

2022 CAMPAIGN COMPANY COORDINATOR GUIDE



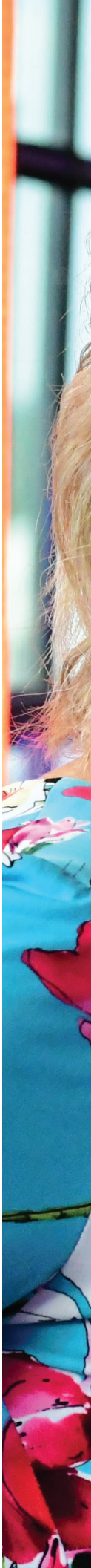
United Way
of East Central Iowa



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WELCOME!

Thank you for joining us as a United Way Company Coordinator! At United Way of East Central Iowa (UWECI), we believe each campaign should be tailored to fit your organizational culture to enable your co-workers to participate in improving the quality of life in our community by planning, organizing, and coordinating a successful United Way campaign within your company. You will be the ambassador, the motivator, and the storyteller and we will be with you every step of the way!

We know coming up with ideas and plans can be challenging, whether this is your first contact with United Way or not. But don't worry – we're here to help!

Know Your United Way

The more you know about United Way, the more passionate you are and the easier it is to share the message and inspire your coworkers.

MISSION STATEMENT

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

BRAND CREDO

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

WHO WE ARE

UWECI believes in a strong, thriving community where everyone belongs. Together with its partners, volunteers, advocates and donors, UWECI creates solutions to fill various gaps of need. By focusing on initiatives within economic mobility, childhood success, access to healthcare, and safety net services, UWECI improves the lives of individuals in Benton, Cedar, Iowa, Jones, and Linn Counties.

What We Do

For nearly 110 years, United Way has been a critical partner in strengthening our community's ability to respond to pressing health and human service needs.

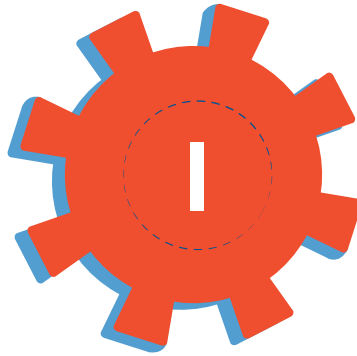
We support individuals in our area through addressing their greatest needs, and ultimately, we align our efforts and funding to provide the most effective impact for the community.

How Do We Do It?



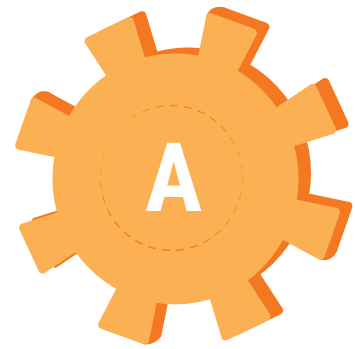
VOLUNTEER

- **Programming:** BOLD (Board Orientation & Leadership Development) & VITA
- **Events:** Day of Caring & Time for Art (Volunteer Recognition)
- **Workplace Volunteer Council**
- **Volunteer Now**
- **Volunteer Centers**



INVEST

- **Identifying Community Issues**
- **Participation in Solutions through community coalitions/groups/committees**
- **Support nonprofits through grant-making process**



ADVOCATE

- **Education of self and others**
- **Evoke Change:** Civic Circle, United We Vote, 21 Day Equity Challenge & Women

How Do We Invest?

Volunteers, community organizations, and UWECl staff help us achieve our goals by each playing a supportive role in the community investment process (formerly known as RFP).

Our volunteers—also known as Solutions Teams—are trained to review and assess proposals for funding and make recommendations to guide investment decisions that support our goals. This funding process occurs every three years with 2023 being the first year of the current cycle.

Who We Invest With

United Way's funded partners are key in making an impact in our community. They work to meet people's needs on a day-to-day basis and make a difference in the quality of people's lives. United Way funding goes to specific programs at nonprofits, rather than the nonprofit itself. The following nonprofits are receiving funding through our current three-year funding cycle, July 2020- June 2023:

Aging Services, Inc.

Area Substance Abuse Council (ASAC)

Benton County Volunteer Program

Big Brothers Big Sisters of Cedar Rapids and East Central Iowa

Boys & Girls Clubs of the Corridor

Catherine McAuley Center

Community Health Free Clinic

Eastern Iowa Health Center

Foundation 2 Crisis Services

Goodwill Industries of the Heartland

Hawkeye Area Community Action Program (HACAP)

Horizons: A Family Service Alliance

Iowa Legal Aid

Jane Boyd Community House

Kids First Law Center

Kids on Course

Rural Employment Alternatives, Inc.

Southeast Linn Community Center

The Arc of East Central Iowa

UnityPoint Health–St. Luke's Dental Health Center

Volunteer Services of Cedar County

Waypoint Services for Women, Children, & Families

Willis Dady Emergency Shelter, Inc.

Youthport

YPN

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The next funding cycle RFP will open October 2022, and funded partners will be determined in the spring of 2023. United Way funding will align with our focus areas of economic mobility, childhood success, access to healthcare and safety net services. Fundraising during this current campaign season will be distributed during the next funding cycle.



Your Role

Your role can be broken down to 5 steps: Energize, Inspire, Engage, Ask and Thank. We are here with all the details and help you need!



Energize: Recruit a strong team to help you with the campaign. Get your CEO/ company leadership to support your efforts.



Inspire: Share why you support UWECI and what UWECI does for our community. You can do this by creating your own narrative by utilizing UWECI materials such as videos, posters, email templates and other resources.



Engage: Connect your staff to our work. UWECI staff can help plan a kickoff event or other activities that will help you.



Ask: Provide links to your ePledge page, our giving page or provide pledge forms so everyone can participate. If you are interested in ePledge speak to your UWECI staff partner and discover if ePledge is best for your organization.



Thank: You know how to do this one.... but we can also help with email text, videos or fun and simple thank you ideas.



Planning Checklist

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

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

Before Campaign

- ☐ Attend United Way Company Coordinator training.
- ☐ Determine your participation goal, monetary goal, and incentives.
- ☐ Check out the online campaign toolkit for materials, templates, and other promotional items.
- ☐ Review the previous campaign's performance, opportunities, and challenges.
- ☐ Meet with your Campaign Specialist or UWECL staff member to discuss campaign strategies and develop a calendar of events.
- ☐ Determine your campaign plan and timeframe.
- ☐ Schedule your campaign kickoff.
- ☐ Schedule any additional special events. Our team is ready to help with creative ideas, along with a suggestion list in our campaign toolkit.
- ☐ Distribute the calendar of events.
- ☐ Send a campaign kickoff letter from your CEO endorsing the campaign.
- ☐ Invite retirees to your kickoff event.

During Campaign

- ☐ Hold kickoff event with your Campaign Specialist or UWECL staff member and agency speaker, either in-person or online.
- ☐ Distribute pledge forms and campaign materials to all employees. If more of your employees are working from home, we also have several ways to give electronically.
- ☐ Hold a leadership giving event.
- ☐ Share success stories, community facts, photos, and videos to keep momentum going. We are happy to help you gather information your team is interested in.
- ☐ Conduct special events, such as lunch and learns and employee engagement events to boost participation. We are ready with ideas to help you virtually, in-person or hybrid.
- ☐ Monitor progress towards your goal.
- ☐ Follow up with individuals who have not returned their pledge form.
- ☐ Send reminders about events, incentives, deadlines, and other important dates.

After Campaign

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

Unite To Inspire 101

Everyone—in some way, shape, or form—has reimagined their lives within the last two years. Our community's needs have changed since 2019, and it's our job to address them. So, we reached out to you—our community—through an assessment, listened to your needs, and took action based on those results.

Through Unite to Inspire, our community-driven strategy, we're fostering an Eastern Iowa where everyone can succeed, and inspires others to do their part to help others thrive.

Developed from the voices of our community, Unite to Inspire ensures that our community's needs are met for everyone to have their own home of stability. This strategy focuses on addressing issues in four key areas:



Through safe and affordable housing, individuals and families will have greater Economic Mobility and overall stability.



Childhood Success establishes a strong foundation for children to succeed in life, no matter their age or background.



Access to Healthcare ensures that physical and mental healthcare is available and affordable for those who need it.



All of these areas are surrounded by Safety Net Services, which catch individuals and families when they fall and bounce them right back to where they were.



Unite to Inspire

A home of stability creates
a stronger community



Learn more about Unite to Inspire at uweci.org/unite.

Goals

Goals can help your employees feel like they're on a team, which can directly affect your campaign's success. Setting realistic, yet challenging goals is important to ensure your workplace giving campaign is a success.

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

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

IF YOUR COMPANY PARTICIPATION LEVEL IS LESS THAN 50%:

- Include United Way materials in new-hire and retiree packets. Encourage new hires to fill out their pledge form. Retirees count toward your campaign total, too! Ask your Campaign Specialist or UWEI staff member about information for retirees and new hires.
- Email updates during your entire campaign to show the difference their gifts make. If you need help with this, we've crafted messages for you to use.
- Teach employees about matching gift dollars. If your company doesn't offer matching gifts, ask your CEO to consider it.

Campaign Messaging

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

- To have a strong, healthy, vibrant community, we need everyone. From grocery store workers and truck drivers to doctors and sheet metal workers, everyone is part of the equation that makes East Central Iowa the wonderful place it is.
- A donation to United Way is not a short-term investment; it's about creating lasting change. We fight for our neighbors: for those whose voice we don't always hear and whose names we do not know.
- We target the root causes of issues and respond to immediate basic needs.
- We don't need a few people to give a lot, we need lots of people to give what they can. Everyone can do something to support their community, whether that's through volunteering, investing, or advocacy.

**If you want information about a specific funding area, program category,
or Unite to Inspire, just ask!**

Campaign Kickoff

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

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

We are happy to present in a way that best supports your staff - in person, virtually or hybrid. Reach out to your UWECI contact to find out how to make your kickoff awesome!

Campaign kickoff basics

- Your United Way representative.
- A story told by a United Way staff member, community partner, or coworker who benefited from a UWECI funded program or partner.
- Our campaign video showing why United Way is important to our community.

Making the ask

The number one reason people don't give to United Way is because no one asks them! Our job is to make sure everyone in the workplace has a chance to give. Be sure to:

- Hand out pledge forms after your meeting so each person gets one, or provide information for individuals to donate online.
- Make it inspiring! The moment a person receives their pledge form, they will decide to give or not within ten seconds.
- Ask for a completed pledge form from everyone, even if they choose not to give. That way, you'll know everyone had an opportunity to do so.

Campaign Ideas

- **Massage Therapist:** Find a therapist, preferably one who will donate time, to visit your workplace. Employees pay for a massage, with proceeds benefiting United Way.
- **Silent Auction:** Items could include a preferred or coveted parking spot, lunch with the CEO, extra vacation time, and more!
- **Cook/Bake-Offs:** Host a chili or cookie cook-off to see who has the best recipe!
- **Bike Rides:** Have a bike ride on a local trail and meet up for dinner and drinks after the route! All registrations from bike ride participants go to United Way.
- **Karaoke/TikTok Challenge:** Each department picks a selection, and the audience chooses a winner by putting money in the jars of the department they think was best.



For more campaign ideas, visit our online toolkit at uweci.org/campaign

Leadership Recognition Event

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

This is why holding a leadership giving campaign is one of the best ways to have a successful campaign. Leadership giving allows your employees to make a great impact on the lives of East Central Iowans and sets your company apart as a leader in our community. Employees can become leadership donors by giving \$250 or more.

To start your leadership giving campaign

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

Sample leadership giving meeting agenda

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

Other ways to increase leadership giving

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

Leadership Societies

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

Campaign Wrap-Up

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

- **Write thank you notes**
- **Have a late afternoon snack for donors**
- **Send an email or thank you from your CEO**
- **Reveal your company total in an email or newsletter**

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

Year Round Engagement

We would love to see you and your team more than once a year. Stay connected with us year-round to hear updates on how your donations are at work. Donors have indicated they want to know the impact of their investment dollars and we love to share! Year-round engagement leads to stronger connection and should make your job easier.

Here is a quick list of things to consider for your company. Talk with your UWECL staff member for more ideas and suggestions on how to best communicate the impact you and your organization are making in our communities through United Way.

- **Agency Tours:** Coordinate with your UWECL staff person for your team to tour a partner agency.
- **Affinity Groups:** Ask about our Labor Leadership Society, Women United or Emerging Leaders United.
- **Board and Committees:** We have several opportunities to join!
- **Board Orientation Leadership Development (BOLD):** United Way program that provides skills and training for individuals to become impactful, effective nonprofit board members.
- **Civic Circle:** Civic engagement program to develop personal action plans for equity and inclusion work.
- **Day of Caring:** Volunteer Day for Companies
- **Donation Drive:** Often times, nonprofits are looking for things like diapers or school supplies.
- **Lunch and Learn:** We would love to coordinate a time to come to you over a lunch hour to talk about a subject your team is passionate about. We can find speakers and create a one-of-a-kind event.
- **Newsletter:** Make sure we have your email and that you're on our subscription list.
- **Social Media:** Check us out on Facebook, Twitter, Instagram, LinkedIn, TikTok, and YouTube!
- **Time for Art/Volunteer Awards:** Our annual silent auction featuring local art where you bid volunteer hours instead of dollars.
- **VITA:** Volunteer Income Tax Assistance program that provides free tax preparation for individuals in our area.
- **Volunteer Projects:** Coordinate with our volunteer engagement team. They can help you plan an activity for your team or get involved with something going on in our community.

UWECI by the Numbers

Donor designation

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

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

If you have questions about gift designation, please reach out to your UWECI staff member.



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

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

Tax receipts

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

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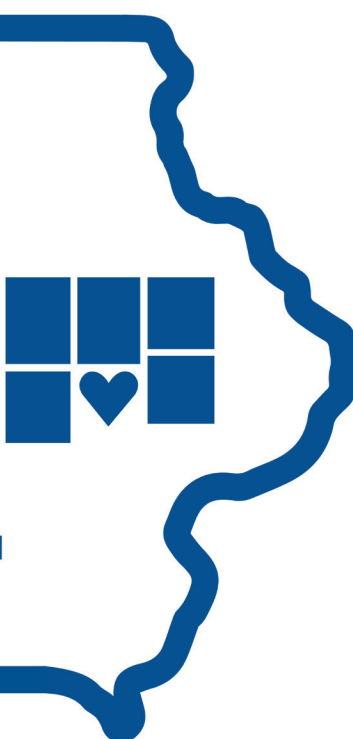
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- Jim Beardsworth, Retired- Transamerica
- Zachary Bohannon, EP Holding Co.
- Lydia Brown, Skogman Realty
- Noreen Bush, Cedar Rapids Community School District
- Matt Evans, TrueNorth Companies
- Teri Gibson, TrueNorth Companies – Co-Chair
- Jack Gonder, Bankers Trust
- Curt Heideman, Bankers Trust
- Dennis Jordan, Alliant Energy
- James Klein, Cedar Rapids Bank & Trust
- Beth Lehman, Collins Aerospace
- Kelly Lind-Daufeldt, US Bank
- Aaron Loan, Acumen
- Kelley Marchbanks, Advancement Resources – Past Co-Chair
- Perry Moser, CRST International, Inc.
- Nick Neilsen, GreatAmerica Financial Services
- Toby Olsen, OPN Architects
- Anne Parmley, Community Volunteer – Co-Chair
- Dave Parmley, First Interstate Bank – Co-Chair
- Alejandro Pino, YPN
- Gary Streit, Shuttleworth & Ingersoll, PLC





UNITE TO INSPIRE



United Way
of East Central Iowa

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