunteers and staff of United Way of East Central Iowa we pledge to disclose our personal interests and when appropriate to refrain from participating in or influencing any decision that would provide a direct personal advantage to us or any member of our family.
- As staff and volunteers we will refrain from influencing the selection of staff, consultants, vendors who are relatives or personal friends or affiliated with, employ or employed by a person with whom they have a relationship that adversely affects the appearance of impartiality.
- As staff, we will ensure that all outside employment and other activities do not adversely affect the performance of their United Way duties.
- As staff and volunteers we pledge not to accept any gratuity or favor in return for duties performed on behalf of United Way from parties that may have benefited materially from our decisions.
- As staff and volunteers we agree to refrain from accepting food, travel, or entertainment that is directly related to United Way of East Central Iowa business decisions.
- As staff and volunteers we agree not to use United Way of East Central Iowa resources to advance material personal or business interests.

### **Solicitations and Voluntary Giving** □

- As staff and volunteers of United Way, we will promote voluntary giving in relationships with donors and vendors.
- As staff and volunteers of United Way, we will refrain from any use of coercion in fundraising activities, including predating professional advancement in response to solicitations.

### **Employment Practices**

- We expect that each employee will be treated with respect, free from verbal or physical harassment.
- We pledge to be an equal opportunity employer that hires on merit and without regard to age, creed, disability, gender, marital status, military status, national origin, race, religion, sexual preference, or other legally protected bases.

**Nepotism** ☐

- United Way of East Central Iowa will not place a person in a staff position where their performance would be managed by a relative (by blood or marriage).
- We will avoid selecting a consultant or vendor who is a relative, close personal friend, employee, or is associated with a relative or close personal friend, based primarily on that relationship.

**Confidentiality and Privacy**

- We will ensure that all information which is confidential, privileged, or nonpublic is not disclosed inappropriately.
- We will respect the privacy rights of all individuals in the performance of their United Way duties.

**Political Contributions**

- We will not make any contributions to any political candidate or public officer or political committee on behalf of United Way.
- We will not use organizational resources, facilities or personnel to endorse or oppose a candidate for public office.
- We will clearly communicate that we are not acting on behalf of the organization, if identified as a representative of United Way, while engaging in political activities in an individual capacity.

**Guidance and Disclosure**

- Volunteers, staff and representatives are encouraged to seek guidance from the Executive Committee and Staff Ethics Officer concerning the interpretation or application of this Code of Ethics.
- The Staff Ethics Officer has been identified as the President/CEO of United Way of East Central Iowa.
- Any known or possible issues of compliance with the Code of Ethics should be disclosed.
- Staff should contact either the Staff Ethics Officer or Executive Committee.
- Volunteers should contact a member of the Executive Committee.

I have read and understand the Code of Ethics of United Way of East Central Iowa.

---

Printed Name

---

Signature

---

Date

# **CONFLICT OF INTEREST POLICY UNITED WAY OF EAST CENTRAL IOWA**

## **ARTICLE I**

### **Purpose**

The purpose of the conflict of interest policy is to protect this tax-exempt organization's (Organization) interest when it is contemplating entering into a transaction or arrangement that might benefit the private interest of an officer or director of the Organization or might result in a possible excess benefit transaction. This policy is intended to supplement but not replace any applicable state and federal laws governing conflict of interest applicable to nonprofit and charitable organizations.

## **ARTICLE II**

### **Definitions**

#### **1. Interested Person**

Any director, principal officer, or member of a committee with governing board delegated powers, who has a direct or indirect financial interest, as defined below, is an interested person.

#### **2. Financial Interest**

A person has a financial interest if the person has, directly or indirectly, through business, investment, close family member or other close personal relationship:

- a. An ownership or investment interest in any entity with which the Organization has a transaction or arrangement,
- b. A compensation arrangement with the Organization or with any entity or individual with which the Organization has a transaction or arrangement, or
- c. A potential ownership or investment interest in, or compensation arrangement with, any entity or individual with which the Organization is negotiating a transaction or arrangement.

Compensation includes direct and indirect remuneration as well as gifts or favors that are not insubstantial.

A financial interest is not necessarily a conflict of interest. Under Article III, Section 2, a person who has a financial interest may have a conflict of interest only if the appropriate governing board or committee decides that a conflict of interest exists.

## **ARTICLE III**

### **Procedures**

#### **1. Duty to Disclose**

In connection with any actual or possible conflict of interest, an interested person must disclose the

existence of the financial interest and be given the opportunity to disclose all material facts to the directors and members of committees with governing board delegated powers considering the proposed transaction or arrangement.

## **2. Determining Whether a Conflict of Interest Exists**

After disclosure of the financial interest and all material facts, and after any discussion with the interested person, he/she shall leave the governing board or committee meeting while the determination of a conflict of interest is discussed and voted upon. The remaining board or committee members shall decide if a conflict of interest exists.

## **3. Procedures for Addressing the Conflict of Interest**

- a. An interested person may make a presentation at the governing board or committee meeting. After the presentation, he/she shall leave the meeting during the discussion of, and the vote on, the transaction or arrangement involving the possible conflict of interest.
- b. The chairperson of the governing board or committee shall, if appropriate, appoint a disinterested person or committee to investigate alternatives to the proposed transaction or arrangement.
- c. After exercising due diligence, the governing board or committee shall determine whether the Organization can obtain with reasonable efforts a more advantageous transaction or arrangement from a person or entity that would not give rise to a conflict of interest.
- d. If a more advantageous transaction or arrangement is not reasonably possible under circumstances not producing a conflict of interest, the governing board or committee shall determine by a majority vote of the disinterested directors whether the transaction or arrangement is in the Organization's best interest, for its own benefit, and whether it is fair and reasonable. In conformity with the above determination it shall make its decision as to whether to enter into the transaction or arrangement.

## **4. Violations of the Conflicts of Interest Policy**

- a. If the governing board or committee has reasonable cause to believe a member has failed to disclose actual or possible conflicts of interest, it shall inform the member of the basis for such belief and afford the member an opportunity to explain the alleged failure to disclose.
- b. If, after hearing the member's response and after making further investigation as warranted by the circumstances, the governing board or committee determines the member has failed to disclose an actual or possible conflict of interest, it shall take appropriate disciplinary and corrective action.

**ARTICLE IV**  
**Records of Proceedings**

The minutes of the governing board and all committees with board delegated powers shall contain:

- a. The names of the persons who disclosed or otherwise were found to have a financial interest in connection with an actual or possible conflict of interest, the nature of the financial interest, any action taken to determine whether a conflict of interest was present, and the governing board's or committee's decision as to whether a conflict of interest in fact existed.
- b. The names of the persons who were present for discussions and votes relating to the transaction or arrangement, the content of the discussion, including any alternatives to the proposed transaction or arrangement, and a record of any votes taken in connection with the proceedings.

**ARTICLE V**  
**Compensation** ☐

- a. A voting member of the governing board who receives compensation, directly or indirectly, from the Organization for services is precluded from voting on matters pertaining to that member's compensation.
- b. A voting member of any committee whose jurisdiction includes compensation matters and who receives compensation, directly or indirectly, from the Organization for services is precluded from voting on matters pertaining to that member's compensation.
- c. No voting member of the governing board or any committee whose jurisdiction includes compensation matters and who receives compensation, directly or indirectly, from the Organization, either individually or collectively, is prohibited from providing information to any committee regarding compensation.

**ARTICLE VI**  
**Annual Statements**

Each director, principal officer and member of a committee with governing board delegated powers shall annually sign a statement which affirms such person:

- a. Has received a copy of the conflict of interest policy,
- b. Has read and understands the policy,
- c. Has agreed to comply with the policy, and
- d. Understands the Organization is charitable and in order to maintain its federal tax exemption it must engage primarily in activities which accomplish one or more of its tax-exempt purposes.

**ARTICLE VII**  
**Periodic Reviews**

To ensure the Organization operates in a manner consistent with charitable purposes and does not engage in activities that could jeopardize its tax-exempt status, periodic reviews shall be conducted. The periodic reviews shall, at a minimum, include the following subjects:

- a. Whether compensation arrangements and benefits are reasonable, based on competent survey information, and the result of arm's length bargaining.
- b. Whether partnerships, joint ventures, and arrangements with management organizations conform to the Organization's written policies, are properly recorded, reflect reasonable investment or payments for goods and services, further charitable purposes, and do not result in inurement, impermissible private benefit or in an excess benefit transaction.

**ARTICLE VIII**  
**Use of Outside Experts**

When conducting the periodic reviews as provided for in Article VII, the Organization may, but need not, use outside advisors. If outside experts are used, their use shall not relieve the governing board of its responsibility for ensuring periodic reviews are conducted.

## United Way of East Central Iowa Conflict Declaration Form

The following organizations are receiving Community Impact Partner funding for a program(s) during FY20. Circle the agencies you have a relationship with and write your role next to the agency name.

1. 2-1-1 / First Call for Help, Iowa
2. Aging Services, Inc.
3. The Arc of East Central Iowa
4. Area Substance Abuse Council (ASAC)
5. Benton County Volunteer Program
6. Big Brothers Big Sisters
7. Boys and Girls Club of Cedar Rapids
8. Catherine McAuley Center
9. Community Health Free Clinic
10. Eastern Iowa Health Center
11. Foundation 2
12. Goodwill Industries of the Heartland
13. Hawkeye Area Community Action Program (HACAP)
14. Horizons, A Family Service Alliance
15. Iowa Legal Aid
16. Jane Boyd Community House
17. Kids First Law Center
18. Kids on Course
19. Rural Employment Alternatives (REA)
20. Tanager Place / YouthPort
21. UnityPoint St. Luke's Foundation – Dental Health Center
22. Waypoint Services
23. Willis Dady Emergency Shelter
24. Young Parents Network (YPN)

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

I have read and understand UWECI's Conflict of Interest Policy and agree to comply with this policy, which includes disclosure of any actual or possible conflicts of interest.

\_\_\_\_\_  
Printed Name

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date



United Way  
of East Central Iowa

# Anti-Harassment Policy

## Purpose and Definition

United Way of East Central Iowa (UWECI) charges all of its employees with upholding its organizational mission to unite the caring power of communities to invest in effective solutions that improve people's lives. In light of this mission, UWECI employees are responsible for upholding the highest standards of ethical and professional behavior in their dealings with the public, volunteers, program participants, stakeholders, and one another. UWECI employees should also keep in mind that, in light of our high profile as a well-recognized nonprofit organization, our conduct and demeanor will be subjected to a high level of scrutiny by members of the public. The public has a right to expect high standards of behavior from those who hold themselves out as working for the common good, and we in turn hold ourselves to high standards of behavior. We believe these standards go beyond mere compliance with laws and regulations and call us to fulfill higher obligations as stewards of public trust.

One of the most basic of our obligations is to treat all of our colleagues with respect and dignity. UWECI is committed to providing a workplace free of sexual harassment (which includes harassment based on gender, gender identity or expression, pregnancy, childbirth, or related medical conditions), as well as harassment based on such factors as race, color, creed, sex, national origin, age, physical disability, mental disability, medical condition, veteran status, or any other basis protected by federal or state laws or otherwise protected under UWECI policy.

UWECI prohibits and will not tolerate harassment of employees by other employees. Similarly, UWECI will not tolerate harassment by its employees of non-employees (such as vendors, suppliers, contractors, or visitors) with whom UWECI employees have a professional relationship. UWECI will not tolerate and will promptly address harassment of its employees by non-employees in the workplace or in any setting in which the employee is performing work for UWECI.

Harassment can take many forms and includes, but is not limited to, sexual harassment. Sexual harassment may be in the form of unwelcome sexual advances, requests for sexual favors, or other verbal or physical conduct of a sexual nature when (1) submission to the conduct, either explicitly or implicitly, becomes a term or condition of employment; (2) submission to or rejection of such conduct by an individual is used as the basis for employment decisions; or (3) the conduct has the purpose or effect unreasonably to interfere with an individual's work performance or creates an intimidating, hostile, or offensive working environment.

Sexual harassment may include a range of subtle and not-so-subtle behaviors and may involve individuals of the same or different gender, sex, gender identity, or gender expression. Sexual harassment may also include harassment that is based on sex, although not sexual or suggestive in nature. Sexual harassment is not limited to the physical workplace itself. It can occur while employees are traveling for business or at employer-sponsored events or parties. Calls, texts, emails, and social media usage by employees directed to others with whom the employee works can constitute workplace harassment, even if they occur away from the workplace premises or not during work hours.



Examples of sexual harassment include, but are not limited to, the following examples:

- *Verbal*: insults, threats, jokes or derogatory comments based on gender, sexual innuendo or suggestive comments, sexual propositions or advances, pressure for sexual favors.
- *Nonverbal*: posting of sexually suggestive or derogatory pictures, cartoons or drawings, making suggestive or insulting noises, leering, whistling, making obscene gestures.
- *Physical*: touching, pinching, squeezing, patting, brushing against the body, impeding or blocking normal work or movement, coercing sexual assault.

Other types of lawfully-prohibited harassment involve verbal, physical, or other conduct because of an individual's membership in a legally-protected group which has the purpose or effect of unreasonably interfering with an individual's work performance or creating an intimidating, hostile, or offensive working environment.

UWECI reminds employees that harassment can take many forms, all of which are unacceptable. Any employee who is found to have engaged in any form of harassment – sexual or otherwise – of another employee, or of a third-party, will be subject to discipline up to and including termination of employment.

### **Reporting and Investigation**

No employee should have to endure harassing conduct, and UWECI has a mechanism by which employees can promptly report any incidents of suspected discrimination or harassment so that UWECI may investigate and take corrective action if warranted. UWECI is only able to investigate and address situations of which it is made aware.

UWECI employees who believe they have witnessed or been subjected to possible harassment or discrimination may report the incident(s), verbally or in writing and including the facts of the incident and the name(s) of the individuals involved, to his or her supervisor or Leadership Team member, Human Resources, or the President. Any UWECI employee who receives a complaint or who observes harassing conduct must promptly inform Human Resources so that an investigation may be initiated. All supervisors are required to immediately report any incident of potentially harassing, discriminatory, or retaliatory conduct of which they become aware. Failure to immediately report such conduct is grounds for discipline up to and including termination of employment.

All complaints (whether verbal or written, and whether made directly to Human Resources or to another supervisor) will be promptly investigated by Human Resources. In the event the subject of the complaint involves a member of the Leadership Team, Human Resources may refer the complaint to an external party for investigation.

The investigator will have the primary responsibility for reviewing any written materials related to the complaint and for determining which witnesses to interview and whether to conduct follow-up interviews. Any employee who is asked to provide information to an investigator reviewing a workplace complaint must cooperate, meaning the employee must attend the interview and give full and truthful information to the investigator. If a complaining employee

refuses to cooperate with a workplace investigation into his or her own complaint, the investigator may draw an inference in favor of the subject of the investigation or otherwise take the complaining employee's refusal to cooperate into account in the course of fact-finding. Refusal to provide information in connection with a workplace investigation, or the falsification or

concealment of evidence in a workplace investigation, may be grounds for discipline up to and including termination of employment.

UWECI understands that many employees who are called to give information in connection with a workplace investigation are concerned about confidentiality. However, UWECI cannot guarantee total confidentiality. The investigator will make efforts throughout the process to treat all evidence presented with discretion and to maintain confidentiality of information to the extent consistent with UWECI's need to conduct a full investigation and take appropriate corrective action, if warranted.

### **Retaliation Prohibited**

Retaliation against anyone reporting or thought to have reported sexual harassment or any harassing behaviors or who is a witness or otherwise is involved in a harassment investigation is prohibited. Acts of suspected retaliation should be reported immediately and will be promptly investigated and addressed in accordance with the investigation procedure outlined above. Such retaliation is a serious violation of the policy and will be investigated. As with other reports made in connection with this policy, cooperation with workplace investigators who are reviewing reports of suspected retaliation is a job requirement. Substantiated complaints of retaliation, like harassment or discrimination, will lead to appropriate corrective action, which can involve disciplinary action up to and including termination of employment.



United Way  
of East Central Iowa

# Statement of Diversity & Inclusion

Diversity and inclusion are critical components to achieving success in an ever-changing environment. UWECI will continually strive to be a model of diversity and inclusion and regularly assess its organizational practices and policies to reflect this commitment.

To value diversity is to respect and appreciate race, religion, skin color, gender, nationality, language differences, sexual orientation, gender identity, physical abilities, mental and developmental disabilities, age, socioeconomic status, work and behavioral styles, parental status, and the perspectives of each individual shaped by their nation, culture and experiences. To be inclusive is to leverage diversity by bringing together unique individual backgrounds to collectively, individually, and more effectively address the issues facing our communities.

Our board, staff, and volunteers must reflect all of the faces, and walks of life which make up our communities. It is our goal, therefore, that United Way of East Central Iowa partners, strategies, and investments reflect these core values. Diversity and inclusion are at the heart of what it means to live united and advance the common good: to be a diverse and inclusive system is fundamental to achieving our mission and goals in education, income, and health. Together, we will genuinely demonstrate and model the principles of diversity and inclusion, which enrich all.



United Way  
of East Central Iowa

# Committee

## Descriptions

### Accountability Review Team

This committee develops and monitors policy to ensure all organizations funded by United Way meet established standards of financial stability, appropriate governance, and sound operational policies and procedures. The committee advises the Solutions Teams regarding any issues within organizations that may not meet standards for financial stability. Reports to the Impact Cabinet. Staffed by the Director of Community Investments. Meets monthly, January–May.

### Agency Executive Advisory Team

The Agency Executive Advisory team provides feedback and information from Partner Agencies to UWEI Community Building staff. The team assists in development of surveys and other information gathering tools. The team assists in planning Council of Agency Executives meetings. Approximately seven members, each of whom represent a funded partner agency. Chaired by Director of Community Investments and an agency executive. The agency chair is also a board member. Meets quarterly.

### Board of Trustees

This Board advises the President/CEO and Board Chair on community, donor, and organizational strategies. They serve as Ambassadors of United Way's mission and vision and assist the President/CEO with recruitment of board members, donors, and other key volunteers. Chaired by the Board of Directors Chair and President/CEO. Meets three times a year.

### Campaign Cabinet

The UWEI Campaign Cabinet is a diverse group of volunteers who represent many professional fields in Linn, Jones, Benton, Iowa and Cedar counties. Members are selected for expertise within their sector, representation of a variety of donor segments, and involvement in the community. Members are goodwill ambassadors for the campaign within their own organizations' campaigns and in the greater community. The campaign cabinet's overall objective is to support UWEI's mission of uniting the caring power of communities to invest in effective solutions that improve people's lives through supporting the work of the annual campaign.

### Community Impact Cabinet

This committee develops and monitors policy related to the achievement of outcomes for the Agenda for Action. The cabinet recommends allocation of funds to each of the impact areas and reviews allocation recommendations from the Impact teams. The members of the Cabinet are chairs of the following teams: Solutions, ART, Public Policy, and Education Advisory. Staffed by the Vice President of Community Building and Cabinet Chair. Meets as needed.

### Council of Agency Executives

Agency Directors that receive funding in key impact areas meet quarterly to discuss shared goals. Agency Directors also receive updates on United Way business. Staffed by the Director of Community Investments and the President/CEO.

### **Education Advisory Team**

This team consults with United Way staff and the Education Advisory Team chair to assist in the development of communitywide strategies to improve the condition of children and youth. They also support and endorse the community goals for education based on their organizational priorities, personal interest and willingness to use their influence and networks to shape policy decisions. Members will serve two-year terms. Chaired by the Director of Community Investments and a Community Volunteer. Meets quarterly.

### **Executive Committee**

The Executive Committee of the Board of Directors develops and monitors policy recommendations. This group acts as the strategic planning committee and works with the CEO in developing the organization's vision and mission. Board committees submit reports and recommendations to the Executive Committee for discussion and approval prior to distribution to the Board of Directors. When the Board is unavailable to act on matters in a timely manner, the Executive Committee may exercise the power of the board subject to any limitations that the Iowa Nonprofit Corporation Act or resolutions of the Board of Directors may impose. Staffed by the President/CEO and the Board Chair. Meets monthly.

### **Finance Committee**

The Finance Committee monitors all financial aspects of the organization including monthly income and expense reports, internal policies, investment performance, and ensures proper filing of all tax and related reports. Other duties include approval and monitoring of the annual operating budget and development of financial policy recommendations. The Finance Committee also has oversight of the agency audit and the completion of the Form 990. Staffed by the CFO/VP of Finance and Administration, CEO, and Board Treasurer/Finance Committee Chair. Meets six times per year and as needed for timely approval of key issues.

### **Jones County Volunteer Center Advisory Committee**

This committee is charged with overseeing the activities and strategies of JCVC. The committee creates awareness of the volunteer programs by promoting and recruiting community volunteers. Members help identify local and regional monetary and grant resources to support the programs. Meets six times a year. Staffed by the JCVC Coordinator.

### **Leadership Society Committee**

This committee is comprised of all the Chairs/Vice Chairs of the Leadership Societies. They develop and monitor strategies to enhance and maximize the amount of money raised in the Annual Campaign. They also assist with prospect identification and donor relationship management. The committee supports the Resource Development staff to increase all fundraising efforts. Staffed by the Vice President of Resource Development. Meets quarterly.

### **Nominations/Board Governance Committee**

This committee annually reviews the composition of the Board of Directors and Board of Trustees and assists in the development of a 3–5 year plan for volunteer leadership. They are responsible for the identification, recruitment, and selection of individuals for membership on the Board of Directors and Trustees, as well as officers of the Board and committee chairs. Members work with the President/CEO in the development and implementation of Board training and orientation. This committee also reviews Board meeting structure and content. Staffed by President/CEO and past Board Chair.

### **Operations & Facilities Committee**

This committee is charged with overseeing the operations, budget, and management of the Human Services Campus and general operational needs of the organization including, but not limited to business continuity planning, security, and risk management. The Sr. Manager, Operations and CFO/VP of Finance and Administration for UWECI serve on this committee and UWECI's board appoints a board member to also serve. Meets quarterly.

### **Planned Giving Committee**

The Planned Giving Committee develops and monitors policies related to Planned Giving and Endowment activities. Advises and consults with the President/CEO regarding recruitment of candidates and integration with other leadership societies. Staffed by the President/CEO and Planned Giving Committee Chair. Meets three - six times per year.

### **Public Policy Committee**

The Public Policy Committee assists the President/CEO and Vice President of Community Building in positioning UWECI as a go-to resource and leader on policy issues related to our priority areas and ensures effective integration of public policy into all UWECI divisions, furthering UWECI's strategic plan. Staffed by the Director of Community Investments. Meets every other month September–May.

### **Resource Management Committee**

The primary functions of the Resources Management Committee are selecting and working with the Portfolio Manager charged with managing UWECI's endowment funds. The committee also oversees the investment of any funds set aside for community impact initiatives. They shall provide periodic reports to the Finance Committee, Planned Giving Committee, and board regarding portfolio performance and other portfolio management matters. Staffed by the CFO/VP of Finance and Administration and chaired by an elected member of the board. Meets twice a year and as needed.

### **Solutions Teams**

These teams set goals and strategic direction for education, financial stability, and health. These teams review requests for proposals from eligible agencies and make allocation recommendations to the Community Impact Cabinet. The committee reviews trends and topical data, refines outcomes and indicators as necessary, and recommends public policy issues to be addressed. The group collects, evaluates, and reports results at the agency program level. Staffed by Community Building Managers and Community Volunteer Chair. Meets monthly.

### **Workplace Volunteer Council Steering Committee**

The primary function of the WVC Steering Committee is to help businesses establish, grow, and sustain successful employee volunteer programs and year-round engagement that positively impacts the community. The steering committee provides strategic guidance and develops programming and opportunities for companies to share best practices in order to create a culture of employee volunteering. Staffed by the Volunteer Engagement Team. Meets bi-monthly.

# Executive Committee

## FY21 Roster

### **Kari Cooling, Vice Chair**

Holmes Murphy  
201 1st St. SE #700  
Cedar Rapids, IA 52401  
800-300-0325  
kcooling@holmesmurphy.com

### **Patrick Deignan**

Community Volunteer  
4024 Majestic Ct NE  
Cedar Rapids, IA 52411  
319-431-7706  
deignanfam@gmail.com

### **Ray Brown**

The ESCO Group  
3450 3rd St.  
Marion, IA 52302  
319-739-2211  
raybrown@theescogroup.com

### **James Klein**

Cedar Rapids Bank and Trust  
500 1st Ave NE, Ste. 100  
Cedar Rapids, IA 52401  
319-743-7143  
jklein@crbt.com

### **Linda Mattes, Chair**

Alliant Energy  
200 1st St. SE  
Cedar Rapids, IA 52401  
319-786-8116  
LindaMattes@alliantenergy.com

### **Nathan Van Genderen**

Mercy Medical Center  
701 10th St. SE  
Cedar Rapids, IA 52403-1292  
319-398-6793  
nvangenderen@mercyare.org



United Way  
of East Central Iowa

# Executive Committee

## FY21 Meeting Schedule

DATE	TIME	LOCATION
August 11, 2020	12:00 p.m.	UWECI, Front Conference Room
September 8, 2020	12:00 p.m.	UWECI, Front Conference Room
October 13, 2020	12:00 p.m.	UWECI, Front Conference Room
November 10, 2020	12:00 p.m.	UWECI, Front Conference Room
December 8, 2020	12:00 p.m.	UWECI, Front Conference Room
January 12, 2021	12:00 p.m.	UWECI, Front Conference Room
February 9, 2021	12:00 p.m.	UWECI, Front Conference Room
March 9, 2021	12:00 p.m.	UWECI, Front Conference Room
April 13, 2021	12:00 p.m.	UWECI, Front Conference Room
May 11, 2021	12:00 p.m.	UWECI, Front Conference Room
June 8, 2021	12:00 p.m.	UWECI, Front Conference Room

Zoom Information –

<https://us02web.zoom.us/j/170604743?pwd=VDJMK0Jhc2pLRW11VGVqWmswQUFKQT09>

Password: UWECI1914



# Board of Trustees

## FY21 Roster

### Jon Bancks

Morgan Stanley  
600 3rd Ave NE, Ste. 100  
Cedar Rapids, IA 52401  
319-743-6073  
jon.bancks@mchsi.com

### Tim Charles

Mercy Medical Center  
701 10<sup>th</sup> St. SE  
Cedar Rapids, IA 52403  
319-398-6697  
tcharles@mercyCare.org

### Terri Christoffersen

Community Volunteer  
3187 Feather Ridge Rd.  
Toddville, IA 52341  
319-832-2121  
terri3187@msn.com

### Loren Coppock

TrueNorth Companies  
500 1<sup>st</sup> St. SE  
Cedar Rapids, IA 52401  
319-739-1307  
lcoppock@truenorthcompanies.com

### Jack Cosgrove

Community Volunteer  
4114 Hickory Hill Ln. SE  
Cedar Rapids, IA 52403-3741  
319-365-4485  
Jack834@mchsi.com

### John Dorfler

Wells Fargo  
150 1<sup>st</sup> Ave NE  
Cedar Rapids, IA 52401  
319-368-1185  
John.a.dorfler@wellsfargo.com

### Kathy Eno

Community Volunteer  
365 Abbotsford Rd. SE  
Cedar Rapids, IA 52403  
319-377-2929  
Keenollc123@gmail.com

### Rex Eno

Community Volunteer  
365 Abbotsford Rd. SE  
Cedar Rapids, IA 52403  
319-377-2929  
rexeno@yahoo.com

### Jack Evans

The Hall-Perrine Foundation  
115 3<sup>rd</sup> St SE, Ste.803  
Cedar Rapids, IA 52401  
319-866-6532  
jackevans@hallperrine.org

### Jim Haddad

Haddad Consulting Services  
7506 Hampshire Dr. NE  
Cedar Rapids IA 52402  
319-377-8367  
hawk79@mchsi.com

### Brad Hart

Bradley & Riley  
2007 1<sup>st</sup> Ave SE  
Cedar Rapids, IA 52402  
319-861-8736  
bhart@bradleyriley.com

### Larry Helling

Cedar Rapids Bank and Trust  
500 1<sup>st</sup> Ave NE, Ste. 100  
Cedar Rapids, IA 52401  
319-862-2728  
lhelling@crbt.com

**Jared Hills**

Divine Engineering  
5440 6<sup>th</sup> St. SW  
Cedar Rapids, IA 52404-4814  
319-365-0564  
jaredhills@divineeng.com

**Jim Hoffman**

Community Volunteer  
325 Innes Way SE  
Cedar Rapids, IA 52403  
319-373-3883  
jimhoffman@dybb.com

**Phil Jasper**

Collins Aerospace  
400 Collins Rd NE  
Cedar Rapids, IA 52498  
319-295-1000  
phil.jasper@rockwellcollins.com

**Dick Johnson**

Community Volunteer  
4821 Lakewood Dr.  
Cedar Rapids, IA 52411  
319-294-4346  
kickjackie@msn.com

**Frank Kintzle**

Principal Financial  
200 2<sup>nd</sup> Ave SE  
Cedar Rapids, IA 52401  
319-362-2149  
kintzle.frank@principal.com

**Barbara Knapp**

Community Volunteer  
307 Crescent St. SE  
Cedar Rapids, IA 52403  
319-366-4908  
bknapp@mchsi.com

**James Klein**

Cedar Rapids Bank and Trust  
500 1<sup>st</sup> Ave NE, Ste. 100  
Cedar Rapids, IA 52401  
319-743-7143  
jklein@crbt.com

**Kevin Knutson**

Holmes Murphy & Associates  
500 1<sup>st</sup> Ave NE, Ste. 300  
Cedar Rapids, IA 52401  
319-896-7707  
kknutson@holmesmurphy.com

**Chris Lindell**

Guaranty Bank & Trust  
302 3<sup>rd</sup> Ave SE  
Cedar Rapids, IA 52401  
319-286-6200  
clindell@guaranty-bank.com

**Ann Lipsky**

Cedar River Finance  
3500 Cottage Grove Ave SE  
Cedar Rapids, IA 52403  
319-362-2181  
aml@smulekoffs.com

**Linda Mattes, Chair**

Alliant Energy  
200 1st St. SE  
Cedar Rapids, IA 52401  
319-786-8116  
lindamattes@alliantenergy.com

**Susan McDermott**

Community Volunteer  
2012 Blake Blvd. SE  
Cedar Rapids, IA 52403  
319-363-6956  
michaelo.susanw@gmail.com

**Greg Neumeyer**

Community Volunteer  
1685 Mackenzie Dr.  
Cedar Rapids, IA 52411  
319-395-7024  
gdneumeyer@gmail.com

**Ron Olson**

Community Volunteer  
4019 Windham Wood Ct. SE  
Cedar Rapids, IA 52403  
319-360-1664  
rolson@paulsonelectric.com

**Rue Patel**

Community Volunteer  
1705 Maple St.  
Robins, IA 52328  
319-389-5366  
Rue.patel@genmills.com

**Chuck Peters**

The Gazette Company  
P.O. Box 511  
Cedar Rapids, IA 52406  
319-368-8878  
chuck.peters@gazcomm.com

**Mary Quass**

NRG Media LLC  
2875 Mr. Vernon Rd. SE  
Cedar Rapids, IA 52403  
319-398-8102  
mquass@nrgmedia.com

**Kyle Skogman**

Skogman Companies  
411 1<sup>st</sup> Ave SE, Ste. 410  
Cedar Rapids, IA 52401  
319-363-8285  
kskogman@skogman.com

**John Wasta**

Tallgrass Business Resources  
1239 1<sup>st</sup> Ave SE  
Cedar Rapids, IA 52402  
319-364-8148 x.308  
jwasta@tallgrassbiz.com

**EMERTI BOARD MEMBERS****Bob Allsop**

Community Volunteer  
2115 1<sup>st</sup> Ave SE, Unit 3206  
Cedar Rapids, IA 52402  
319-363-1606  
rwallsop@aol.com

**Lee Clancey**

Community Volunteer  
2222 1<sup>st</sup> Ave NE, Unit 106  
Cedar Rapids, IA 52403  
319-365-7141  
leeclancey@gmail.com

**John Smith**

CRST International  
3930 16<sup>th</sup> Ave SW  
Cedar Rapids, IA 52404  
319-396-4400  
jsmith@crst.com

**Mick Starcevich**

Community Volunteer  
418 Prairie View Dr  
Fairfax, IA 52228  
319-533-5771  
mick.starcevich@kirkwood.edu

**Gary Streit**

Shuttleworth & Ingersoll  
115 3<sup>rd</sup> St. SE, Ste. 500  
Cedar Rapids, IA 52401  
319-365-9461 ext. 2316  
gjs@shuttleworth.com

**Dan Thies**

OPN Architects, Inc.  
200 5<sup>th</sup> Ave SE, Ste. 201  
Cedar Rapids, IA 52401-1810  
319-363-6018  
dthies@opnarchitects.com

**Sandi Cobb**

Community Volunteer  
3530 Heatheridge Dr. NE  
Cedar Rapids, IA 52402  
319-365-4513  
sandi.k.cobb@gmail.com

**Steve Dummermuth Sr.**

IGD Industries, Inc.  
P.O. Box 122  
Cedar Rapids, IA 52406-0122  
319-396-2222  
sft@aspensupport.com

**Joe Hladky**

The Gazette Company  
14751 Headwater Bay Ln.  
Fort Meyers, FL 33908  
319-360-0510  
joe.hladky@gazcomm.com

**Nancy Kasperek**

Community Volunteer  
2910 Indian Hill Rd.  
Cedar Rapids, IA 52403  
319-447-9909  
njkasperek@yahoo.com

**Robert Kucharski**

Community Voluntrer  
19045 Thompson Dr., Unit 304  
Brookfield, WI 53045  
319-210-0098  
rjkucharski@wi.rr.com

**David Miller**

Community Volunteer  
10269 Sago Palm Way  
Fort Meyers, FL 33966-6430  
319-265-0568  
degmiller@comcast.net

**Iris Muchmore**

The Hall-Perrine Foundation  
115 3<sup>rd</sup> St SE, Ste. 803  
Cedar Rapids, IA 52401  
319-362-9079  
lmuchmore1974@gmail.com

**John Rife**

McIntyre Foundation  
210 Candlestick Dr. NE  
Mt. Vernon, IA 52314-1577  
319-895-6357  
jtbr2@q.com

**IN MEMORIAM****Joe Schimberg**

Schimberg Company



United Way  
of East Central Iowa

# What are the fundamental roles of a nonprofit board?

**“My greatest concern is that our board gets too involved in administration.”**

Discovering a clear role brings energy and freedom to individuals as well as organizations. If you could observe the board meeting of 100 nonprofit groups, as we have, you would be struck by their diversity. Boards can range in size from three to more than 50 people. Their structure, strength of leadership, working style, and relationship with staff varies almost as much.

Just as boards themselves are inherently diverse, so are the assumptions individual board members bring to the group. For this reason, a shared understanding of the roles of a nonprofit board is essential to effective governance. One of the best lists of board functions is found in *Ten Basic Responsibilities of Nonprofit Boards*, published by the National Center for Nonprofit Boards. Use these ten functions as a checklist for clarifying your board's role:

1. Determine the organization's mission and purpose.
2. Select the chief executive.
3. Support the chief executive and assess his or her performance.
4. Ensure effective organizational planning.
5. Ensure adequate resources.
6. Manage resources effectively.
7. Determine, monitor, and strengthen the organization's programs and services.
8. Enhance the organization's public standing.
9. Ensure legal and ethical integrity and maintain accountability.
10. Recruit and orient new board members and assess board performance.

Does the board delegate each function being carried out in your organization, either by the full board or by the chief executive as? Does your board do more? If so, does its expanded role make sense?

Here is another framework for clarifying role definitions. Think of each board member as having three hats to wear:

1. **Governance hat:** Worn only when the full board meets, proper notice has been given, and a quorum is present.
2. **Implementation hat:** Worn only when the board gives one or more board members authority to implement a board policy.
3. **Volunteer hat:** Worn at all other times, when board members are involved with organizational activities as volunteers.

Problems arise when board members and/or staff confuse these hats or when board members assume the *individual* and *collective* board responsibilities are interchangeable. They are not. Much of the confusion has to do with authority. Here is how we distinguish the three hats for individual board members.

- **Governance hat.** The board is the ultimate legal and moral authority for the nonprofit corporation. The government authorizes the board to be accountable to the public for running the corporation. An *individual* board member has no authority in governance. Governance is *group* action.
- **Implementation hat.** Occasionally the board delegates at least one of its members to act on behalf----to negotiate the purchase of a van, for example, or to

determine which firm will do the next financial audit. Such authority is not automatic just because a person is a board member. It depends on the board's having given its authority, acting by resolution in an official meeting.

- **Volunteer hat.** As a volunteer, a board member has no individual authority simply by virtue of his or her position. When wearing a volunteer hat, the board member is accountable to another person, whether the chief executive, the volunteer coordinator, another staff member, or a task force chairman.

The most misunderstood and abused principle of governance is the requirement for group action. The chief executive and staff cannot serve two (or 22) masters. The full board sets policy, not individual board members who feel strongly about something and voice their opinions to the chief executive. Board members must be taught this principle, and staff must be reminded of it. Otherwise, confusion and conflict reign and board effectiveness is diminished.

In most organizations, the board looks to the staff to implement its policy determinations. Board members expect the staff to act within policy limitations, and they simply want reports on how policy is being carried out. The same standard applies to implementation tasks that the board assigns to one or more of its members. Those board members then put on their implementation hats and fulfill the task according to board policy. They do not attempt to revise policy or create a new one.

Small nonprofit organizations with few staff are fortunate to have board members who can jump in and help with details. Most depend heavily on board members to set up luncheons, enlist volunteers, raise funds, help stuff envelopes, put up banners, write newsletter articles, and more. But in this role, board members are volunteering to help the chief executive and staff complete tasks that fulfill the organization's mission. During these volunteer hours, board

members must not try to run the program simply because they are board members.

The concept of these three hats—governance, implementation, and volunteer—is not understood automatically. The board needs to discuss how its roles differ from those of the staff, agree on a model that fits the organization, and orient both board and staff to their distinctive roles. Then the board is much less likely to become involved inappropriately in administration.

1. Determine where you are. Give each board member a blank sheet of paper and ask each to write what she or he believes the role of the board to be. Consolidate the responses in a summary report for discussion at the next meeting. Try to reach consensus on what will work best.
2. Ask a friendly but knowledgeable and objective volunteer to read the board's minutes from the past year and then observe two board meetings. Ask this person to summarize on one page what the board role is (not what someone says it *should* be). You'll find out quickly whether or not you are walking the talk.

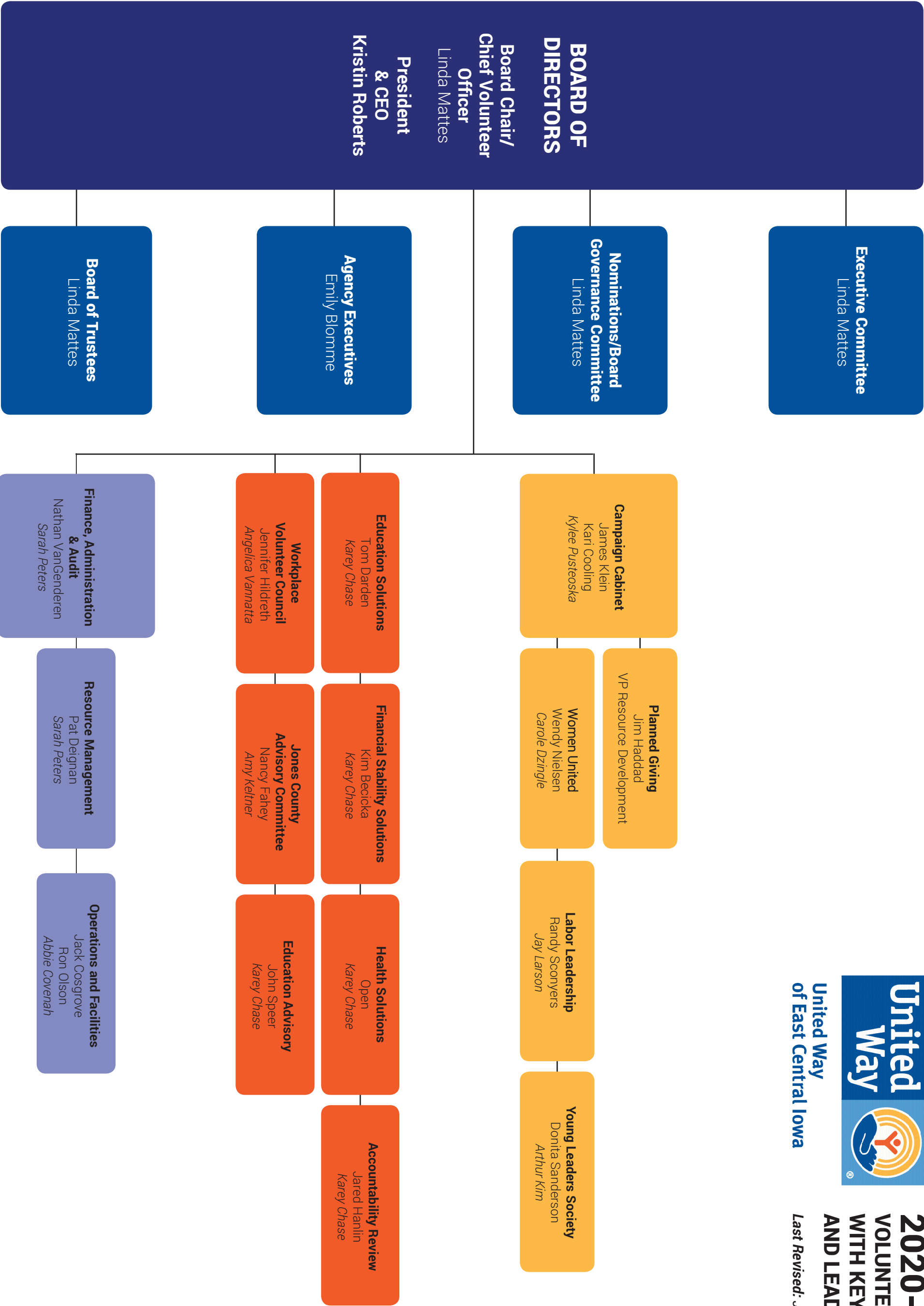
<sup>1</sup> Richard T. Ingram, *Ten Basic Responsibilities of Nonprofit Boards*, rev. ed. (Washington, DC: National Center for Nonprofit Boards, 1997).



United Way  
of East Central Iowa

2020-21  
VOLUNTEER ORGANIZATION  
WITH KEY VOLUNTEERS  
AND LEAD STAFF

Last Revised: July 15, 2020



# **INDEX 3**

## **RESOURCE DEVELOPMENT**



# Resource Development

## Fact Sheet

### Purpose of Resource Development

United Way is a community impact organization, with fundraising as a core component for the implementation of the United Way business model.

### Key Activities of Resource Development

#### Annual Workplace Campaign

The United Way Workplace Campaign reaches over 13,000 donors which includes employees from 400+ area businesses. It provides an opportunity for individuals to donate, volunteer and/or speak out for causes that matter to them. It is the cornerstone of the United Way model, bringing together employers, employees and United Way. Campaign season typically runs from August through November. It serves as one component of a year-round relationship with many corporate partners, foundations, and individuals. The workplace campaign helps to build loyalty and affinity with United Way at both the individual donor and corporate level.

#### Other Resources

Sponsorships, grants, direct mail, special events and individual donor solicitation are all a part of the annual fundraising efforts.

#### Planned Giving

This is a long-term cultivation effort encouraging donors to make a gift to UWECL's endowment, which is invested with Baird and the Greater Cedar Rapids Community Foundation. Individuals may also endow their annual giving through a Named Endowed Designation (NED) held at the community foundation. Annual distribution from a NED is applied toward a donor's annual gift.

#### Leadership Giving

These societies provide additional recognition for individuals and couples who personally contribute at levels listed below:

- Alexis de Tocqueville Society: \$10,000+
  - La Société Nationale: \$100,000+
  - Ordre de Fraternité: \$75,000–99,999
  - Ordre d'Égalité: \$50,000–74,999
  - Ordre de Liberté: \$25,000–\$49,999
  - Membres de la Société: \$10,000–24,999
- T.M. Sinclair Society: \$1,250–9,999
  - Keystone: \$7,500–9,999
  - Pillar: \$5,000–7,499
  - Cornerstone: \$2,500–4,999
  - Builder: \$1,250–2,499
- William B. Quarton Society: \$500–1,249
- Women United: Donors who designate \$500+ to Women United
- Labor Leadership Giving Society: Union members who give \$350+
- Young Leaders Society: Donors 40 years or younger who give \$250+
- Diamond Donor Club: Donors who give for 25+ years

- Touch Tomorrow Society: Donors who support the endowment with outright or estate gifts
- Whipple Legacy Circle: Individuals who endow their annual leadership gift

## 2020 Volunteer and Staff Leadership

### Annual Campaign Cabinet

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

### Affinity Groups

Women United  
Young Leaders Society  
Labor Leadership

### Chairs

Wendy Nielsen, CRBT  
Donita Sanderson, Schimberg Company  
Randy Sconyers, Sheet Metal Workers 263

### Planned Giving

Jim Haddad, Haddad Consulting Services

### Resource Development Department

Sr. Manager, Annual Giving & Engagement  
Sr. Coordinator, Leadership & Annual Giving  
Coordinator, Annual Giving  
Coordinator, Annual Giving/AFL-CIO Labor Liaison  
Administrative Support Specialist

### Staff

Kylee Pusteoska  
Carole Dzingle  
Arthur Kim  
Jay Larson  
Kelly Russell

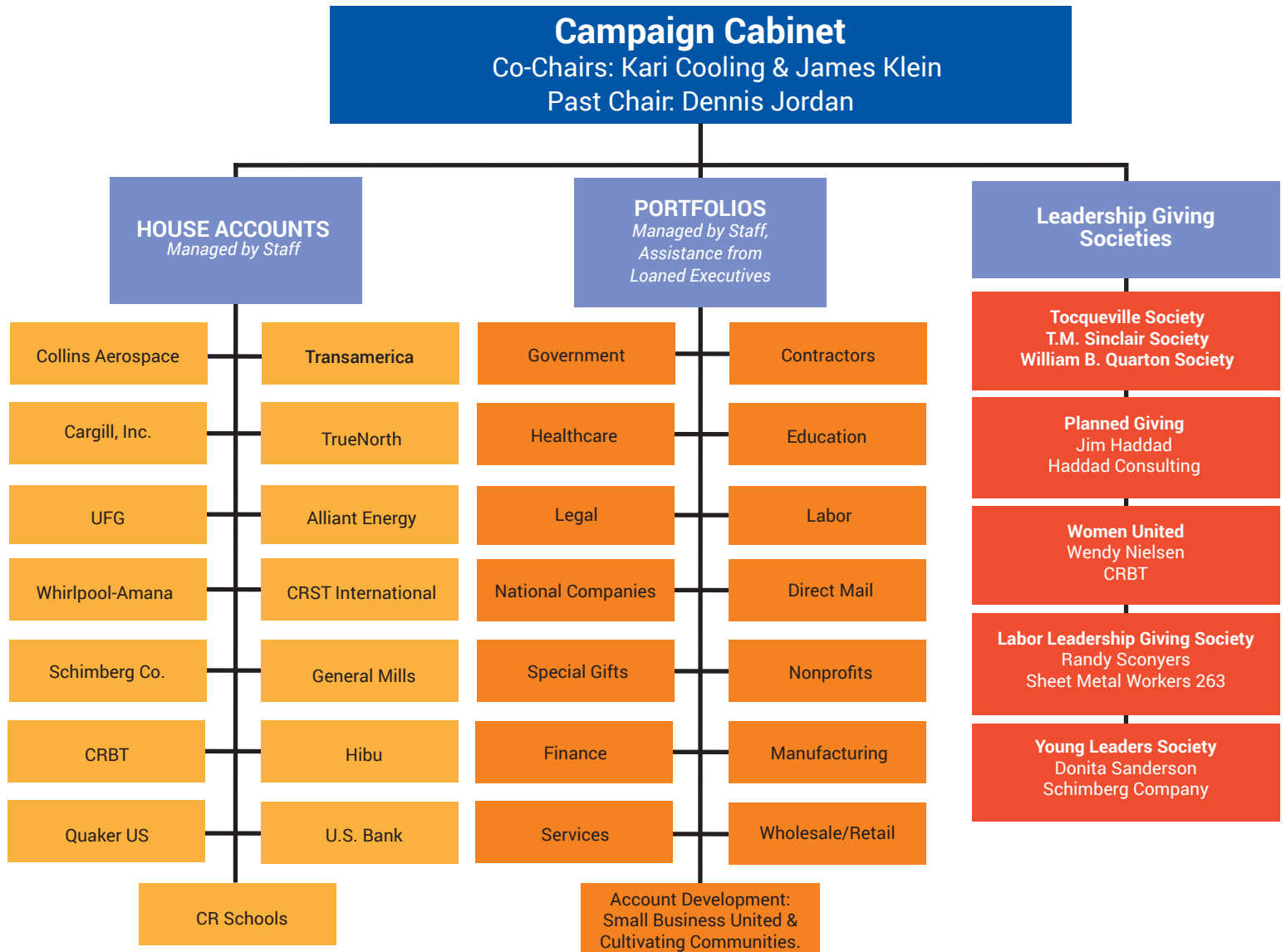
Annual Campaign							
Publics (Staff)	Internal	CEOs	Leadership Society Chairs	Loaned Executives (LEs)	Company Coordinators (CC)	Donors: In Workplace	Donors: Outside Workplace
<b>Tactics</b> annual campaign	Plan and execute campaign	CEO Calls, awards, special events	Special Events, Year Round Communications, Reports	Secure sponsors, Recruit Individuals, & LE materials, meetings, training, & execution	CC training, training manuals, kickoff, campaign celebration	Campaign materials, Presentations, Special Events, Year Round communications	Campaign materials, Special Events, Year Round communications
<b>January</b>	Internal strategy planning for upcoming campaign						
<b>February</b>	Stewardship to all active companies, sponsorship solicitation, secure chairs/cabinet members	Month of Love	Month of Love		Month of Love	Month of Love	Month of Love
<b>March</b>	Campaign Celebration	Campaign Celebration	Campaign Celebration	Campaign Celebration, Recruitment materials developed	Campaign Celebration	Campaign Celebration	Campaign Celebration
<b>April</b>	Campaign materials developed, challenge grants	CEO Calls Begin	Recruitment				Identification of Prospects
<b>May</b>	Training materials for CC and LEs, campaign analysis complete	CEO calls continue		LE Recruitment	Day of Caring	Day of Caring	Identification of Prospects
<b>June</b>	Finalize trainings, goal setting	CEO calls continue	Leadership Chairs Meeting	LE Recruitment	CC Recruitment Training Manual Campaigns	Pacesetter	Identification of Prospects
<b>July</b>	LE interviews, finish LE calls, CC trainings	CEO calls continue	Leadership Chairs Meeting	LE Recruitment	CC Training	Pacesetter Campaigns	
<b>August</b>	Prepare for LEs, begin company calls	Stewardship	Hold thankyou/kick off event	LE Training	CC Training	Stewardship	Stewardship
<b>September</b>	Track campaign progress, begin next year sponsorship planning, begin recruitment of incoming chairs	Kickoff & Company Campaigns	Kickoff, other events	LE Management	Kickoff & Company Campaigns	Kickoff & Company Campaigns	Solicitation
<b>October</b>	Campaigns running, sponsorship packet	Company Campaigns	Cabinet Advisory Meeting	LE Management	Company Campaigns	Company Campaigns	Solicitation
<b>November</b>	Campaign running	Company Campaigns	Cabinet Advisory Meeting	LE Management	Company Campaigns	Company Campaigns	Solicitation
<b>December</b>	Finalize work w/ LEs, campaign projections	Wrap up company campaigns, thank yous	Wrap up company campaigns, thank yous	Wrap up company campaigns, thank yous	Wrap up company campaigns, thank yous	Wrap up company campaigns, thank yous	Wrap up company campaigns, thank yous

Leadership Giving	
<b>Publics</b>	Leadership Givers
<b>Tactics</b>	Leadership Booklet, Thank Yous, Stewardship, Networking and Special UWECI Events, & Newsletters
<b>January</b>	Stewardship Letter, determine if using a committee or cabinet to help with goal setting and calls
<b>February</b>	Committee Meetings & Personal Visits, Month of Love activities
<b>March</b>	Week of Thanks & Personal Visits, set goals for upcoming campaign
<b>April</b>	Leadership Mailing & Personal Visits
<b>May</b>	Day of Caring & Personal Visits, plan Leadership event
<b>June</b>	Personal Visits, plan Leadership event
<b>July</b>	Tocqueville Step Up Mailing, Committee Meetings, & Personal Visits, finalize leadership Event
<b>August</b>	Leadership Mailing, Thank You Event, Committee Meetings, & Personal Visits
<b>September</b>	Committee Meetings & Personal Visits, Leadership event
<b>October</b>	Committee Meetings & Personal Visits
<b>November</b>	Leadership Mailing, Committee Meetings, & Personal Visits
<b>December</b>	Year-end Giving, Holiday Cards, Committee Meetings, & Personal Visits

Planned Giving	
<b>Publics</b>	Prospects/Donors
<b>Tactics</b>	Planned Giving Case, Thank Yous, Personal Visits, & Recognition Events
<b>January</b>	Stewardship Letter
<b>February</b>	Committee Meeting
<b>March</b>	Florida Event, Personal Visits
<b>April</b>	Personal Visits
<b>May</b>	Committee Meeting, Personal Visits
<b>June</b>	Personal Visits
<b>July</b>	Personal Visits
<b>August</b>	Committee Meeting
<b>September</b>	Planned Giving Legacy Event
<b>October</b>	Personal Visits
<b>November</b>	Committee Meeting
<b>December</b>	Personal Visits

UNITED WAY OF EAST CENTRAL IOWA								
Year	Board Chair	Campaign Chair	# of Agencies	# of Givers	Goal	Raised	% of Goal	% Change
United Charities Campaign								
1914		Archer Sinclair	4	3,000	\$25,000	\$24,900	99.6%	
1915		Archer Sinclair			\$26,360	\$20,000	75.8%	-4.76%
1916		Arthur Poe			\$24,375	\$18,000	73.9%	-10.00%
1917		A.L. Killian			\$28,966	\$21,000	73.4%	16.67%
1918		Ben H. Witwer			\$27,500	\$22,000	80.0%	4.76%
1919		J.S. Ely			\$33,233	\$29,000	87.2%	31.82%
1920		August C. Reps						
1921		August C. Reps			\$75,000	\$52,000	69.3%	79.31%
1922		August C. Reps						
1923		August C. Reps			\$75,000	\$56,000	74.6%	7.69%
Community Chest								
1924		Morris Sanford			\$87,167	\$79,000	90.60%	29.11%
1925		Sid Moore			\$88,750	\$80,000	90.1%	1.27%
1926		Arthur Poe			\$80,000	\$80,388	100.4%	0.49%
1927		Arthur Poe			\$79,912	\$69,556	87.0%	-13.47%
1928		A.C. Sinclair			\$100,000	\$99,835	99.8%	43.53%
1929		H.H. Cherry			\$85,000	\$85,389	100.4%	-14.47%
1930		George Laird		6,000	\$90,000	\$81,053	90.0%	-5.08%
1931		E.L. MaKibben			\$90,000	\$79,445	88.2%	-1.98%
1932	Dr. Richard Lord (to July) & E.L. MaKibben (Jul-Dec)	E.L. MaKibben			\$90,000	\$82,517	91.60%	3.87%
1933	E.L. MaKibben	Arthur Poe			\$56,000	\$40,760	72.70%	-50.60%
1934	Dr. C.T. Hickok	Dr. Harry Gage			\$65,000	\$63,214	97.2%	55.09%
1935	Ralph Yuill	Howard Green		7,000	\$65,000	\$57,243	88.00%	-0.0945
1936	Van Vechten Shaffer	E.B. Cameron			\$80,260	\$80,596	100.40%	40.80%
1937	Van Vechten Shaffer	Clare Marshall			\$85,752	\$89,086	103.8%	10.53%
1938	M.H. Morrison	M.H. Morrison			\$93,788	\$88,394	94.2%	-0.78%
1939	Karl P. Blaise	A.L. Smulekoff			\$89,605	\$89,033	99.3%	0.72%
1940	A.L. Smulekoff	Roy E. Choate		9,000	\$91,200	\$93,310	102.0%	4.80%
1941	Dr. J. Max Widmer	James L. Cooper			\$90,519	\$94,004	103.8%	0.74%
1942	Edward Sheehy & Howard Horan	Sumner Quarton			\$89,847	\$92,716	103.1%	-1.37%
1943	Sumner Quarton	Henry Haegg			\$179,272	\$193,600	107.90%	108.81%
1944	Henry Haegg	Robert Armstrong			\$160,059	\$204,447	127.70%	5.60%
1945	William J. Barron	I.B. McGladrey		16,900	\$230,000	\$204,260	88.80%	-0.09%
1946	William J. Barron	George Hearn & John W. Miller	12	15,800	\$142,262	\$161,200	113.3%	-21.08%
1947	L.P. Boudreaux	Lee Winterberg		15,384	\$178,900	\$175,866	98.3%	9.10%
1948	Harry Boyd	B.D. Sillman		18,849	\$186,900	\$206,943	110.70%	17.67%
1949	George Hearn	Alvin G. Keyes		21,200	\$189,125	\$191,874	101.50%	-7.28%
1950	B.D. Sillman	Frank T. Nye		22,685	\$216,317	\$212,592	98.20%	10.80%
1951	B.D. Sillman	B.J. Newburger	12	24,607	\$226,730	\$235,208	103.7%	10.64%
1952	J.W. Markey	M.E. Felden		24,619	\$234,684	\$236,788	100.90%	0.67%
1953	Wm. P. Ellwood	Duane Arnold	13	28,232	\$265,314	\$257,045	96.90%	8.55%
Community Chest of Cedar Rapids and Marion								
1954	B.J. Newburger	John B. Tuthill	14	28,608	\$270,362	\$271,405	100.40%	5.59%
1955	Robert S. Gates	Norman Lipsky	14	31,209	\$300,686	\$293,233	97.50%	8.04%
1956	C.H.Jordan	Arthur Clauss	14	30,420	\$333,441	\$333,128	99.9%	13.61%
United Fund of Cedar Rapids and Marion								
1957	C.H. Jordan	Louis D. Burkhalter	17	27,339	\$495,016	\$498,693	100.70%	49.70%
1958	Arthur F. Clauss	Gordon DeLay	19	30,258	\$496,915	\$506,428	101.9%	1.55%
1959	Gordon Simonds	B. Philip Bowen	21	34,381	\$551,641	\$551,841	100.0%	8.97%
1960	Richard Crane	Lew Van Nostrand	24	32,186	\$555,796	\$551,345	99.2%	-0.09%
1961	Hillis Gill (UGN)	Robert E. Yaw	29	30,949	\$636,160	\$620,570	97.5%	12.56%
1962	Hillis Gill	Paul Shawver	30	32,866	\$725,093	\$684,423	94.4%	10.29%
United Community Services								
1963	Marshall G. Hardesty	James Colbert	32	1,914	\$774,404	\$735,602	95.0%	1.45%
1964	Marshall G. Hardesty	C.C. Birr	32	33,900	\$807,918	\$801,210	99.2%	3.46%
1965	Robert S. Chadima	E.W. "Bill" Munsell	33	32,066	\$817,840	\$830,919	101.6%	2.85%
1966	Charles H. Sheehy	Bob Fawcett	31	37,617	\$914,360	\$917,420	100.3%	12.18%
1967	Glenn Johnson	Cleo Edwards	31	37,617	\$914,360	\$917,420	100.3%	0.33%
1968	Donald Ebinger	George Lowe	34	36,412	\$960,360	\$987,423	102.8%	7.99%
1969	Robert M.L. Johnson	Henry Madden	32	36,517	\$1,050,000	\$1,063,590	101.2%	10.75%
1970	C. C. Birr	Tom Redford	24	34,712	\$1,080,000	\$1,045,484	96.8%	-0.43%
1971	Henry Madden	Harold Wendorf	22	29,985	\$1,096,416	\$1,040,711	94.9%	-3.64%
1972	Larry McGrath	Paul Darling	22	30,593	\$1,099,000	\$1,081,711	98.4%	-1.34%
1973	William Ramstad	Tom Parks	21	32,604	\$1,103,000	\$1,111,711	100.8%	1.16%
United Way of Linn County								
1974	A.A. Rogers	Clare Rice	21	30,823	\$1,250,830	\$1,222,424	97.7%	10.0%
1975	Anita Terpstra	Emmett Scherrman	20	31,739	\$1,442,691	\$1,305,781	90.0%	6.8%
1976	Marshall Hardesty Jr.	Darrell Schumacher	18	31,899	\$1,465,000	\$1,467,000	100.0%	12.3%
1977	J. Bernard Rehnstrom	James Davidson	17	31,791	\$1,572,000	\$1,565,289	100.0%	6.7%
1978	Emmett Scherrman	Alfred E. Williams	17	33,821	\$1,729,361	\$1,731,581	100.1%	10.6%
1979	James Davidson	Vyrl Justice	17	33,913	\$1,909,831	\$1,909,988	100.0%	10.3%
1980	Alfred E. Williams	Charles Denney III	18	30,170	\$2,100,000	\$2,003,213	95.4%	4.9%
1981	Thomas R. White	Eugene Field	20	28,659	\$2,350,000	\$2,199,122	93.5%	9.8%
United Way of East Central Iowa								
1982	David W. Hughes, III	Harold Miller & Ed Nissen	20	25,559	\$2,400,000	\$2,305,520	99.3%	4.8%
1983	Alfred E. Williams (Edward K. Nissen)	Gordon Epping & G.Richard Johnson	23	24,869	\$2,600,000	\$2,583,921	100.0%	12.1%
1984	G.Richard Johnson	Carl Ashley & Jerry Maples	23	25,326	\$2,750,000	\$2,751,320	96.5%	6.5%
1985	Eric Hender	John Knapp	27	25,514	\$3,109,000	\$3,001,649	99.2%	9.1%
1986	Eric Hender	Art Christoffersen	29	28,223	\$3,300,000	\$3,260,000	99.2%	8.6%
1987	John Knapp	Kathy L. Lamb	29	28,698	\$3,550,000	\$3,437,548	99.2%	5.4%
1988	Art Christoffersen	Richard Meyocks	30	30,897	\$3,852,128	\$3,694,406	97.7%	7.5%
1989	Gary Streit	David E.G. Miller	30	30,768	\$4,044,444	\$4,045,449	100.1%	9.5%
1990	Linda DeWolf	Henry Royer	30	30,027	\$4,281,101	\$4,136,051	97.0%	2.2%
1991	David E.G. Miller	Jack Evans	30	31,391	\$4,400,000	\$4,694,689	106.1%	13.5%
1992	Kathy Lamb/Linda DeWolf	Don Zierath	33	29,784	\$4,485,300	\$4,519,895	100.1%	-3.7%
1993	Tom Seldon	Mike Schrantz	33	29,216	\$4,800,000	\$4,773,501	98.7%	5.6%
1994	Susie McDermott	Barry Spear	32	28,186	\$5,000,000	\$4,967,283	99.4%	4.1%
1995	Kathy Eno	Dennis Boatman	31	27,266	\$5,000,000	\$5,087,246	101.7%	2.4%
1996	Kathy Eno	Gary Streit	31	26,378	\$5,200,000	\$5,272,607	101.4%	3.6%
1997	Dennis Boatman	Jim Roberts	31	27,906	\$5,400,000	\$5,419,639	100.4%	2.8%
1998	John Pierson	Terri Christoffersen	32	27,983	\$5,726,000	\$5,826,000	100.7%	7.5%
1999	Terri Christoffersen	Kathy Eno	32	30,171	\$6,400,000	\$6,433,500	100.5%	10.4%
2000	Tom Hayden	Dan Thies	32	29,013	\$7,100,000	\$7,114,210	100.2%	10.6%
2001	Steve Knierim	Bruce Anderson	32	28,111	\$7,612,000	\$7,702,097	101.2%	8.3%
2002	Dennis McMenimen	Jack Cosgrove	35	26,068	\$8,010,000	\$7,810,000	97.5%	1.4%
2003	Gerry Widen	Chuck Peters	35	26,139	\$8,100,000	\$8,120,000	100.2%	4.0%
2004	Bruce Anderson	Amy Johnson Boyle	35	25,345	\$8,500,000	\$8,515,000	100.2%	4.9%
2005	Chuck Peters	Rex Eno	34	25,267	\$8,850,001	\$9,010,285	101.8%	5.8%
2006	Katie Oberbroeckling	Jim Tinker	32	25,409	\$9,350,000	\$9,425,550	100.8%	4.6%
2007	Marc Gullickson	Lydia Brown	32	23,702	\$10,000,000	\$10,038,700	100.4%	6.5%
2008	David Markward	John Bickel	42	24,383	\$10,400,000	\$10,416,000	100.2%	3.8%
2009	Larry Helling	Dennis Jordan/Beth Malicki	40	23,691	\$10,400,000	\$10,330,000	99.3%	-0.8%
2010	Cindy Dietz	Barry & Gilda Boyer	40	24,367	\$10,350,000	\$10,512,000	101.6%	1.8%
2011	Kevin Knutson	Tim Kintner	37	19,258	\$10,550,000	\$10,581,690	100.3%	0.7%
2012	Greg Neumeyer	Marc & Cathy Gullickson	41	20,506	\$10,000,000	\$10,354,496	103.5%	-2.1%
2013	Brad Hart	Ron Olson	39	19,587	\$9,900,000	\$10,035,519	101.4%	-3.1%
2014	Brad Hart	Jack & Matt Evans	28	19,339	\$11,000,000	\$11,022,534	100.2%	9.8%
2015	Katie Mulholland	Larry Helling & Cindy Dietz	31	17,609	\$10,300,000	\$10,318,151	100.2%	-6.4%
2016	Jon Bancks	Brad Hart & Kevin Knutson	28	16,423	\$10,000,000	\$9,969,510	99.7%	-3.4%
2017	Cathy Terukina	Kate Minette and Anne Carter	24	13,925	\$9,700,000	\$8,951,737	92.3%	-10.2%
2018	James Klein	Darrel Morf, Paul Morf, Andrew Morf	24	12,275	\$9,000,000	\$8,653,561	96.2%	-3.3%
2019	Linda Mattes	Dennis Jordan/Cabinet Chair	24	10,899	\$8,600,000	\$7,884,798	91.7%	-8.9%
			Total Announced			\$204,444,977		

# 2020 United Way Campaign Structure



# Be a Leader Who Creates Lasting Change in Our Community

Be a leader by becoming a member of a Leadership Giving Society designed to fit your interest and ability to give. In 2019 nearly 2,700 donors contributed \$3.5 million to United Way's \$7.8+ million campaign. Leadership donors provide approximately 45% of dollars raised in the annual campaign.

## Alexis de Tocqueville Society

*Donors who give \$10,000+*

As a member of this society, you join a network of leaders who seek to create long-lasting, positive change. Tocqueville Society members are true philanthropists whose gifts demonstrate a significant commitment to the community along with the desire to leave an enduring impact.

## T.M. Sinclair Society

*Donors who give \$1,250–9,999*

The T.M. Sinclair Society honors one of our area's founding fathers, Thomas M'Elderry Sinclair, who owned a packing plant in the 1800's and opened a mission at his plant so children could learn how to read and write. Through their leadership gifts, members of this society maintain Mr. Sinclair's vision for our community.

## William B. Quarton Society

*Donors who give \$500–1,249*

The William B. Quarton Society honors Cedar Rapids philanthropist Bill Quarton (1903–2007). Members of the society actively promote volunteerism in the community.

## Women United

*Donors who designate \$500+ to Women United*

Women in our community who make annual investments of \$500 or more can choose to contribute directly to Women United. Members support health needs of un- and under-insured women in our community.

## Labor Leaders Society

*Labor donors who give \$350+*

United Way of East Central Iowa has partnered with labor agencies since 1969. The Labor

Leaders Society recognizes Union members who demonstrate a personal commitment to caring for one another and those most in need.

## Young Leaders Society

*40 years or younger giving \$250+*

The Young Leaders Society recognizes individuals or couples under the age of 40. A portion of funds supports low-income children in the RED Ahead program, which develops language and literacy skills needed for kindergarten. This group offers networking opportunities and encourages community leaders to grow leadership skills through the BOLD board training series.

## Touch Tomorrow Society

*Individuals who make estate commitments or gifts of \$1,000+ to UWECE Endowment*

Leaving a legacy that will strengthen our communities for years to come is one of the greatest gifts you can give. You can create your legacy by improving lives and making an everlasting impact in our community both today and tomorrow.

## William P. & Gayle S. Whipple Legacy Circle

*Individuals who endow their annual gift*

Established in 2012, the Whipple Legacy Circle honors individuals who endow their annual leadership gift to United Way.

## Diamond Donors

Join the many donors who have been giving to United Way for 25 years or more — whether you gave to United Way while living in Eastern Iowa or in another community. These loyal contributors have proven their outstanding leadership and commitment.

\* When tracking leadership donors, United Way counts by households, not individuals.



United Way  
of East Central Iowa



# Planned Giving

## Fact Sheet

### Purpose

United Way of East Central Iowa's endowment is a permanent financial resource that provides perpetual income. Donations to the Endowment Fund provide steady amounts of spendable income. Each year, a portion of the annual income generated by the endowment supports United Way partners and initiatives.

### Vision of the Future

United Way's vision is to create an endowment fund that ensures our legacy and mission. This vision can become a reality with an effective planned giving program that meets donors' needs. We must communicate our value to donors by demonstrating how we strengthen the community through strategically deploying resources to programs that will have a significant impact on our quality of life. One strategy already in place is the Leadership Giving program.

### Touch Tomorrow Society (Planned Giving Society)

The Touch Tomorrow Society recognizes donors who support United Way's Endowment through outright or estate gifts.

Currently, there are 183 individual members.

### Whipple Legacy Circle

In 2012, UWECI created the Whipple Legacy Circle in honor of William P. and Gayle S. Whipple, the first Eastern Iowans to endow an annual gift to United Way. Each year, a portion of the earnings from the Whipples' contribution provides a campaign gift in their name at the Alexis de Tocqueville Society Leadership level.

The Whipple Legacy Circle is a giving level within the Touch Tomorrow Society.

Currently, there are 114 individual members.

### Activity Overview

- Host Legacy/Planned Giving events every other year
- Provide endowment gift opportunities through the United Way "Family Funds" held at the Greater Cedar Rapids Community Foundation (GCRCF) and Baird.
- Encourage endowing annual giving through Named Endowed Designations (NEDS) held at the GCRCF

# **INDEX 4**

## **COMMUNITY BUILDING**



# Community Building

## Fact Sheet

For more than 100 years, United Way of East Central Iowa has been a critical partner in creating stronger communities. As we work to build strong communities, we are aware we can't do it alone; no one can. That's why we partner with community stakeholders, organizations, donors, and area nonprofits to pull together the resources needed to support individuals and families during some of their greatest challenges. We invest in programs that are necessary to build a thriving community.

UWECI is committed to create lasting change with measurable improvements for people in Iowa, Jones, Linn, Benton and Cedar counties. As a convener, collaborator, activator and connector for change, our vision is to create thriving communities where individuals have access to education, financial stability, and health in order to provide for self-sufficiency and a high quality of life.

- **Convene:** The community around shared goals
- **Collaborate:** To obtain and share information and design solutions
- **Activate:** To set knowledge into action and mobilize our resources
- **Connect:** UWECI's mission to all our work

United Way realizes that in order to create positive, lasting community change we need to get to the root cause of our most critical needs. It is not enough to find shelter for a family for one night; but we must change the conditions that led to homelessness in the first place. This requires the work of our entire community.

Thriving communities are built when available resources meet needs. We focus on equity, diversity and inclusion, collaboration and innovation.



EQUITY



DIVERSITY + INCLUSION



COLLABORATION



INNOVATION

In order to achieve the direction, alignment and commitment necessary to make real change happen at the community level we must pursue Collective Impact. This is characterized by distributed leadership, networks and extraordinary levels of trust and collaboration. United Way offers investors the unique opportunity to participate in these cross sector partnerships. Five key characteristics tell us when we are working collectively.

### The Five Conditions of Collective Impact

Common agenda	All participants have shared vision for change, including a common understanding of the problem and a joint approach to solving it through agreed upon actions.
---------------	---

<b>Shared measurement</b>	Collecting data & measuring results consistently across all participants ensures efforts remain aligned & participants hold each other accountable.
<b>Mutually reinforcing activities</b>	Participant activities must be differentiated while still being coordinated through a mutually reinforcing plan of action.
<b>Continuous communication</b>	Consistent & open communication is needed across the many players to build trust, assure mutual objectives, & create common motivation.
<b>Backbone support</b>	Creating & managing collective impact requires a separate organization(s) with staff and a specific set of skills to serve as the backbone for the entire initiative & coordinate participating organizations & agencies.

Community Building staff engages in assessing community needs, advocacy work, process improvement, volunteer engagement and grant writing. These are just a few examples of the ways in which the team and the whole organization bring diverse resources to achieving the community goals.

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 numerous collaborations at the local, state and national level.

United Way of East Central Iowa presents an intersecting set of investment areas where programs can contribute to significant outcomes. These areas create conditions for lasting change by bridging critical gaps, enhancing programs, building awareness, and fostering collaboration. United Way's funded partners are key in making an impact in communities. These programs and services provide expansive work and critical collaboration needed to meet our community goals. In addition, it is not just the services provided, but how services are provided, that makes a critical difference. Our partners work to meet people's needs on a day-to-day basis and make a difference in the quality of people's lives in order to create thriving communities.

## The Impact of Our Partners



### More Healthy People

- Access to timely and appropriate health care
- Healthy independent community living for older adults and people with disabilities
- Social-emotional and physical well being
- Education and prevention



### More Financially Stable People

- The ability to pursue education, employment, and training that grows income
- Develop skills to increase or retain employment, stabilization of housing and income
- Resiliency through education and empowerment
- Availability and access safety net services to address critical needs



### More Kids on Track to Succeed in School, Work, & Life

- Caregiver engagement and support
- Social-emotional health during out of school time
- Exploration and preparation for success after school
- Quality early childcare and education

### We measure and evaluate results

Each focus area (health, education, and financial stability) have a business plan and report card to assess our annual progress on key strategies and our overall community goals. The Solutions team, along with staff, review achievement data annually.

It is the goal of the Solutions Teams to fund the strongest and best strategies to achieve the community goals. They conduct an intensive and competitive review process every three years.

The teams give priority to strategies that:

- Demonstrate a strong connection between community need and proposed strategies
- Demonstrate strong performance in improving the well-being of clients
- Can measure their performance
- Integrate promising and best practices, and consider leveraging resources and collaborative opportunities
- Maximize the impact of funded strategies on achieving the goals
- Aligned with target population
- High leverage investments = high priority issue and high power to change

Each team reads and scores proposals. The teams discuss proposals and generate a list of questions in preparation for site visits. Each applicant participates in a site visit where reviewers have the opportunity to ask questions, tour facilities and learn more about the agency's work. Site visits may include agency staff, board representatives, and clients. Final funding is presented to UWECI's board for approval.

During years two and three of the cycle the Solution Teams review results and engage partners in conversations about emerging trends.

The Accountability Review Team (ART) reviews partner agency materials such as agency financial information, IRS Form 990s and audits to ensure that all organizations receiving funding through United Way are financially sound and have appropriate policies and procedures in place. The team uses a checklist (based on agency size) to determine if the agency meets generally accepted standards of good governance and administrative practice. This checklist is available to all agencies on the United Way of East Central Iowa website ([uweci.org](http://uweci.org)). The ART reports annually to the board and the community on nonprofit financial and governance trends.

**The following pages highlight our community goals and collaborations.**



United Way  
of East Central Iowa

# Community Building Benchmarks

## Education

**Our goal: By 2030, increase the number of proficient 3<sup>rd</sup> graders to 95%.**

### The Issue

United Way focuses on literacy because if a child is not reading proficiently by the time they finish third grade, they are four times more likely not to graduate high school on time. If this child is low-income, they are 13 times more likely not to graduate high school on time than a higher-income, proficient peer. <sup>1</sup> If an individual does not graduate from high school, they will earn less than those with a high school diploma or college degree. Professor Robert D. Putnam estimates this loss of earning, combined with loss of economic growth and tax revenue, equal to \$13,900 per youth, per year. <sup>2</sup>

Research shows that children from economically disadvantaged families can be up to two years behind in language development. <sup>3</sup> Low-income children are also not as ready for kindergarten as their higher-income peers. According to the most recent data available from the 2015-2016 school year, only 48% of Free Reduced Price Lunch (FRPL) kindergarteners were proficient in early literacy skills compared to 75% those not eligible for FRPL. <sup>4</sup>

### What We Know

- 31.5% of children live in single parent families. <sup>5</sup>
- 36.8% of children in the UWECI 5-County Area and 54.3% of children in Cedar Rapids are eligible for free or reduced price lunch. <sup>6</sup>
- 62.1% of 4th graders with low socioeconomic status are proficient in reading. <sup>7</sup>

### Key Strategies

We invest in solutions designed to help all children have the skills and opportunities needed to succeed in school, work, and life. Our funding falls into five categories of core supports.

- Child Development – All children from birth to age five are screened early for cognitive, social-emotional, fine and gross motor, language, and early literacy skills, and developmentally appropriate skills.
- Parenting – Parents of young children will demonstrate knowledge and skills to promote their children's successful development.
- Improve Literacy – Parents need the knowledge and skills to teach reading to their children and students need the necessary reading skills to succeed in school.
- Supporting Engagement and Building Hope – Youth need the relationship supports and positive social-emotional skills to set and achieve their future goals.

To view a list of our funded partners, visit [uweci.org/what-we-do/our-partners/funded-partners/](http://uweci.org/what-we-do/our-partners/funded-partners/)

## Reading into Success: A Collaborative Community Approach

Even with these successful programs, there is much more to be done in our community. That's why United Way partners with the entire community to address early-grade literacy through a collaborative known as Reading into Success. Supported by a national network of more than 300 communities and lead by the Annie E. Casey Foundation, Reading into Success works to improve third grade reading by targeting kindergarten readiness, chronic absenteeism, summer learning, youth hope and well-being, and every day reading. After completing our first self assessment, Reading into Success received a 2016 Pacesetter Award for demonstrating population-level, communitywide measurable improvement in school readiness.

## We engage volunteers in creating change

- VIP – Volunteers in Proficiency help with the attainment of reading proficiency. The program is designed so working professionals can provide reading mentorship to struggling students during their workday.
- Literacy Kits – These easy onsite projects are kits designed by skilled volunteers and include: a book, a letter to the parent about the importance of reading and how to have fun with the kit, and all the supplies necessary for four story-related activities (creative, skill building, response, and math). Kits are completely compiled by volunteers and distributed to area partners.

## Citations

<sup>1</sup> Nicholas Zill and Jerry West, "Entering Kindergarten: A Portrait of American Children When They Begin School: Findings from The Condition of Education 2000," U.S. Department of Education, National Center for Education Statistics. (Washington, DC: U.S. Government Printing Office, 2001) <http://nces.ed.gov/pubs2001/2001035.pdf>

<sup>2</sup> R. Putnam, Our Kids: The American Dream in Crisis (New York: Simon & Schuster Press, 2015), 232.

<sup>3</sup> D. J. Hernandez, "Double Jeopardy: How Third-Grade Reading Skills and Poverty Influence High School Graduation," The Annie E. Casey Foundation: Center for Demographic Analysis, [New York: University at Albany, Foundation for Child Development], 2012.

<sup>4</sup> Cedar Rapids Community School District. Per email with Carla Riley, 5/1/2016. Subject: Data Question - K Readiness by FRPL

<sup>5</sup> United States Census Bureau. (2012-2017). Table Number B11005. *American Community Survey 5-year Estimate*.

<sup>6</sup> Iowa Department of Education. Bureau of Information and Analysis. 2018-2019 Public School Free and Reduced Lunch by District.

K-12 Enrollment and FRL Eligible Students based on school districts with district office in one of UWECI five-county area. Cedar Rapids percentage is for Cedar Rapids School District.

<sup>7</sup> Iowa Department of Education. Bureau of Information and Analysis. 2017 Annual Assessment Results – State Report Card.

# Reading into Success

## Accelerating Our Education Goal Achievement

### The Issue

In 2015, the Iowa Department of Education reported 74% of third grade students were proficient as measured by the Iowa Adequate Yearly Progress Assessment. This percentage decreases to 59% for low-income students.

These numbers inspired United Way to research the Campaign for Grade Level Reading. Their goal of “By 2020, a dozen states or more will increase by at least 100% the number of children from low-income families reading proficiently at the end of third grade” aligns perfectly with United Way’s education goal to “increase the number of low-income children in our five-county area who are on track academically and developmentally by fourth grade by 30% by 2020.” The Campaign offers a structure, technical assistance, research, and networking that compliment collective impact and result in a strong start to our campaign work. As 2020 comes to an end, the overall goal and results will be evaluated in order to further continue our work

As we have seen in our education work, it takes an entire community to achieve progress. That is the mission of United Way’s Community Impact efforts and using those goals, Reading into Success works to guide the entire community toward the common measurements of improving grade-level reading through shared goals, measurements, and strategies. A collaborative with more than 20 partners from the nonprofit sector, local businesses, four school districts, community members, and United Way as the backbone organization, Reading into Success is well poised to accelerate achievement of United Way’s education goal.

Reading into Success plans to use the following strategies: Kindergarten Readiness, Summer Learning, and Every Day Reading.

### Kindergarten Readiness

- **Strategy:** Using nationally recognized resources, early childhood providers offer access to consistent, impactful messaging to parents about brain building for their children.
- **Strategy:** [Ready 10!](#) provides parents with a list of ten skills most desired for kids entering kindergarten, as identified by the kindergarten teachers in our four local school districts. Partners such as the Cedar Rapids Public Library, YPN, WayPoint, Parent Education Consortium, and more share the list of ten along with activities care givers can do with children to develop the skills through programming, activity kits, and printed materials including four locally written and illustrated locally. In fall 2019, kindergarten teachers began assessing how many of the ten skills students in their classrooms had at the beginning of the year. This data will be utilized to create targeted messaging and activities in coming years.
- **Result:** The number of children entering kindergarten that score as proficient on the fall FAST assessment will increase from 55% to 75%.



## Summer Learning

- **Strategy:** Local learning experts will compile and disseminate evidence-based strategies that any summer program or care provider can incorporate into their activities to enhance children's learning retention during the summer months.
- **Strategy:** Replicating a program from College Community, the Cedar Rapids District is applying the research of Richard Allington in a reading pilot during the 2016 summer.
  - The program expanded to include both Cedar Rapids and Marion Independent School Districts for the summer of 2017. The program has been renamed Take 10!
  - In 2018 Take 10! expanded to a second school in Cedar Rapids through support from St. Paul's Methodist Church. In addition to funding, church members visit with students throughout the summer at the Jane Boyd Achievement Academy.
  - **Strategy:** Expand access to programming and materials during the summer. In 2019, Reading into Success provided funding for five AmeriCorps members at the Marion and Hiawatha Public Libraries and Jane Boyd Community House to support summer reading. The AmeriCorps will take summer reading and literacy activities into the community to reach children who are not able to visit the library.
- **Results:** Increase the number of children returning to school in the fall who have maintained or increased proficiency as measured by FAST. A specific percentage will be set in the fall of 2018 when fall FAST scores are available for comparison.

## Every Day Reading

- **Strategy:** One 2 Read, funded through the Friends of the Cedar Rapids and Marion Public Libraries, provides a copy of the same book to every second grader in the metro area. In addition, the author visits our community and talks with students in all four districts and at evening events at the library. In 2018 the program expanded to include book-related activities and story times at the libraries. In 2020 the program was suspended due to Covid-19 closing the schools; the team hopes to deliver the books to students when they return to school in the fall.
- **Results:** The Cedar Rapids metro area has a culture of literacy where community members understand the importance of learning to read, engage children in literacy opportunities, and participate in community activities to promote reading.



United Way  
of East Central Iowa

# Community Building Benchmarks

## Financial Stability

**Our Goal: By 2030, increase the number of financially stable households by 15%**

### The Issue

It is difficult for low-income families to transition from instability to financially stable. Increasing employment and educational opportunities are key ways to increasing income. As well, for the population making less than 250% FPL, maintaining stable housing, food, and transportation challenging yet essential to achieving financial stability.

### What We Know

- 30% of all families in Linn County do not make enough to support their household. In some towns, that number is almost 50%. <sup>2</sup>
- 39% of Black/African American and 31% of single female headed households in Linn County live under 125% of the Federal Poverty Level. <sup>3</sup>
- 42% of renters in Linn County are housing cost burdened. This means they pay over 30% of their monthly income on housing. <sup>4</sup>
- 31,450 people are food insecure in UWECI's 5-County Area.
  - 75% of these individuals reside in Linn County but only 48% qualify for SNAP. <sup>5</sup>
- 36% of individuals over the age of 25 in UWECI's 5-County Area have a high school education or less. <sup>6</sup>

To learn more, read our ALICE Report and Cedar Rapids Neighborhood Data Report at [uweci.org/what-we-do/our-community-united-way-reports/](http://uweci.org/what-we-do/our-community-united-way-reports/).

### Key Strategies

United Way invests in comprehensive strategies that help families move towards financial stability. Our priorities include:

### Meeting Basic Needs

When basic needs are not met, planning for the future is nearly impossible. To counter this variability, we focus on strategies that fill the gaps and smooth transitions to help families successfully reach financial stability including housing, access to food, and transportation.

- **Stabilization:** benefits screening and enrollment, access to free tax preparation and credits and refunds, legal services that stabilize housing, employment and benefits.
- **Skill Building:** basic and soft skills that allow individuals to enter the workforce, develop financial literacy and capabilities, and build a resume and professional network.
- **Grow income:** access to career pathways and supports to enter and complete post-secondary education in a field that has local demand leading to employment that puts their household more than 250% FPL

### We build and support collaborative solutions

- **Volunteer Income Tax Assistance** – free preparation of federal and state tax returns for households with income under \$54,000



- United Way 2-1-1 – free, confidential, referral, and information service that connects people from all communities and ages to a specialist who will help them find local health and human services 24 hours a day, seven days a week by phone, text, or online
- Linn Area Partners Active in Disaster – collection of more than 30 local health and human service providers, government agencies, funding sources, and faith-based organizations with a goal to empower communities, expedite response, improve management of volunteers and donations, and provide resources for long-term recovery
- Opportunity Center – multi-agency, cross sector collaborative initiative situated in a high needs neighborhood, Westdale, to assist individuals in finding jobs, strengthening their finances, and improving their lives through quality education and training, financial literacy, and access to community services. The Opportunity Center focuses on populations that typically are underrepresented and facing disproportionate barriers to economic mobility and financial stability. Collaborative leadership for the Opportunity Center includes the Cedar Rapids Public Library, Iowa Workforce Development, Kirkwood Community College, and United Way of East Central Iowa.

### **We advocate for policy change**

United Ways of Iowa advocates for investments that enable Iowans to obtain and sustain employment. These include funding for childcare assistance to offset the cliff effect, public/private transportation solutions, and support education and training programs.

### **We engage volunteers in creating change**

- Free tax preparation
- Food collection and distribution

### **Citations**

<sup>1</sup> All data used for this calculation was obtained from the US Census American Community Survey 5-year estimates from Table “B19131: Family Type By Presence of own Children under 18 year by Family income in the Past 12 Months”

<sup>2</sup> The United Way. The United Way Alice Report – Iowa. (2018). Alice in Linn County.

<sup>3</sup> United States Census Bureau. (2012-2017). Table Number S1703. *American Community Survey 5-year Estimate*.

<sup>4</sup> United States Census Bureau. (2012-2017). Table Number DP04. *American Community Survey 5-year Estimate*.

<sup>5</sup> Feeding America . "Map the Meal Gap." 2017. Food Insecurity By County.  
<https://map.feedingamerica.org/county/2017/overall/iowa/county/linn>

<sup>6</sup> United States Census Bureau. (2012-2017). Table Number S1501. *American Community Survey 5-year Estimate*.

# Community Building Benchmarks

## Health

**Our Goal: By 2030, decrease the number of individuals who report poor or fair health by 10%.**

### The Issue

The conditions in which we are born, grow, live, work, and age influence our lifelong health. Factors that influence our health include healthy vs. risky behaviors, clinical care, social and economic factors, and environmental factors. Socioeconomic factors and health behaviors account for 70% of health outcomes and determine length and quality of life.<sup>1</sup>

### What We Know

It is important to focus on birth to end of life for both rural and urban communities in our service area. Needed services range from prevention and treatment all the way to stabilization. The human services system in the Cedar Rapids community consists of many cross-sector agencies and organizations working independently to serve those in need. Working in these silos results in, at best, frustration for clients and workers, and at worst, duplication of services, lack of identification of needs for clients, no communication or strategy, burnout for workers, and excessive costs for agencies and organizations. However, with proper coordination across systems, we can begin to reduce health barriers and promote well-being, healthy behaviors, and healthy aging across all life stages, especially for those who are at greater risk of health disparities.

- 18% of youth in Linn County either strongly agree or agree that someone in their home has a serious alcohol or drug problem.<sup>2</sup>
- 21% of adults in Linn County report either excessive or binge drinking.<sup>3</sup>
- More than 38,000 people in our service area are estimated to have experienced poor mental health.<sup>4</sup>
- 994 cases of child abuse were confirmed or founded in 2018 throughout the UWEI 5-County Area. 50% of these instances were conducted against children 5 years old or younger.<sup>5</sup>
- 31% of older adults in Linn County do not have enough income to meet their needs.<sup>6</sup> There are more than 45,000 people age 65+ in our UWEI 5-County Area (69% of those live in Linn County).<sup>7</sup>
- Additionally, in the ECI 5-County Area, 4% of children ages 0-17, 8% of adults ages 18–64; and 29% of seniors age 65+ are living with at least one disability that impacts their quality of life.<sup>7</sup>

### Key Strategies

We invest in three focus areas:

- Preventative Health – Increase factors that contribute to long-term health by increasing education, screening, early detection, and reducing barriers to services.
- Reducing Adverse Experiences – Prevent, mitigate, and treat main contributors of adverse childhood experiences for families with children to build resiliency.

- Community Living – Support home-based services that increase well-being and independence for older adults and persons living with disabilities.
- Care Coordination - Enhance efficiency in referrals, business efficiency, awareness of services, effective communication, performance management, and improved client outcomes

### **We build and support collaborative solutions**

- Women's Health Initiative – Our Women United selected women's health as their priority investment area. Three partners work together to improve the health of women through financial assistance for services, preventative screening, and care coordination.

### **We advocate for policy change**

United Ways of Iowa advocates for policies that create a more comprehensive approach to mental health services for all Iowans, particularly in the area of children's mental health and women's health.

### **Citations**

<sup>1</sup> Adapted from the World Health Organization: Marmot, 2005; McGinnis, Williams-Russo, & Knickman, 2002

<sup>2</sup> The Iowa Department of Public Health. Iowa Youth Survey, 2018. Linn County.

<sup>3</sup> County Health Rankings. Iowa, 2018. Excessive Drinking.  
<https://www.countyhealthrankings.org/app/iowa/2018/measure/factors/49/map>

<sup>4</sup> UWEI Mental Health Condition Report (2018)

<sup>5</sup> The Iowa Department of Human Services. Child Welfare Report, 2018. Child Maltreatment Data.

<sup>6</sup> The United Way. ALICE in Iowa Report, 2018. Linn County

<sup>7</sup> United States Census Bureau. (2012-2017). Table Number S1810. *American Community Survey 5-year Estimate*.

Benton, Cedar, Iowa, Jones, Linn Counties Disabled population <17 / Benton, Cedar, Iowa, Jones, Linn Counties total population <17 = Percentage of ECI Area <17 disabled

Benton, Cedar, Iowa, Jones, Linn Counties Disabled population 18-64 / Benton, Cedar, Iowa, Jones, Linn Counties total population 18-64 = Percentage of ECI Area 18-64 disabled

Benton, Cedar, Iowa, Jones, Linn Counties Disabled population >65 / Benton, Cedar, Iowa, Jones, Linn Counties total population >65 = Percentage of ECI Area >65 disabled

# WOMEN UNITED

## FY19 ANNUAL REPORT



**390 MEMBERS**  
in FY19



**\$260,000+**  
raised for our mission

### Mission

Women United unites funds and resources to ensure the well-being of women in need.

### Vision

Women in need have the opportunity to achieve well-being and live prosperous, productive lives, creating healthier communities in Eastern Iowa.

### Partners

Women United provides funds to:

- Area Substance Abuse Council (ASAC)–Heart of Iowa
- Community Health Free Clinic (CHFC)
- Eastern Iowa Health Center (EIHC)

### Membership

In FY19, Women United members had 390 women become members. This year's Women United steering committee is chaired by Jessica Horaney of Collins Aerospace.

### Last Year's Results

Women United distributed \$260,530+ to its three partners. Those partners provided services to local women including:

- 11,232 prescriptions for women
- 2,798 women received screenings and care coordination
- 1,388 women received co-pay assistance
- 275 dental services for women

### Rebuilding & Reconnecting Families

Jennifer was struggling with daily alcohol and drug use when she lost her job and house. Deep down she knew things were getting out of hand, but that didn't stop her from drinking and using.

Jennifer sent her eldest child—five-years-old at the time—to stay with extended family in a neighboring state, but keeping her infant child with her, she knew it wouldn't be long before the Department of Human Services (DHS) would be looking for her.

Reality struck in the fall of 2017 when she was pulled over, charged with possession, and had the custody of her children revoked. It was at this point Jennifer knew she had to decide if she was going to make a change.

She was then connected to one of UWECI's funded community partners, Area Substance Abuse Council (ASAC), and was placed in their Heart of Iowa program. Heart of Iowa addresses the counseling needs of women who are expecting or currently have children and are experiencing substance use issues. This particular program is supported by UWECI's Women United; whose mission is to bring together funds and resources in our community to support the well-being of women in need.

Heart of Iowa provides classes such as parenting and money management in addition to treatment groups. After two weeks in the program, Jennifer was reunited with both of her children and was dedicated to bettering her life. With the help of UWECI's partner organization, Jennifer was able to land a job, start paying off debts, get her license back, and learn how to be a strong and devoted parent again.

"None of this would be possible without everything I was given through United Way [of East Central Iowa] and Heart of Iowa," said Jennifer. "There's no way I would be where I am today. I'm truly grateful."

Jennifer has been clean for more than a year and a half, is now a sponsor, and leads a meeting for her home group once a week. She is also maintaining a full-time job and truly loves being a mother to her children.

When donations are made to UWECI, they're helping create lasting change in the lives of people in our community—people like Jennifer. And when the people in our community thrive, our community thrives.



# WOMEN UNITED EVENTS

## Women United Luncheon

Women United Leadership Society held their annual luncheon on Wednesday, May 22, 2019 at the Cedar Rapids Country Club. The program was an opportunity for our community to learn more about Women United's mission, successes of the past year, and its community partners.

The program was kicked off with Women United's 2018-2019 Chair, Kelly Lind-Daufeldt, who recapped another year of making a difference for local women and their families and then had the opportunity to interview a representative from each of Women United's three health partners

Each rep gave an overview of their agency and answered questions including how Women United funding helps their programs, what challenges they face, and where they see opportunity for growth. Many of the reps noted they are now able to fund patient care navigators and social workers who support all aspects of client success through coordinated care and planning.

Next, a guest speaker from ASAC's Heart of Iowa—Michaela—shared her story about being a woman in recovery. She expressed her gratitude to Heart of Iowa for helping her break her addictions, become more confident, and grow as a loving and dedicated mother. Michaela received a standing ovation after sharing her story, exclaiming she has been sober for more than 450 days.

Kelly then introduced the incoming Women United Chair, Jessica Horaney, who thanked everyone again for coming and paid tribute to the Women United steering committee and UWECI staff for planning the luncheon.



## Women United Power of the Purse

Women United hosted Power of the Purse on Thursday, Aug. 1 at the The Hall-Perrine Cancer Center at Mercy Medical Center. This event forwards Women United's mission by raising awareness and funds for local un- and under-insured women in our community who need access to healthcare services.

This year's Power of the Purse was a rousing success with:

- 150+ attendees bidding on 60+ purses
- A weekend stay at a cabin in Galena
- A game of heads or tails for a wine and whiskey wagon
- A raffle for a beautiful red Kate Spade purse and wallet
- **And a total of more than \$11,500 raised**

When women support each other, incredible things happen!

Learn more at [uweci.org/women](http://uweci.org/women)



UNITED WAY OF EAST CENTRAL IOWA  
**WOMEN UNITED**  
*women helping women*



# FY21 UWECEI

## Funding

### Education

#### **Big Brothers Big Sisters**

Executive Director: Linda Henecke  
3150 E Avenue NW, Suite 103  
Cedar Rapids, IA 52405  
319- 377-8993

The mission of Big Brothers Big Sisters is to build one-to-one relationships between children in need and adults which provide friendship and mentoring opportunities in an environment of trust, growth and support, and result in enhancing each child's positive development.

Funding: \$128,000

Strategy: **Building Resiliency & Improved Education**

Big Brothers Big Sisters creates and supports one-to-one mentoring relationships that ignite the power and promise of youth.

We support all youth in achieving their full potential. Youth are served through our Community-based and School-based programs.

The program makes meaningful differences in their lives in the areas of Education, Social Skills and Avoiding Risky Behaviors.

#### **Boys and Girls Club of Cedar Rapids**

Executive Director: John Tursi  
420 6th St SE, Ste 240, Cedar Rapids, IA 52401  
319- 363-5766

The Boys and Girls Club of Cedar Rapids provides affordable services, which promote individual and community well-being for people of all ages, race, and religious backgrounds, with special concern for the youth from disadvantaged circumstances, to develop the qualities needed to become responsible citizens and leaders.

Funding: \$82,000

Strategy: **Moving Kids from Good To Great**

BGCCR's primary after-school services are designed with a focus on youth from economically disadvantaged households so that they may gain and maintain the skill sets vital to succeeding in college, work and life in the 21st century. The Club works to instill a sense of competency, empowerment, usefulness and belonging in members through fun and diverse education programming. The Good to Great program will create a measured increase in academic growth among club members.

### **Hawkeye Area Community Action Program (HACAP)**

Executive Director: Jane Drapeaux  
1515 Hawkeye Drive  
Hiawatha, IA 52233  
319- 393-7811  
hacap.org

The mission of the agency is to help develop the skills necessary to become successful and build strong communities. Provides a continuum of care from meeting basic needs through food distribution, early childhood education, housing, and senior services.

Funding: \$153,000

Strategy: **Head Start/Early Head Start Wrap Around**

Head Start provides full day, full year, quality, developmentally appropriate childcare to low income children and families. The goals of Head Start are to enhance children's physical, social, emotional and cognitive development; to enable parents to be better caregivers and teachers to their children; and to help parents meet their own goals, including self-sufficiency.

### **Jane Boyd Community House**

Executive Director: Megan Isenberg  
943 14th Avenue SE  
Cedar Rapids, IA 52403  
319- 366-0431

Jane Boyd Community House is a community social service center dedicated to meeting the common needs of all people with whom it comes in contact. Common human needs are defined by Jane Boyd as those needs that relate to survival, education, constructive use of leisure time, problem solving and conflict resolution, striving for and maintenance of dignity, self-actualization and a sense of belonging.

Funding: \$189,000

Strategy: **Supporting Achievement**

Jane Boyd provides the Achievement Academy – an out-of-school program offered at two locations – the Jane Boyd Community House and Johnson STEAM Academy. The Achievement Academy creates purposeful connections to caring adults and helps youth develop a positive sense of self and are engaged in positive activities, such as academic enrichments, social emotional learning, and recreational activities.

### **Kids First Law Center**

Executive Director: Jenny Schulz  
420 6<sup>th</sup> St SE #160  
Cedar Rapids, IA 52401  
319- 365-5437

Kids First is a mission-driven organization that seeks to mitigate the negative effects of divorce on children.

Funding: \$50,000  
Strategy: **Building Hope through Child Advocacy**

Kids First builds hope and creates long-term change by providing legal representation for at-risk children in high-conflict custody and divorce cases. Kids First attorneys lessen children's exposure to family conflict, strengthen family relationships, connect kids to needed resources, and make children's voices heard.

Funding: \$15,000  
Strategy: **Restorative Justice in our Schools**

This strategy serves children in the Cedar Rapids Community School District who are among the most at-risk for failing and dropping out of school. The Youth Peace Project uses restorative justice to resolve conflicts that arise between students or between students and teachers. Students develop social-emotional skills like managing emotions and listening to others' perspectives to help them build positive relationships.

### **Kids on Course**

Executive Director: Jenny Becker  
PO Box 2336  
Cedar Rapids, IA 52401  
319- 573-8714

Kids on Course is a nonprofit program of the Zach Johnson Foundation, in cooperation with the Cedar Rapids Community School District. Kids on Course provides tutoring, enrichment, parent engagement strategies and health supports to put students on course to graduate college. Each child reaches his or her academic and individual potential through creative and inventive opportunities that connect students and families to the community, schools, and higher learning.

Funding: \$82,000  
Strategy: **Closing the Academic Achievement Gap**

Kids on Course addresses the academic achievement and opportunity gaps that impact children living in or near poverty. The KOC program uses practices that have a track record of moving low-income students forward academically. The program proves its impact working in partnership with the school district and state-level data generated from evidence-based third-party sources.

### **Waypoint Services**

Executive Director: Jaye Kennedy  
318 5th Street SE, Cedar Rapids, IA 52401  
319- 365-1458

Waypoint is a non-profit organization committed to enriching the lives and addressing the needs, issues and concerns of women and their families. Waypoint provides shelter and support



for those in crisis due to homelessness, poverty, domestic violence or sexual assault.

Funding: \$105,000

Strategy: **Quality Programming - Education**

Financial assistance for low-income families so they can access affordable, quality childcare.

### **Young Parents Network (YPN)**

Executive Director: Alejandro Pino

420 6<sup>th</sup> St. SE, Ste. #260

Cedar Rapids, IA 52401

319- 364-8909

This agency is dedicated to adolescent pregnancy prevention and prenatal and parent education. The agency's mission is to empower and strengthen teens, young adults and young families through the development of basic life skills. Both individual and group sessions are available for those in need.

Funding: \$166,000

Strategy: **Building Bright Futures**

Young Parents Network's (YPN) primary services are group meetings and home visitation, which incorporate early childhood education, prenatal and parenting education, and family support. Programs promote life skills, improve personal accountability and decision making, and increase confidence and competence in parenting skills.

### **YouthPort (Boys and Girls Club, Tanager Place, and Young Parents Network)**

Executive Director: John Tursi, Okpara Rice, Alejandro Pino

2309 C Street SW

Cedar Rapids, IA 52404

319- 365-9165

youthport.org

The mission of the organization is to provide a safe harbor for families and neighborhoods guiding and supporting for a better community. Works to develop a model of outreach that can be replicated in high risk neighborhoods to provide services to children and families from conception to age 27.

Funding: \$20,000

Strategy: **LGBTQ**

The LGBTQ (Lesbian, Gay, Bisexual, Transgender and Questioning) Youth Center is a confidential and safe environment outside of school where LGBTQ youth can receive support and resources.

## Financial Stability

### Catherine McAuley Center

Executive Director: Paula Land  
866 4th Avenue SE  
Cedar Rapids, IA 52403  
319- 363-4993

The Catherine McAuley Center, founded by the Sisters of Mercy, promotes the well-being and dignity of individuals in need by providing basic education for adults and transitional housing program for women.

Funding: \$61,000

Strategy: **Refugee and Immigrant Education Services**

Provides free one-on-one tutoring to adults who are English Language Learners (ELL), studying for the US citizenship test, and/or striving to improve basic reading and math skills. Supplemental services include an Immigrant/Refugee Coordinator (I/RC) who provides case management services for students, a food pantry and free bus passes to help clients meet basic needs and free childcare for students while they receive tutoring. The program also offers a biannual six-week citizenship class and an annual four-week banking class.

Funding: \$56,000

Strategy: **Stability, Housing and Wellbeing for Women**

Assists homeless women age 18 and over without children in their care, providing them with transitional housing, programming and case management and aftercare services.

### Goodwill Industries of the Heartland

Executive Director: Pat Airy  
1441 Blairs Ferry Road NE  
Cedar Rapids, IA 52402  
319- 393-3434

Goodwill Industries strives to advance the social and economic independence of men and women with disabilities and other persons who may experience barriers to such independence. To achieve this purpose, Goodwill provides a variety of training, employment, and support services.

Funding: \$60,000

Strategy: **Employment Training and Placement Services**

Goodwill of the Heartland provides soft skills training, computer literacy training, on the job training that leads to industry recognized certifications and job placement and retention services to those with barriers to entering the workforce.

## Hawkeye Area Community Action Program (HACAP)

Executive Director: Jane Drapeaux  
1515 Hawkeye Drive  
Hiawatha, IA 52233  
319- 393-7811  
hacap.org

The mission of the agency is to help develop the skills necessary to become successful and build strong communities. Provides a continuum of care from meeting basic needs through food distribution, early childhood education, housing, and senior services.

Funding: \$70,000

Strategy: **Food Reservoir Program**

HACAP Food Reservoir leads the fight against hunger in East Central Iowa by providing food access, advocacy, education, and disaster response. The Food Reservoir provides food to more than 160 community partners across 7 counties. With help from our communities, we can make food security a reality for every household in East Central Iowa.

Funding: \$50,000

Strategy: **Achieving Housing Stability**

Transitional housing, supportive services and case management for low-income families including, teaching individuals and families how to obtain and retain permanent housing.

## Horizons, A Family Service Alliance

Executive Director: Mike Barnhart  
819 Fifth Street SE  
Cedar Rapids, IA 52401  
319- 398-3943  
horizonsfamily.org

The mission of the agency is to instill hope, change lives, and brighten futures by providing life-changing services to underserved populations. Provides client-centered, holistic services to increase clients' nutritional, mental, and financial health.

Funding: \$93,000

Strategy: **Access to Financial Stability**

Horizons provides financial/budget/credit counseling and coaching as well as classes and workshops. In addition, this program now includes a new program geared specifically towards Student Loan Counseling.

Funding,: \$84,000

Strategy: **Neighborhood Transportation Service, Inc. (NTS)  
Bridge to Employment**

NTS offers affordable night and weekend transportation to work, employment training, school, or life skills classes. It is the only transportation with a wheelchair lift available evenings and weekends. Door-to-door services are

provided within Cedar Rapids, Marion, and Hiawatha. The primary service and purpose of NTS is to pick riders up by appointment and deliver them to work or school. NTS provides service at night from 6:30 PM to 6:00 AM and also on weekends. This fills the void left after the Cedar Rapids Transit buses and Linn County LIFTS are not in service.

### **Iowa Legal Aid**

Executive Director: Lisa Gavin  
317 7th Avenue Southeast #404  
Cedar Rapids, IA 52401  
319- 364-6108

Iowa Legal Aid strives to secure a full measure of justice in public and private affairs for low-income persons with an emphasis on legal problems involving basic necessities, fundamental rights or safety. The agency aims to improve the lives of people living in poverty by providing high quality legal services and empower clients with self-advocacy skills through legal education; and to treat all people with respect and dignity and work to dispel prevailing myths and misconceptions about low-income people.

Request: \$145,000

Strategy: **Family Financial and Housing Stability Project**

A multi-faceted approach to service delivery that includes direct legal assistance, community legal education and referrals to private attorneys participating in Iowa's Volunteer Lawyers Project.

### **Jane Boyd Community House**

Executive Director: Megan Isenberg  
943 14th Avenue SE  
Cedar Rapids, IA 52403  
319- 366-0431

Jane Boyd Community House is a community social service center dedicated to meeting the common needs of all people with whom it comes in contact. Common human needs are defined by Jane Boyd as those needs that relate to survival, education, constructive use of leisure time, problem solving and conflict resolution, striving for and maintenance of dignity, self-actualization and a sense of belonging.

Funding: \$30,000

Strategy: **Jane Boyd Community House-PATHS**

PATHS Program in an intensive program working to establish employment pathways for unemployed or underemployed adults by providing career readiness training to help participants gain marketable skills, references and internship experience. The participants also complete a series of learning modules in a classroom setting coupled with coaching and internship placement; with the goal to develop new skills to improve income potential.

### Waypoint Services

Executive Director: Jaye Kennedy  
318 5th Street SE  
Cedar Rapids, IA 52401  
319- 365-1458

Waypoint is a non-profit organization committed to enriching the lives and addressing the needs, issues and concerns of women and their families. Waypoint provides shelter and support for those in crisis due to homelessness, poverty, domestic violence or sexual assault.

Funding: \$300,000

Strategy: **System of Support for At-Risk Households**

Coordinated intake and case management services for homeless and near homeless families to stabilize housing. Waypoint also addresses domestic violence victim services, shelter services for women and families with children, and a rapid rehousing program. Through the work with coordinated intake and staffed housing navigators, Waypoint also works to bridge the gap between landlords and potential tenants through their Tenant Academy Program, which helps tenants better understand their rights and what it means to be a good tenant.

### Willis Dady Emergency Shelter

Executive Director: Phoebe Trepp  
1247 4th Avenue SE  
Cedar Rapids, IA 52403  
319-362-7555

The mission of the Willis Dady Shelter is to provide immediate shelter to homeless single men and families in a safe, clean and caring atmosphere that promotes progress toward ending the cycle of homelessness.

Request: \$93,000

Strategy: **Preventing and Ending Homelessness**

Shelter services for single men, and case management for shelter clients.

## Health

### Aging Services, Inc.

Executive Director: Lindsay Glynn  
317 7th Avenue Southeast #302  
Cedar Rapids, IA 52401  
319- 398-3644  
abbealth.org

The mission of the agency is to enhance the lives of older adults by providing services and resources to assist them in remaining independent. Provide services that maintain, integrate, and enhance the lives of seniors in the community through assessment and intervention, adult day care and respite, in-home respite, home safety and maintenance, and volunteer services.

Funding: \$350,000

Strategy: **Supporting Independence for Older Adults**

A comprehensive array of quality home and community based services designed to support older adults in their ability to continue living independently and to avoid unnecessary or premature nursing home placement.

### Area Substance Abuse Council (ASAC)

Executive Director: Jeannette Archer-Simons  
3601 16th Avenue SW  
Cedar Rapids, IA 52404  
319- 390-4611  
asac.us

The mission of the agency is to help individuals, families, workplaces and communities prevent, treat and recover from substance misuse and abuse. The services provided follow the continuum of care beginning with prevention, assessment, intervention through the various levels of treatment.

Funding: \$293,000

Strategy: **Treating and Supporting Recovery**

Provide substance abuse assessment; intake, extended outpatient; intensive outpatient; and residential treatment services. Three residential programs in Cedar Rapids for adults through the Recovery Center, CD+ for youth ages 13-18, and Heart of Iowa for women with children or who are pregnant.

Funding: \$57,000

Strategy: **Preventing Substance Abuse**

Provides comprehensive prevention strategies focused on youth and young adults age 9-24 with schools; businesses; local governments; and community groups. Services include assessment, education, environmental strategies, community coalition building, workplace services to reduce the underage use and abuse of alcohol, the misuse of prescription medicines, and the use of nicotine products and illegal drugs.

### **Benton County Volunteer Program (BCVP)**

Executive Director: Sheila Hlas

1309 5<sup>th</sup> Avenue

Belle Plaine, IA 52208

319- 434-6078

bentoncountyvolunteers-ia.com

The mission of the agency is to seek to enhance the quality of life for the people of Benton County with emphasis on the disadvantaged and senior citizens of our county.

Funding: \$10,000

Strategy: **Medical Transportation and Food Assistance**

The BCVP provides a Medical Transportation Assistance program; food distribution program consisting of affordable, locally delivered, and nutritious food; human services collaborations to address various basic needs; and volunteer engagement opportunities.

### **Foundation 2**

Executive Director: Emily Blomme

1714 Johnson Avenue NW

Cedar Rapids, IA 52405

319- 362-1170

foundation2.org

The mission of the agency is to be a trusted, compassionate resource for people in crisis offering counseling, safety, and support during difficult times. Provides a continuum of service for all people experiencing crisis in our community that include a 24-hour crisis line; chat and text; mobile crisis outreach; independent living program; support groups; and therapy.

Funding: \$360,000

Strategy: **Crisis Intervention and Response**

Provide behavioral and mental health crisis intervention and response to individuals, youth and families by increasing access to affordable mental health services through phone crisis counseling, text or chat; walk-in crisis counseling, emergency youth shelter stays, individual/family counseling; suicide assessments and safety planning; and follow up.

### **Hawkeye Area Community Action Program (HACAP)**

Executive Director: Jane Drapeaux

1515 Hawkeye Drive

Hiawatha, IA 52233

319- 393-7811

hacap.org

The mission of the agency is to help develop the skills necessary to become successful and build strong communities. Provides a continuum of care from meeting basic needs through food distribution, early childhood education, housing, and senior services.

Funding: \$35,000

Strategy: **Rural Senior Services**

HACAP's Rural Senior Services provides home and community-based care and caregiver supports to the rural community in Benton Co. including: home delivered meals, center based dining (currently using the carry-out style meal service), chore services, and medical equipment lending closet in order to support older adults to remain in their home independently.

### **Horizons, A Family Service Alliance**

Executive Director: Mike Barnhart  
819 Fifth Street SE  
Cedar Rapids, IA 52401  
319- 398-3943  
horizonsfamily.org

The mission of the agency is to instill hope, change lives, and brighten futures by providing life-changing services to underserved populations. Provides client-centered, holistic services to increase clients' nutritional, mental, and financial health.

Funding: \$83,000

Strategy: **Healthy Horizons for Older Adults**

Meals On Wheels provides hot, fresh, and often local food seven days per week to homebound elderly and congregate dining sites. Provides customizable nutrition plans and counseling; ensures safety, wellness, and emotional and social support with volunteers to help seniors to live independently and age in place.

### **Rural Employment Alternatives, Inc. (REA)**

Executive Director: Jeannine Scandridge  
495 4<sup>th</sup> Avenue  
Conroy, IA 52220  
319- 662-4043

The mission of the agency is to empower each person to identify possibilities, become self-advocates and achieve their dreams. REA, Inc. provides day habilitation services to individuals with disabilities including various skill building, education, and engagement in and promotion of health and wellness.

Funding: \$30,000

Strategy: **Community Based Experiences- Wellness**

Provides community based day habilitation services in the Iowa county area to individuals living with intellectual, physical and mental health disabilities to increase independence and socialization, improve quality of life and help individuals remain in the community.

### **The Arc of East Central Iowa**

Acting Executive Director: Kyle Schramp  
680 2nd Street SE  
Cedar Rapids, IA 52401



319- 365-0487  
arceci.org

The agency mission is to empower people with intellectual and related disabilities to engage in lifelong opportunities to live, learn, work and play with dignity, freedom and full inclusion in their communities. The Arc provides advocacy and services for people with intellectual and developmental disabilities, brain injury, mental health diagnosis and/or the elderly.

Funding: \$100,000

Strategy: **Access to Disability Supports and Programming**

The Arc provides support services that increase and sustain a family's ability to remain effective as the primary care giving unit. Services include respite care, supported community living, day habilitation, habilitation, year-round daycare, after-work/school care, mentoring, and referral and navigation of systems and advocacy.

### **Unity Point Health – St. Luke's Dental Health Center**

Executive Director: Dr. Ritu Bansal

855 A Avenue NE, Suite #105

Cedar Rapids, IA 52402

319- 369-7716

[unitypoint.org/cedarrapids/services-dental-health-center.aspx](http://unitypoint.org/cedarrapids/services-dental-health-center.aspx)

The organization mission is to give the healthcare we'd like our loved ones to receive. The Dental Health Center provides quality, comprehensive and preventative dental treatments for low-income children and developmentally disabled children and adults.

Funding: \$80,000

Strategy: **Prevention and Early Outreach Program**

The program conducts school-based outreach to low income children for dental screenings, referrals, fluoride varnish, dental sealants, and follow up care coordination for children with additional dental needs and/or children with no dental home.

### **YouthPort (Boys and Girls Club, Tanager Place, and Young Parents Network)**

Executive Director: John Tursi, Okpara Rice, Alejandro Pino

2309 C Street SW

Cedar Rapids, IA 52404

319- 365-9165

[youthport.org](http://youthport.org)

The mission of the organization is to provide a safe harbor for families and neighborhoods guiding and supporting for a better community. Works to develop a model of outreach that can be replicated in high risk neighborhoods to provide services to children and families from conception to age 27.

Funding: \$50,000

Strategy: **School-Based Program**

YouthPort will work with Tanager Place to assess serious mental, social, and physical health needs and address the consequences of children dealing with Adverse Childhood Experiences (ACEs) and other mental health challenges. Program will provide therapists to help mitigate the effect of ACEs and trauma by placing mental health professionals in the school system to work with students, teachers, and administration to encourage resiliency, create awareness, promote academic success, and eliminate barriers for access to care for students and families.

### **Southeast Linn Community Center**

Executive Director: Nicole McAlexander  
108 S. Washington St.  
Lisbon, IA, 52253  
319- 455-2844  
selinn.org

The mission of the organization is to provide a safe harbor for families and neighborhoods guiding and supporting for a better community. Works to develop a model of outreach that can be replicated in high risk neighborhoods to provide services to children and families from conception to age 27.

Funding: \$10,000

Strategy: **Community Programming**

SELCC serve community members of all ages and backgrounds by providing for basic needs, helping them live independently, and enriching their daily life. They utilizes community partners to improve food access for those in Mt. Vernon/Lisbon area

### **Volunteer Services of Cedar County**

Executive Director: Lynda Hansen  
Tipton, Iowa  
563-357-8690

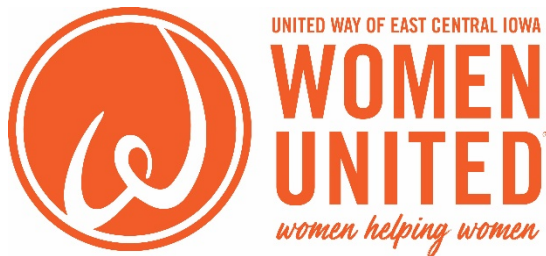
Volunteer Services provides personalized transportation for frail and elderly adults in Cedar County. Their service allows individuals to remain in their home as long as it is safe and is in their best interest.

Funding: \$10,000

Strategy:

Volunteer Services provides personalized transportation for frail and elderly adults in Cedar County. Their service allows individuals to remain in their home as long as it is safe and is in their best interest.

## Women United Investments



Women Leaders dollars are used to address the health needs of low-income women in our community. Each partner must address the following criteria:

- Increase affordability and reduce barriers to access
- Improve utilization of health care systems
- Improve mental health, navigation and care coordination

### Funded services

- Prescription assistance
- Dental care
- Medical co-pays
- Vision care
- Durable medical supplies
- Education
- HPV Vaccinations
- Mental health screening, navigation and care coordination

### Healthcare Needs Partners

#### Eastern Iowa Health Center

Executive Director: Joe Lock  
1201 3<sup>rd</sup> Avenue SE  
Cedar Rapids, IA 52403  
319- 730-7300

Eastern Iowa Health Center is a FQHC-deemed Federally Qualified Health Center with a mission to provide a medical home by offering patient-focused, quality comprehensive primary healthcare services to members of our community, regardless of ability to pay.

Funding: \$58,287

Strategy: **Unmet Needs**

EIHC will provide prescription assistance, diabetic supplies, co-pay and cost assistance, transportation, and diabetes education for women.

Funding: \$50,000

Strategy: **Mental Health Navigation & Care Coordination**

EIHC will provide medical screening and assessment of needs to women being served and provide prevention and early intervention to reduce the

level of crisis, stress, or depression, and/or anxiety. Focus is on improving social connectedness that improves functioning and builds resiliency

### **Community Health Free Clinic**

Executive Officer: Darlene Schmidt  
947 14<sup>th</sup> Avenue SE  
Cedar Rapids, IA 52401  
319- 363-0416

Community Health Free Clinic is dedicated to providing a medical home for the uninsured and under-served in the Cedar Rapids and surrounding Linn County.

Funding: \$51,897

Strategy: **Unmet Needs**

CHFC provides free medical, dental, vision and prescription services for those without access to or the ability to pay for healthcare in our community.

Funding: \$25,000

Strategy: **Mental Health Navigation & Care Coordination**

CHFC provides screening and assessment of needs to women being served and provides prevention, early intervention, and connection to medical homes with follow-up to improve utilization of services. Focus is on improving medical outcomes by connecting women with a medical home to maintain consistent care.

### **Area Substance Abuse Council (ASAC)**

Executive Director: Melissa Walker  
3601 16th Avenue SW  
Cedar Rapids, IA 52404  
319- 390-4611

ASAC is licensed to provide comprehensive prevention and treatment services to combat the abuse of alcohol, tobacco and other drugs. The services provided follow the continuum of care beginning with prevention, intervention, assessment, then the various levels of treatment.

Funding: \$50,000

Funded Strategy: **Mental Health Navigation & Care Coordination**

Prevention and treatment strategies that will remove barriers to treatment for women transitioning to community supports at Heart of Iowa. Focus is on improving mental health functioning of women and increasing social connectedness that improves functioning and builds resiliency.



United Way  
of East Central Iowa

# Volunteer Engagement

## Fact Sheet

### Mission

Bring people together to improve lives and strengthen communities through volunteering.

### Vision

United Way of East Central Iowa strives to be the area's central resource for connecting, promoting and educating people on the importance of volunteerism.

### INDIVIDUAL ENGAGEMENT

Provide a menu of volunteer options that engage individuals throughout their lifespan including done in a day, ongoing and skills-based opportunities.

- **55+ Initiative:** Connects volunteers, 55 and better, with meaningful and impactful volunteer opportunities in our community. This initiative offers one-on-one volunteer placement for individuals interested in sharing their experience, leadership and skills.
- **Volunteer Now:** UWECI's online volunteer matching site that provides a one-stop-shop to help individuals find volunteer opportunities in East Central Iowa.
- **Jones County Volunteer Center:** Engages individuals of all ages in volunteer services to meet critical community needs. Volunteers provide direct service programs such as Senior Health Insurance Information Program (SHIIP), Elderly Outreach Assisted Transportation program and the Volunteer Income Tax Assistance (VITA) program from the Anamosa office.
- **Rural Community Engagement:** Supported by UWECI funding to direct service programs in Benton, Cedar and Iowa Counties. Benton and Cedar counties have established volunteer programs that are included when trying to connect volunteers.
- **Disaster Volunteer Response:** Coordinated through LAP-AID with UWECI's leadership. This collaborative strategy allows United Way to maximize human resources in preparing, responding and recovering from a disaster.
- **UWECI Signature Volunteer Opportunities:**
  - Volunteer Income Tax Assistance (VITA) program where volunteers prepare taxes for low to moderate income families
  - Volunteer in Proficiency (VIP) where volunteers read to elementary age kids to increase their proficiency in reading.
- **UWECI Internal Volunteers:** Connects over 200 skilled individuals to create positive change in our community. Volunteers serve in a variety of capacities on boards, committees, interns, and administrative support to help deliver United Way's mission.

## CORPORATE ENGAGEMENT

Leverage our employee relationships to empower companies to create year-round community engagement and foster a culture of volunteerism.

- **Day of Caring:** The largest organized done in a day volunteer event in Cedar Rapids with more than 1,300 volunteers serving nonprofits. Day of Caring promotes the spirit and value of volunteerism, increases the awareness of local human service agencies, and demonstrates the impact individuals make when working together.
- **Corporate Volunteer Projects:** Connects companies to volunteer projects with local nonprofits.
- **Volunteer Recognition:** Provides recognition for companies and employees at an annual volunteer recognition event and connects companies to other state-wide recognition activities.
- **Workplace Volunteer Council:** Connects social-minded companies to the council to help them establish, grow and sustain successful Workplace Volunteer Programs.
- **BOLD:** Board Orientation and Leadership Development (BOLD) provides an opportunity for individuals to learn more about board service, receive training and find organizations with board or committee opportunities that match their skills.
- **Onsite Volunteer Projects:** UWEI provides onsite volunteer projects assembling hygiene or literacy kits. The kits are distributed to partners throughout our community.

## NONPROFIT SUPPORT

Build capacity of nonprofits to increase the number volunteers and create a quality positive experience.

- **Service Enterprise Initiative:** An organization change management program that provides classroom training, consulting, and coaching to help nonprofits strategically engage and more effectively work with volunteers to deliver their social mission.
- **Volunteer Management Training:** Provides local in-person opportunities in a classroom or 1-on-1 format and a virtual training through the Volunteer Centers of Iowa Volunteer Management Training Webinars.
- **Day of Caring:** The largest one-day volunteer event in Cedar Rapids that increases the awareness of local human service agencies and demonstrates the impact individuals make when working together.
- **Days of Impact and Days of Service:** Provides opportunities for agencies to engage the community in smaller done in a day projects that are more impactful.
- **Volunteer Recognition:** Connects organizations to local and national awards and recognition events to spotlight volunteers in our community for their service.
- **Volunteer Now:** A web-based software that helps nonprofits recruit, communicate and connect to potential volunteers.
- **Volunteerism Awareness:** Achieved by UWEI sharing stories and volunteer impact through newsletters, social media, campaign materials, speaking engagements and additional strategies.

## SNAPSHOT OF VOLUNTEER ENGAGEMENT WITHIN UNITED WAY'S FOCUS AREAS

	FY14	FY15	FY16	FY17	FY18	FY19
<b>EDUCATION</b>						
<b>Volunteers</b>	<b>199</b>	<b>214</b>	<b>341</b>	<b>216</b>	<b>333</b>	<b>337</b>
Hours	7,606	9,484	5,900	4,447	6,371	3,494
Value	\$171,515	\$218,796	\$139,004	\$ 107,351	\$162,015	\$88,852
<b>FINANCIAL STABILITY</b>						
<b>Volunteers</b>	<b>333</b>	<b>599</b>	<b>484</b>	<b>463</b>	<b>657</b>	<b>764</b>
Hours	8,074	12,067	10,608	10,409	10,846	9,652
Value	\$182,069	\$278,386	\$249,924	\$ 251,273	\$275,814	\$245,450
<b>HEALTH</b>						
<b>Volunteers</b>	<b>202</b>	<b>184</b>	<b>456</b>	<b>258</b>	<b>264</b>	<b>285</b>
Hours	13,578	15,251	19,177	20,533	15,542	15,240
Value	\$306,184	\$351,841	\$451,810	\$ 495,666	\$395,233	\$387,553
<b>FOCUS AREA TOTAL</b>						
<b>Volunteers</b>	<b>734</b>	<b>997</b>	<b>1,281</b>	<b>937</b>	<b>1,254</b>	<b>1,386</b>
Hours	29,258	36,802	35,685	35,389	32,759	28,386
Value	\$659,768	\$849,022	\$840,739	\$ 854,290	\$833,061	\$721,855

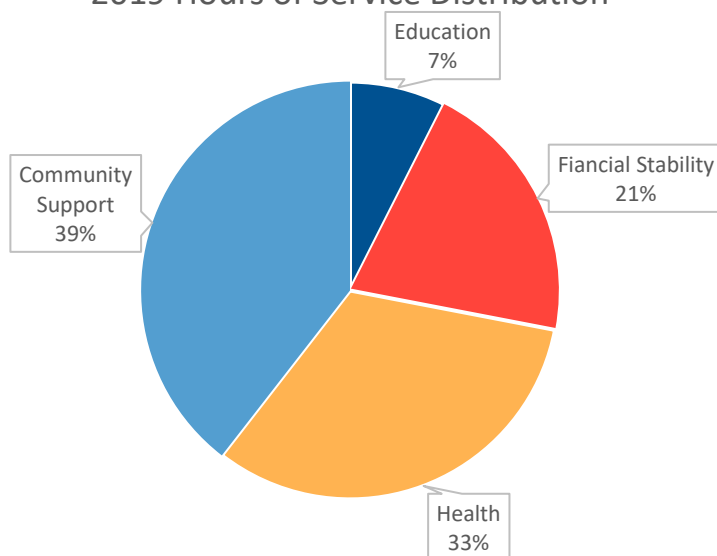
### History

	2008	2012	2019
Day of Caring, Day of Service, Day of Impact, Kit-Building Projects	950	1,779	1,856
<b>Total Volunteers</b> (unduplicated)	<b>1,121</b>	<b>2,469</b>	<b>3,269</b>

*Flood 2008-2010: 7,649 Vols.*

*RAGBRAI 2012: 756 Vols.*

2019 Hours of Service Distribution



## STAFF AND VOLUNTEER LEADERSHIP

### Volunteer Engagement Staff

- Angelica Vannatta, Senior Manager, Volunteer Engagement
- Amy Keltner, Coordinator, Jones County Volunteer Center in Anamosa
- Kayla Paulson, Senior Coordinator, 55+ Initiative and Service Enterprise

### Workplace Volunteer Council

The Workplace Volunteer Council helps businesses establish, grow and sustain successful employee volunteer programs that impact and improve the community through volunteering.

### Jones County Volunteer Center Advisory Council

The Jones County Volunteer Center's (JCVC) mission is to engage people of all ages in volunteer services to meet critical community needs that impact and benefit citizens of Jones County while providing a high-quality experience that will enrich the life of the volunteer. The JCVC volunteers provide services such as Elderly Outreach Assisted Transportation Program; Senior Health Insurance Information Program (SHIIP); Volunteer Income Tax Assistance (VITA) program and Jones County Food Bank Assistance.

### Service Enterprise

The Service Enterprise Initiative provides training, coaching, and empowers nonprofits to strategically engage volunteers utilizing their time and skills to address community needs. This strategy helps build the capacity of local nonprofits to more effectively leverage volunteers and their skills to deliver the mission of the organization.

### Boomer Engagement Design Team

Helps synthesize focus group insights and determine what is within the scope that UW Boomer Engagement is uniquely qualified or well-positioned to do. The Design team will shape UW's Boomer Engagement by developing and piloting strategies to engage pre-retirees and retirees.





# LAP-AID

LINN AREA PARTNERS ACTIVE IN DISASTER

## WHAT IS LAP-AID?

Linn Area Partners Active in Disaster (LAP-AID) brings together more than 30 local health and human service providers, government agencies, funding sources, and faith-based organizations. LAP-AID builds a better-prepared and more resilient Linn County by reducing duplicated services and inefficiencies during disasters. Their goal is to empower communities, expedite response, improve management of volunteers and donations, and provide resources for long-term recovery.

## HISTORY

LAP-AID formed as a response to the 2008 flood. More than 70 organizations brought approximately \$20.5 million in resources and services to Linn County. Following 2008, LAP-AID:

- Coordinated 639 construction jobs
- Provided \$1,296,001 in rebuild funding
- Helped 1,400 households receive \$3,581,788 in Unmet Needs Grants
- Coordinated more than 664,756 hours of volunteer service, valued at \$13,295,120, with Volunteer Reception Team and others
- Along with the Community Recovery Center and others, used Emergency Public Jobs Program to hire workers, creating jobs that generated more than \$500,000



## RESPONSE TEAMS PROVIDE AID IN TIMES OF NEED:

- Animal care
- Case advocacy/needs assessment
- Child care and children's services
- Communication
- Data management
- Information and referral
- Mass care

## Timeline

### 2013

- Disaster Volunteer Coordination Team activated during Central City flooding

### 2014

- LAP-AID activated due to flash flooding in Linn County and high winds in Benton County
- Disaster Volunteer Coordination Team fulfilled storm clean-up needs
- Community organizations provided funding for case management; a partner agency coordinated these efforts
- 42 volunteers provided 170 hours

### 2016

- Cedar Rapids floods activated LAP-AID and Disaster Volunteer Coordination Team
- 2-1-1 served as community information and referral source
- Provided mental health support at shelters
- Introduced Legal Aid app
- Provided support at the EOC and City Incident Command Center
- Used special needs sheltering strategies
- Accomplished joint planning for transportation needs
- 263 volunteers provided 2,178 hours

### 2017

- Disaster Volunteer Coordination Team assisted recovery following Prairieburg tornado



- Medical service/Linn County Medical Reserve Corps
- Mental health
- Older adult/functional needs

- Disaster volunteer coordination
- Construction coordination
- Fundraising
- Interfaith spiritual care

## HOW DOES LAP-AID ACTIVATE?

During emergencies, the Linn County Emergency Management Agency (EMA) activates LAP-AID. EMA is the coordinating agency during disasters.

When not involved in response, LAP-AID prepares for emergencies by participating in training and response drills. LAP-AID members hold quarterly meetings and serve on state and national preparedness workgroups.

## FOUR PHASES OF DISASTER

- 1. MITIGATION:** Prevent hazards from developing into disasters or reduce disaster effects
- 2. PREPAREDNESS:** Change behavior to limit a disaster's impact
- 3. RESPONSE:** Mobilize necessary emergency services and first responders
- 4. RECOVERY:** Restore affected area to its previous state

## HOW TO GET INVOLVED

Organizations, businesses, and individuals can support LAP-AID by becoming members. There is no fee to become a member.

- LAP-AID is a communication network during disasters. For example, county response partners may identify a need like mental health support after a tornado. LAP-AID responds through the Mental Health Team comprised of local mental health agencies
- Faith-based organizations communicate with the Disaster Volunteer Coordination Team to assist households' needs
- Businesses offer post-disaster funding and volunteers. Resources assist impacted employees
- Individuals support teams such as Emergency Volunteer Centers

## CONTACT INFORMATION

### Disaster assistance

Call 2-1-1, toll free at 1-866-469-2211, or from any phone 319-739-4211.

### Membership questions

Contact LAP-AID at 319-398-5372. Visit [linndisasterinfo.com](http://linndisasterinfo.com) for a list of partnering agencies and more.

# **INDEX 5**

## **FINANCE & ADMINISTRATION**

# Finance & Administration

## Fact Sheet

### Volunteer and Staff Leadership

#### Finance & Audit Committee

2021 Chair and Board Treasurer

Nathan Van Genderen, Mercy Medical Center

#### Human Resources Advisory Committee

Suspended

#### Operations & Facilities Committee

2021 Chair

Ron Olson, Paulson Electric/PEC  
Communications

#### Resource Management Committee

2021 Chair

Pat Deignan, Community Volunteer

#### Finance and Administration Staff

President & CEO

CFO/VP of Finance and Administration

Sr. Coordinator, Accounting &

Advancement Services

Sr. Manager, Operations

Executive Assistant

Accounting Coordinator

Kristin Roberts

Sarah Peters

Open Position

Abbie Covenah

Andi Moore

Janelle White

### Purpose of the Finance and Administration Department

- Facilitate and monitor progress on achieving strategic plan goals (Operations)
- Ensure fiduciary responsibility of our donor funds (Finance)
- Provide human resource management and staff development (HR)
- Provide efficient and effective technology solutions (IT)
- Maintain maximum transparency and accountability

### Key Activities of the Finance and Administration

1. **Develop fiscal and risk management policies and procedures that demonstrate excellence in accountability to our donors and protect the assets of the organization.**
  - a. Prepare, review, and present detailed, accurate financial statements; as well as develop and oversee annual budget.
  - b. Comply with UWW Standards of Excellence and membership requirements.



- 2. Improve effectiveness and efficiency of the organization and its commitment to accountability and high ethical standards.**
  - a. Perform annual external audit and related tax forms as required.
  - b. Maintain effective internal controls.
- 3. Provide effective and efficient human resource programs and processes that align with the mission of the organization.**
  - a. Analyze organizational staffing needs for the future.
  - b. Promote and ensure continued staff development.
  - c. Administer fair compensation program.
- 4. Develop a comprehensive information system that supports United Way's mission and its work.**
  - a. Analyze technology needs and enhance training.
  - b. Review software and hardware to keep current with needs of the organization.
- 5. Work with all departments and work teams to ensure success in achieving strategic goals.**
- 6. Provide a safe, welcoming physical environment that is practical, accessible, and well-branded and represents United Way's mission.**



United Way  
of East Central Iowa

# Finance & Audit Committee

## Roster

### **Nathan Van Genderen, Chair**

Mercy Medical Center  
701 10<sup>th</sup> Street SE  
Cedar Rapids, IA 52403-1292  
319-398-6793  
nvangenderen@mercycare.org

### **Amanda Barnes**

Lil' Drug Store  
9300 Earhart Ln SW  
Cedar Rapids, IA  
abarnes@lildrugstore.com

### **Ryan Buresh**

CRST International  
201 1<sup>st</sup> St SE  
Cedar Rapids, IA 52401  
rburesh@crst.com

### **Deb Gertsen**

Cedar Rapids Bank & Trust  
500 1st Ave. NE, Suite 100  
Cedar Rapids, IA 52401  
319-743-7133  
dgertsen@crbt.com

### **Britni Gookin**

Crystal Group  
855 Metzger Drive  
Hiawatha, IA 52233  
319-378-1636  
Britni.gookin@crystalrugged.com

### **Salma Igram**

Cedar Graphics  
311 Parsons Drive  
Hiawatha, IA 52233  
319-393-3600  
sigram@cedargraphicsinc.com

### **Robb Loftsgard**

Bankers Trust  
201 1<sup>st</sup> St Se, Ste 1110  
Cedar Rapids, IA 52401  
rloftsgard@bankerstrust.com

### **Jim Sauter**

Hawkeye Ready-Mix, Inc.  
1340 Hawkeye Dr.  
Hiawatha, IA 52233  
319-395-7061  
jsauter@hawkeyereadymix.com

### **Emily Wright**

Transamerica  
4333 Edgewood Rd NE  
Cedar Rapids, IA 52402  
Emilymwright95@gmail.com

### **Sarah Peters (Staff)**

United Way of East Central Iowa  
317 7<sup>th</sup> Ave. SE, Suite 401  
Cedar Rapids, IA 52401  
319-398-5372 ext. 829  
sarah.peters@uweci.org

### **Kristin Roberts (Staff)**

United Way of East Central Iowa  
317 7<sup>th</sup> Ave. SE, Suite 401  
Cedar Rapids, IA 52401  
319-398-5372 ext. 826  
kristin.roberts@uweci.org



United Way  
of East Central Iowa



# Operations & Facilities Committee Roster

**Ron Olson, Chair**

Paulson Electric/PEC Communications  
3050 12th St. SW  
Cedar Rapids, IA 52404  
319-363-3548  
rolson@paulsonelectric.com

**Bruce Anderson**

59 4th Street North  
Central City, IA 52214  
319-373-4100  
banderson@nxtbank.net

**Jack Cosgrove**

4114 Hickory Hill Lane SE  
Cedar Rapids, IA 52403-3741  
319-365-4485  
jack834@mchsi.com

**Katie Harms**

OPN Architects  
200 5th Ave. SE, Ste 201  
Cedar Rapids, IA 52401  
319-363-6018  
kharms@opnarcitects.com

**Claude Howard, Jr.**

Mercy Medical Center  
701 10<sup>th</sup> Street SE  
Cedar Rapids, IA 52403-1292  
319-398-6462  
choward@mercyare.org

**Laura Hyer**

Bradley & Riley  
2007 1st Avenue SE  
Cedar Rapids, IA 52406  
319-363-0101  
lhayer@bradelyriley.com

**Robb Loftsgard**

Bankers Trust  
201 First St. SE, Ste 1100  
Cedar Rapids, IA 52401  
(319) 899-3920  
rloftsgard@bankerstrust.com

**Max Smith**

TrueNorth Companies  
500 1<sup>st</sup> St SE  
Cedar Rapids, IA 52401  
319-366-2723  
MSmith@truenorthcompanies.com

**Abbie Covenah (Staff)**

United Way of East Central Iowa  
317 7th Ave. SE, Suite 401  
Cedar Rapids, IA 52401  
(319) 398-5372 x827  
abbie.convenah@uweci.org

**Sarah Peters (Staff)**

United Way of East Central Iowa  
317 7th Ave. SE, Suite 401  
Cedar Rapids, IA 52401  
(319) 398-5372 x829  
sarah.peters@uweci.org

**Property Management:****Steve Dummermuth, Jr.**

(319) 896-3217  
steve.dummermuth@igdindustries.com



United Way  
of East Central Iowa

# Financial Oversight & Control

United Way of East Central Iowa assures contributors we hold ourselves to the highest standards of accountability, transparency, and professionalism in the stewardship of contributors and financial management.

Several safeguards are currently in place to ensure our level of financial oversight and controls are at an appropriate level. These include:

- An annual, independent audit, which reviews UWECI's compliance with FASB standards and adequacy of internal controls associated with financial management. Our most recent audit was completed, with an unqualified opinion by RSM and is available for review at our office or via mail upon request. Our annual audit is put out for bid at least every five years.
- A Finance and Administration Committee is overseen by our Board Treasurer, which is composed of finance professionals who regularly review and approve our financial statements and audit and oversee and determine the appropriateness of all financial matters related to UWECI.
- An Audit Committee Task Force assists the Board of Directors with oversight responsibilities and assesses the quality and integrity of the accounting and financial reporting practices and our internal controls.
- An annual compliance requirement with a set of comprehensive standards established by United Way of America for its member organizations. These standards include expectations for financial reporting, transparency of operations and business planning, cost-deduction rates and legal compliance. A copy of our most recent compliance certification is available for review upon request.
- A Policies and Procedures Handbook has been developed that includes comprehensive internal controls and policies and procedures for all aspects of UWECI's financial management.
- Filing of detailed financial information on an annual basis with the IRS.
- The use of accounting methods in compliance with standards set by the Financial Accounting Standards Board (FASB), an organization that recommends accounting standards for nonprofit organizations and for-profit businesses.
- Compliance with Sarbanes-Oxley requirements for nonprofits, including a document destruction policy and a whistle-blower policy; as well as other non-required policies, such as a policy prohibiting loans to staff and board leadership.

*For questions, please contact Sarah Peters, CFO/VP of Finance & Administration*



United Way  
of East Central Iowa

# Resource Management Committee Roster

**Pat Deignan, Chair**

Community Volunteer  
4024 Majestic Ct. NE  
Cedar Rapids, IA 52411  
319-431-7706  
deignanfam@gmail.com

**Deb Gertsen**

Cedar Rapids Bank and Trust  
500 1st Ave. NE  
Cedar Rapids, IA 52401  
319-743-7133  
dgertsen@crbt.com

**Rick Seger**

Cedar Rapids Bank and Trust  
500 1st Ave. NE  
Cedar Rapids, IA 52401  
319-743-7037  
dgertsen@crbt.com

**Sarah Peters (Staff)**

United Way of East Central Iowa  
317 7th Ave. SE, Suite 401  
Cedar Rapids, IA 52401  
319-398-5372 ext. 829  
sarah.peters@uweci.org



United Way  
of East Central Iowa

**INDEX 6**

**LABOR**

# AFL-CIO Community Services Liaison

## Fact Sheet

### **Volunteer and Staff Leadership**

#### **Hawkeye Area Labor Council**

Rick Moyle, Executive Director

#### **Labor Leadership Giving Society**

*2021 Labor Campaign*

Randy Sconyers, Chair

#### **AFL-CIO Community Services**

*Liaison Staff Member*

Jay Larson, United Way of East Central Iowa

### **Purpose of Community Services Liaison**

This position serves as a liaison between organized labor specifically the Hawkeye Area Labor Council, AFL-CIO, and United Way of East Central Iowa. Primary responsibilities include involving organized labor in the ongoing activities of the AFL-CIO Community Services program and United Way's annual campaign, building community relationships, and connecting families to health and human service organizations.

### **Key Activities of Community Services Liaison**

- Assist and support activities of the Hawkeye Area Labor Council, AFL-CIO.
  - Coordinate strike assistance and dislocated worker programs including food bank, utilization of 2-1-1, and other identified projects.
  - Encourage civic engagement and representation of union members in community organizations.
  - Provide education and information on services, programs, and issues to union members through their local unions.
- Lead annual campaign activities for unions and companies with bargaining units.
  - Work with Resource Development on fundraising activities including, but not limited to managing house and labor accounts, labor loaned executives, and reporting on labor campaign data.
  - Work with local labor unions to ensure success of labor campaigns, ex. local union endorsement letters, and labor leadership program.
- Work with the Research and Community Building departments to identify key issues and provide an organized labor perspective.



United Way  
of East Central Iowa

# A Lasting Partnership

In 1942, the National Congress of Industrial Organizations Committee for American and Allied War Relief, the United Nations Relief Committee of the American Federation of Labor, and the Community Chests and Councils (now United Way of America) signed an agreement to unite in collaborative fundraising and community development. This agreement helped encourage labor representation on boards and councils and recognized union members' contributions.

Four years later in 1946, United Way of America established the Department of Labor Participation. This joined United Way with labor, health, and welfare agencies in a cooperative, community effort to bring services and people together.

Today, United Way employs AFL–CIO Community Services Liaisons throughout the country. Local AFL–CIO Central Labor Councils select these representatives to serve both United Way and the Council. Union representatives participate in United Way activities, serve on committees, contribute to annual campaigns as part of the campaign leadership structure, and communicate to union members the importance of the campaign and the agencies involved. Union members also volunteer by working with health and human care agencies that serve their communities.

Currently, more than 200 AFL–CIO Community Services liaisons serve on the staff of state and local United Ways throughout the country. In our area, the Community Services Liaison serves as a contact between Hawkeye Labor Council, AFL–CIO, and United Way of East Central Iowa. The Hawkeye Area Labor Council has more than 40 affiliated Unions with members who support United Way.

Together, local Unions and United Way of East Central Iowa continue to impact the quality of the labor force and working families in our community.



United Way  
of East Central Iowa

# **INDEX 7**

## **MARKETING & COMMUNICATIONS**

# Marketing & Communications

## Fact Sheet

### Marketing & Communications Staff

- Shannon Hanson, Vice President, Marketing & Communications
- Myah McCoy, Multimedia Specialist
- Ashley Pudil, Content Specialist

### Marketing & Communications Purpose

The Marketing & Communications department works to promote United Way of East Central Iowa in its efforts to fight for the education, financial stability, and health of every person in our community. We institute a variety of year-round strategies (developing and organizing communication tools, materials, presentations, audience engagement activities, media coverage, etc.) for specific audiences to support and advance United Way's work.

### Marketing & Communications Key Activities

1. Promoting United Way and engaging the community including current and potential donors as well as the general public.
2. Developing and executing a comprehensive marketing and communications plan.
3. Showing donors how their dollars make an impact.
4. Raising awareness of key issues and UWECI's involvement.
5. Developing materials, communications, and products.
6. Defining, engaging, increasing, and monitoring audiences.

### Marketing & Communications Key Responsibilities

- Messaging
- Content production, both audio and visual
- Audience engagement
- Spreading United Way of East Central Iowa's story (See Ways to Advocate sheet.)



United Way  
of East Central Iowa



# UWECI Marketing & Communications

## Roles & Responsibilities

### **Shannon Hanson**

#### **Vice President, Marketing & Communications**

Marketing Project Management: Development and Conception

Strategic Planning

Budget

Community, Public, and Media Relations

Marketing/Communications Plans

Digital Strategy

Digital Statistic

Progress Reporting

Idea Generation

Media Buys

Events: Development, Conception, Coordination and Implementation

Brand Management

Other Duties as Assigned

Backup: Graphic Design, Editing, Social Media and Writing

### **Myah McCoy**

#### **Multimedia Specialist**

Graphic Design: Web and Print

Manage Printers: In and Out of House

Video

Website Updates

Social Media posts

Multimedia Support: PowerPoint, Prezi, etc.

Other Duties as Assigned

### **Ashley Pudil**

#### **Content Specialist**

Storytelling

Photography

E-Newsletter creation

Writing: Scripts, Speeches, Talking Points, Blog, Social Media Posts, News Releases,  
Marketing Materials, etc.

Editing

Proofreading

Data and Content Collection for Writing Projects

Backup: Website

Other Duties as Assigned



United Way  
of East Central Iowa

# Marketing & Communications

## Messages to Remember

### Four Things to Remember about UWECI

#### If you remember one thing, remember this:

Our credo: United Way of East Central Iowa fights for the education, financial stability, and health of every person in our community.

#### If you have time for a little more conversation, here are three things:

- United Way collaborates and convenes people and organizations who share passion, expertise, and resources needed to get things done in our community.
  - United Way has transitioned from a fundraising entity to a social-change organization of committed community problem solvers.
  - No matter the obstacles. No matter the odds. We surround a community's most critical problems and we work to create community change with our expertise in understanding those critical community issues.
- Education, financial stability, and health are pillars for creating a thriving community right here in East Central Iowa.
  - Focusing on these three key areas is crucial to creating results for families in our five-county area\* and turning the curve for our communities.
- Join us and more than 20 funded partners, hundreds of community advocates and thousands of volunteers as we fight for our community together.

It is important for you to build your own story about why you care about and advocate for UWECI causes and what it does in the community. If you would like assistance, feel free to contact Shannon Hanson, Vice President - Marketing & Communications at [shannon.hanson@uweci.org](mailto:shannon.hanson@uweci.org).

\* Our five county area includes: Benton, Cedar, Iowa, Jones, and Linn counties.

# Marketing & Communications

## Ways to Advocate

Signing up for, reading, and engaging online with UWECI newsletters, social media platforms and blogs to stay informed on what we fight for in our community is truly important for board members. Being engaged with us online helps you answer questions from the community about what we are currently doing to fight to turn the curve for those most vulnerable here.

Please take some time to like or follow us on social media, check out our website, and sign up for our newsletters. It is important to remain subscribed to these emails not only to stay up-to-date and informed on what we are doing in the community but to receive invitations to United Way events.

Below is a list where you can find other interesting ways to become even more educated on what UWECI is and does in the community.

### Website

[uweci.org](http://uweci.org)

### Social Media Platforms

Facebook

Instagram

Twitter

LinkedIn

Pinterest

Youtube – This is a great source for past videos on campaign, Day of Caring, volunteering, education on what UWECI is, etc.

### Newsletters

General - monthly

Nonprofit News - monthly

Volunteer - monthly

Young Leaders Society – quarterly

Women United – quarterly

### Other

We Fight For (report to constituents) – sent via mail or email 3 times per year

All our newsletters are produced in a third-party platform called HubSpot. Sometimes this communication can fall into the spam folder in your email inbox. If you feel like you are missing our newsletters, be sure to go into your spam folder and allow UWECI to send you email. If you have questions about this, please contact any member of the Marketing team.



United Way  
of East Central Iowa

**INDEX 8**

**APPENDIX**

# United Way of East Central Iowa

## Key Terms

<b>Account</b>	An organization or individual in the campaign.
<b>Account Number</b>	A distinct numerical code for each general ledger account.
<b>Account Volunteer</b>	The person responsible for contacting an organization for one or all of the following: corporate gift, CEO's personal gift, leadership giving campaign, employee campaign, and/or Loaned Executive support.
<b>Accountability (Fiscal)</b>	The responsibility of ensuring that each dollar raised is accounted for and well spent.
<b>Active Community Investors (ACI)</b>	A group, defined by United Way Worldwide, as those who contribute more than \$75,000 annually to United Way and participate heavily in community voluntarism.
<b>Administrative Costs</b>	Funds needed to carry out day-to-day functioning of the organization; public accountability; maintenance of facility; legal activity.
<b>Advocacy</b>	The act of supporting and championing a particular population or issue.
<b>Agency Tours or Site Visits</b>	Visits to selected agencies designed to offer an onsite education concerning how United Way dollars are used within an agency and how community services are delivered.
<b>Alexis de Tocqueville Society</b>	A national major gifts society, sponsored by United Way of America, with chapters in local United Ways across the country. Members of the Alexis de Tocqueville Society give annual gifts of at least \$10,000.
<b>Allocation</b>	Funds granted to an agency or program.
<b>Asset Mapping</b>	Identifying the existing capacities within a community; a positive approach to understanding community dynamics and issues.
<b>Average Gift</b>	Total gift from employees divided by the number of givers.
<b>Bill Direct or Direct Bill</b>	A pledge option in which the donor requests a billing statement from United Way and pays upon receipt of this bill.
<b>Brand Markets</b>	Areas in which United Way Worldwide branding guidelines have been piloted with and strictly adhered to for purposes of communicating about the local United Way.
<b>Broadening the Base</b>	The effort to spread responsibility of giving more widely to include markets or areas of the campaign with low giving levels.
<b>Budget</b>	A statement of the financial position of an independent entity for a specified current and/or future period of time based on planned expenditures during that period.

<b>Campaign</b>	A period, most commonly between early August and mid-December, when United Way conducts the majority of its fundraising efforts.
<b>Campaign Analysis</b>	Analysis of giving by division, section, unit, company, etc.
<b>Campaign Audit</b>	The verification of pledges and cash gifts to ensure campaign results are accurately tracked and reported.
<b>Campaign Cabinet</b>	The “Executive Committee” of the fundraising effort led by the Campaign Chair and including key leaders from the community.
<b>Campaign Case</b>	A concise statement of purpose and rationale for the campaign. This statement is refined annually to reflect changing needs.
<b>Campaign Costs</b>	The annual expenses of conducting a local campaign, including salaries, promotional materials, fixed office expenses, etc., that are directly related to campaign activity. Campaign costs should be kept separately from other overhead expenses.
<b>Campaign Materials</b>	Materials developed by the Marketing and Communications Department that are used to promote the annual campaign. These materials include a video, brochures, posters, pocket folders, pledge forms, etc.
<b>Campaign Timetable</b>	A chart outlining all necessary campaign responsibilities and actions required from the time the Campaign Chair is recruited to the post campaign analysis.
<b>Card Value</b>	The total current dollar value of each campaign giving account.
<b>Combined Federal Campaign (CFC)</b>	A federally regulated campaign that governs all fundraising by private voluntary agencies among federal employees and members of the armed forces at their places of employment or duty stations.
<b>Communications Calendar</b>	A communications plan developed by the Marketing & Communications Committee that identifies UWECL's target audiences, the tactics UWECL uses to reach those individuals/groups, and when those tactics are initiated throughout the year.
<b>Community Assessment</b>	The act of gathering data about community needs and assets through surveys, focus groups, and statistical techniques in order to define and address the most critical needs and maximize utilization of assets.
<b>Community Investment</b>	The system by which volunteers from the community review all programs requesting funds from the pool of available dollars. Volunteers recommend various levels of funding for each program based on program merit and community priority areas. Funding recommendations are made to the United Way Board of Directors for final approval.
<b>Community Outcomes</b>	Community-level indicators of progress made by groups of programs toward addressing a social issue.
<b>Company Campaign Chair/Coordinator/Manager</b>	The person selected to manage the United Way employee campaign within a given company or organization.
<b>Company Wide Campaign</b>	A plan for employee giving developed by a national firm and implemented at all of its local plants and offices. This effort relies upon local giving guidelines and materials.
<b>Constituency</b>	The people involved in or served by an organization.

<b>Continuous Payroll Deduction</b>	A pledge that automatically continues from year to year without requiring annual reaffirmations by the employee but providing the employee with the ability to stop, increase or decrease the pledge upon request. Works best when applied as a percentage of salary rather than a set amount.
<b>Corporate Gift</b>	An annual contribution made in the name of the firm or organization.
<b>Database</b>	A computer program designed to systematically capture information in electronic format for storage and analysis.
<b>Deferred Giving</b>	A form of giving in which the beneficiary organization receives the principal or corpus of the gift a considerable time after the decision to give was made by the donor - usually after his or her death.
<b>Deficit</b>	An excess of expenditure over revenue; the excess of obligations over resources.
<b>Dissemination</b>	Circulating information or data about a topic.
<b>Diversity</b>	In the broadest sense, diversity is the quality of being different or unique at the individual or group level. Diversity is also defined as valuing individuals without regard to race, religion, color, gender, ethnicity, nationality, sexual orientation, physical challenge, or age.
<b>Division</b>	A United Way grouping of campaign accounts according to similarities in their makeup. Such groupings are often based on size, trade, geographic location, or a combination of these factors.
<b>Donor Option or Donor Designation</b>	The process by which contributors to United Way's campaign may choose to direct their donations to eligible 501(c)(3) nonprofit organizations, generally health and human service agencies, whether or not they are a United Way member agency.
<b>Employee Goal</b>	An established dollar amount that represents the desired total contribution in an employee campaign; this amount should be based on a formula, which considers potential for growth.
<b>Final Report</b>	The reported results of an organization's completed campaign.
<b>Fiscal Year</b>	An accounting period of 12 months.
<b>Fleur de Lis Awards</b>	Annual awards given to communities that excel in de Tocqueville programs.
<b>Functional Accounting</b>	A practice which involves breaking out all object (line for line) expenses and revenues by programs and support functions; and distributing all revenue and expenditures to fundraising, management and general functions, and separately identifiable programs operated by an agency.
<b>Funding Cycle</b>	Period during which allocated dollars are paid out to funded organizations.
<b>General Campaign Goal</b>	The overall campaign goal established by the Campaign Cabinet and approved by the Board of Directors.
<b>Geocoding</b>	Matching the addresses within a database to their spatial coordinates.
<b>Geomapping</b>	Placing data about variables into a spatial display technology (GIS).

<b>GIS</b>	Geographic Information Systems, a technology that allows data to be displayed on a map, used in assessment, asset mapping and strategic planning, and for communicating complex information about relationships between variables.
<b>Giving Guide</b>	United Way's suggested standard for corporate and individual levels of giving based on the ability to give.
<b>Group Solicitation or Group Meeting</b>	A brief meeting, held on company time, at which groups of employees learn more about United Way through videos, special speakers, and United Way staff. Employees receive pledge cards and make informed giving decisions. Employees are usually asked to sign their pledge cards at the end of the meeting; usually lasts 20–30 minutes.
<b>Index</b>	A statistical construct that aggregates and standardizes variables for comparative analysis, used to prioritize indicators of interest for an issue or population.
<b>Indicator</b>	A variable that can be monitored and trended to determine whether the direction of change is positive or negative. Provides objective or perceptual measure of the trend for an issue.
<b>Intervention</b>	An action that is taken to address an issue or population by improving services; something that attempts to change current conditions.
<b>Kickoff</b>	The formal start of a campaign in a community through an event that receives community-wide attention.
<b>Labor Participation Committee</b>	A committee that includes leaders of organized labor and whose job it is to advise and participate in managing employee campaigns.
<b>Leadership Giving</b>	A separate campaign effort that approaches management personnel for special education and solicitation for gifts in excess of \$500.
<b>Loaned Executive (LE)</b>	An individual selected by a company or organization and assigned to work in the United Way campaign for a specified period of time. The Loaned Executive acts as an extension of the United Way staff and complements the staff and volunteers by ensuring quality customer service to all campaign accounts.
<b>Local de Tocqueville Award</b>	The highest award presented by a local Alexis de Tocqueville Society presented by the National Society to recognize an outstanding individual philanthropist and/or volunteer in their community.
<b>Mail Solicitation or Direct Mail</b>	A direct appeal made through the mail and normally used in selected small business and residential campaigns.
<b>Marketing &amp; Communications (M&amp;C) Committee</b>	A United Way volunteer committee that develops strategic direction for UWECL's marketing and communications efforts.
<b>Mean</b>	The average score, computed by summing individual scores and dividing by the number of scores.
<b>Median</b>	The score at which half of the remaining data points fall below and half fall above the score.
<b>Megagift</b>	Gifts from individuals starting at \$100,000.
<b>Metro Size</b>	A classification of United Way communities that sorts them according to the amounts they have raised.



<b>Million Dollar Roundtable</b>	Individuals who pledge to contribute \$1 million or more to their United Way during the course of 1–5 years.
<b>Mode</b>	The most commonly occurring score within a variable.
<b>National Corporate Leadership (NCL)</b>	In partnership with more than 136 major corporations and 1,400 individual United Ways, NCL provides expert advice and resources to strengthen corporate involvement in communities, assists corporations to continuously improve their company-wide United Way involvement, and provides United Ways with the knowledge needed to build local relationships with and support their NCL company locations.
<b>National de Tocqueville Award</b>	The highest award nominated by a local Alexis de Tocqueville Society presented by the National Society to recognize an outstanding individual philanthropist and/or volunteer whose impact is national in scope.
<b>National Professional Council (NPC)</b>	The NPC is an advisory body to UWW's President and CEO and consists of 60 United Way chief professional officers from across the nation. Like UWW's Board, there are representatives on NPC who are designated by each of the five regions of the United Way system.
<b>Needs Assessment</b>	A systematic examination of community needs designed to help decision-makers focus limited resources including time, money, personnel, and materials on specific, mutually accepted community objectives and activities.
<b>New Hires Program</b>	Enrolling new employees at the time of hire for a contribution to United Way through payroll deduction.
<b>New Message</b>	A message to easily explain United Way and what the organization does: United Way of East Central Iowa makes communities stronger by gathering information to identify our communities' most critical needs, raising money to support human service agencies in meeting those needs, and working with community groups to create new projects that help more people.
<b>New Money</b>	Funds raised in excess of card value.
<b>Non-Recurring Gift</b>	A contribution made to United Way for a single campaign as a result of special circumstances. In most cases, this gift is made in addition to a normal annual contribution. Also called one-time money.
<b>Outcome Measurement</b>	The regular, systematic tracking of the extent to which program participants experience benefits or changes intended. Outcome measurement helps United Ways and agencies create cross-functional alignment, increase effectiveness, develop strategies for community initiatives, and demonstrate results that bring United Way's brand to life.
<b>Pacesetter Campaign</b>	A campaign in a company that agrees to specialized advance preparation and solicitation designed to provide an example and build enthusiasm for the general community-wide campaign. Usually occurs June–August and provides significant dollars early in the campaign.
<b>Per Capita Gift</b>	The campaign measurement arrived at by dividing the total employee or corporate gift by the total number of employees at the company.
<b>Pilot</b>	A small-scale study designed to evaluate the efficacy of an intervention or approach that can be replicated by others if found to be valid.
<b>Planned Gifts</b>	A gift planning technique used by donors to give gifts of appreciated assets during their lifetime and beyond.

<b>Pledge</b>	A promise to make a contribution in installments during a specific period of time.
<b>Pledge Loss</b>	Uncollectable pledges usually as a result of employee turnover.
<b>Post-Campaign Critique</b>	The process through which the campaign is evaluated and suggestions for future improvements are formulated.
<b>Prospects</b>	Potential contributors to the campaign.
<b>Report Meeting</b>	A key campaign meeting held for the purpose of receiving reports and collections from all solicitors, companies, etc., in order to publicly announce the progress of the campaign and build enthusiasm for it.
<b>Reserve</b>	A planned fund balance that an agency builds and sets aside for future, generally unbudgeted, often emergency, needs of the organization.
<b>Solicitor</b>	A company campaign volunteer with responsibility for asking other employees for pledges to United Way or a person who assists the Campaign Chair and Campaign Cabinet by making CEO Calls.
<b>Special Events</b>	Public events to attract positive attention to the campaign, keep the public informed, and motivate volunteers.
<b>Special Targeted Initiatives</b>	Fundraising strategies targeted at segments of the donor and prospect pool such as Women's Initiatives, Young Leaders, etc.
<b>State of Caring Index</b>	This dynamic index measures the needs of Americans and the caring and compassion of the nation, as well as each state. Consisting of 32 social and economic indicators, the Index aims to spark new debate and discussion on local, statewide, and national levels, as United Way and community decision-makers set their agendas for the coming years.
<b>State Organizations</b>	Many states have a statewide United Way association, usually in the capital city, which addresses public policy issues, governmental funding and grants, statewide coordination, and in some instances, state-wide fundraising. State Organizations also provide technical support and training for local United Way staff and volunteers through workshops, conferences, newsletters, and/or special forums. These offices are excellent vehicles for information on legislature and grants.
<b>Statistical Analysis</b>	The act of employing mathematical techniques to the exploration of data to determine whether the information holds true for groups beyond the immediate study population.
<b>Status Report</b>	A periodic campaign report that indicates progress throughout the campaign on completed assigned campaign contacts and the achievement of campaign goals.
<b>Supplemental Fundraising</b>	(Also called Self-Support Activities.) A process through which an organization conducts efforts to raise funds to finance operating and/or capital expenses, beyond what United Way funds support.
<b>Target Audiences</b>	A distinct group of individuals (United Way volunteers, CEOs, etc.), that United Way focuses communication efforts towards.
<b>Time Limited Grant</b>	A Community Investment strategy whereby time-limited grants are made to programs which address seed funding, system building, or emergency funding.

<b>Trade Group Giving Analysis</b>	An analysis of giving trends by a trade group in which firms are compared to determine both how well they are doing and what their giving potential may be.
<b>Uncollectible Pledge Allowance</b>	Uncollected pledges, usually as a result of employee turnover.
<b>Unit of Service</b>	A consistent, quantifiable measure of service delivery to program clients; a measure of program output.
<b>United Way 2-1-1</b>	The FCC-designated national abbreviated dialing code for access to health and human services information and referral (I&R) nationwide.
<b>United Way Continuum</b>	United Way Continuum measures not only the financial revenue from campaigns, but also planned giving, in-kind gifts, leveraged funds, and other types of resources not counted within the campaign. The Continuum provides a more accurate picture of the total resources generated by a United Way.
<b>United Way Worldwide</b>	United Way Worldwide (UWW) is a global leadership organization for the United Way movement. UWW leads the movement through public relations, national brand advertising, the NFL partnership, and the management of relationships with global corporate and philanthropic partners and governments. UWW provides support service to local United Ways including training, consultation, mediation, conferencing, national research, and assessment tools.
<b>United Way Online</b>	United Way Worldwide's free, private website for member United Ways: <a href="http://online.unitedway.org">online.unitedway.org</a> .
<b>William B. Quarton Society</b>	Individuals and/or couples who contribute \$500-999 to United Way of East Central Iowa annually. (Established in 2002).
<b>Young Leaders Society</b>	Individuals and/or couples (35 years or younger) who contribute \$500 or more to United Way of East Central Iowa annually. YLS recognizes new community leaders and offer our future leaders the opportunity to begin serving the community through their financial gifts. (Established in 2000).
<b>Zero Accounts</b>	Companies and individuals with no record of giving to previous United Way campaigns.