

2023 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 that improve people's lives.

OUR VISION

UWECI is the trusted leader and catalyst for envisioning and creating positive community change.

OUR 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

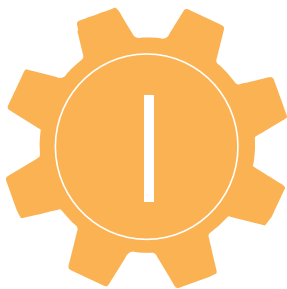
We support individuals in our five-county area by addressing their greatest needs, and ultimately, we align our efforts and funding to provide the most effective impact for the community.

How We Do It?



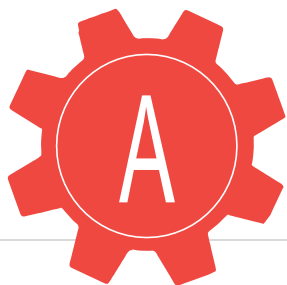
VOLUNTEER

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



INVEST

- Your investment goes towards our work with nonprofit & community partners to ensure your dollars go to our community's greatest needs.
- Invest through:
 - Workplace giving
 - Individual donations
 - Estate Planning



ADVOCATE

- Education of self and others
- Evoke change: Civic Circle, United We Vote, Women United

How Do We Invest?

Volunteers, community organizations, and UWECl staff help us achieve our goals by each playing a supportive role in the investment process.

Our volunteers – also known as Solutions Teams – are trained to review and assess proposals for funding and to make recommendations to guide investment decisions that support our community goals. With Unite to Inspire strategies directing our funding, we have expanded and updated our RFP system for the next three-year cycle to be more inclusive.

Who We Invest With

United Way’s funded partners are key to making an impact in our community.

They work to meet people’s needs on a day-to-day basis and make a difference in the quality of people’s lives. United Way funding goes to specific programs at nonprofits, rather than the nonprofit itself. The following nonprofits receive funding beginning of July 2023:

Economic Mobility	Childhood Success	Access to Healthcare	Safety Net Services
Affordable Housing Network Inc.	Area Substance Abuse Council (ASAC)	ASAC	Catherine McAuley Center
Catherine McAuley Center	Big Brothers Big Sisters of Cedar Rapids & East Central Iowa, Inc.	Cedar County Public Health	Feed Iowa First
Catholic Charities of the Archdiocese of Dubuque, IA	Boy and Girls Club of the Corridor	Rural Employment Alternative	Foundation 2 Crisis Services
Goodwill Industries of the Heartland	Four Oaks Family and Children Services	St. Lukes Health Care Foundation	HACAP
Hawkeye Area Community Action Program (HACAP)	HACAP	Volunteer Services of Cedar County	Old School Produce Partners, Inc.
Hope Community Development Association Inc.	Kids First Law Center	Youthport	Horizons
Horizons: A Family Service	The Arc of East Central Iowa	Women United Fund:	Southeast Linn Community Center
Iowa Legal Aid	Waypoint Services	ASAC	Waypoint Services
Matthew 25	YPN	HACAP	Willis Dady
The Arc of East Central Iowa	Youthport	Eastern Iowa Health Center	2 1 1
United We March Forward	Zach Johnson Foundation	Community Health Free Clinic	
Waypoint Services			
Willis Dady Emergency Shelter, Inc.			

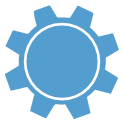
Your Role

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!



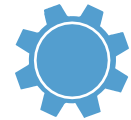
Energize

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



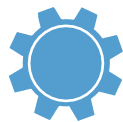
Inspire

Share the story of what inspires you to give back to UWECI. We have resources, including videos, that will help you share the stories of people in our community who are getting stronger every day with the support of United Way.



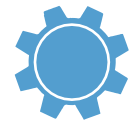
Engage

Connect your staff to our work. UWECI staff can help plan a kick-off event or other activities that will help you engage with your peers.



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.
- ✓ Review the previous campaign's performance, opportunities, and challenges.
- ✓ Check out the online campaign toolkit for materials, templates, and other promotional items.
- ✓ Meet with your Campaign Specialist or UWECI staff member to discuss campaign strategies and develop a calendar of events.
- ✓ Determine your participation goal, monetary goal, and incentives.
- ✓ 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 UWECI 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, to boost engagement.
- ✓ 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 UWECI staff member. If you need assistance with this, we're happy to help!
- ✓ Announce campaign results to employees.
- ✓ Post campaign photos on your corporate social media networks and tag @UWECI.
- ✓ Evaluate the challenges and successes of your campaign; save notes for next year.
- ✓ Thank donors with a celebration event, letter, or email from your CEO and a presentation from a UWECI representative.
- ✓ Talk to your loaned executive about how UWECI can continue to improve its service.

Unite to Inspire 101

As Eastern Iowa's collaborator and convener, we plan to continue bringing individuals together to foster a thriving community. New opportunities, and a focus on our community's top issues of affordable housing, childcare, access to healthcare and safety net services will create sustainable solutions for our community.

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.

This strategy focuses on addressing issues in four key areas:



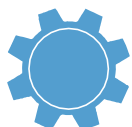
Through safe and affordable housing and workforce development, individuals and families will have the opportunity to build **Economic Mobility** and overall stability.



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



Improving **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 the support of **Safety Net Services**, which catch individuals and families when they fall and bounce them right back to where they were.



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

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, UWECI has 30 local companies that have 100% employee participation. Participants can pledge any amount and still count toward your goal.

If your company participation level is less than 50%:

- Include United Way materials in new-hire and retiree packets. Encourage new hires to fill out their pledge form. Retirees count toward your campaign total, too! Ask your Campaign Specialist or UWECI staff member about information for retirees.
- 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 UWECL contact to find out how to make your kickoff awesome!

Campaign kickoff basics

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

Making the ask

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

- Hand out pledge forms after your meeting so each person gets one 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-Offs & Bake-Offs: Host a chili or cookie cook-off to see who has the best recipe!

Bike Ride: 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/coordinator toolkit



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 event 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 Eastern Central Iowans and set 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'Elerry 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 union members who give \$500+ to healthcare services for women in need.
- **Labor Leadership Giving Society:** Recognizes union members who give \$350+
- **Touch Tomorrow Society:** Recognize donors who support United Way's Endowment through outright of real 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, UWECI 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 connections and should make your job easier.

Here is a quick list of things to consider for your company. Talk with your UWECI 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 UWECI staff member 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 non-profit 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 & Learn:** We would love to coordinate a time to come to you over a lunch hour to talk about a subject your workplace is passionate about.
- **Newsletter:** Make sure we have your email and 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 for artwork.
- **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 workplace or get involved with something going on in the 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.

	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).

UWECI Staff

Mégan Valenta
**Senior Manager, Workplace Campaign
& Donor Engagement**

megan.valenta@uweci.org
319-398-5372 ext. 816

Chris Thomas
Senior Donor Engagement Specialist

Chris.thomas@uweci.org
319-398-5372 ext. 819

Ali Sauer
Donor Engagement Specialist

ali.sauer@uweci.org
319-398-5372 ext. 821

Anne McLaughlin-Smith
Donor Engagement Specialist

anne.mclaughlin-smith@uweci.org
319-398-5372 ext. 811

Campaign Cabinet

- Teri Gibson, TrueNorth Companies – Past Co-Chair
- Anne Parmley, TrueNorth Companies - Past Co-Chair
- Dave Parmley, TrueNorth Companies – Past Co-Chair
- Dave Schreck, Collins Aerospace – Co-Chair
- Jack Gonder, Bankers Trust – Co-Chair
- Curt Heideman, Bankers Trust – Co-Chair
- Jim Beardsworth, Retired, Transamerica
- Jacqueline Berst, USBank
- Zach Bohannon, First Interstate Bank
- Lydia Brown, Skogman Realty
- Landon Burg, OPN Architects
- Dennis Jordan, Alliant Energy
- Beth Lehman, Travero
- Aaron Loan, Acumen
- Kelley Marchbanks, Advancement Resources
- Nicole Mead, BerganKDV
- Nick Nielsen, GreatAmerica Financial Services
- Lauren O’Neil, City of Cedar Rapids
- Alejandro Pino, YPN
- Gary Streit, Shuttleworth & Ingersoll PLC
- Jennifer Welton, Cedar Rapids Bank & Trust
- Brooke Willson, Transamerica

WHAT INSPIRES YOU?
UNITE TO INSPIRE

