United Way of Story County fights for the health, education, and financial stability of every person in our local community. As a volunteer, you play a critical role in this fight by ensuring the growth and success of our community campaign.

Volunteers have the unique opportunity to harness the generosity, talent, and energy of your workplace to give back to our community and help United Way’s efforts in building a stronger, healthier Story County. Whether this is your first year as an employee coordinator, or if you are a campaign veteran, the information in this guide will help you plan and execute a smooth – and successful – United Way campaign. This information can also be found on our website at www.uwstory.org/campaign-toolkit.

Thank you for joining our United Way team.
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## OUR VISION

TO IMPROVE THE QUALITY OF LIFE IN OUR COMMUNITY FOR INDIVIDUALS AND FAMILIES.

## OUR MISSION

UNITED WAY OF STORY COUNTY IS A STRATEGIC LEADER IN BUILDING COUNTYWIDE PARTNERSHIPS TO IDENTIFY NEEDS AND TO DEVELOP, SUPPORT, AND EVALUATE EFFECTIVE HUMAN SERVICES, ESPECIALLY IN THE AREAS OF HEALTH, EDUCATION, AND FINANCIAL STABILITY, FOR OUR DIVERSE COMMUNITY.

## COMMUNICATION CENTER: MESSAGES YOU CAN USE

- Examples of Needs and Solutions
- Letter and Email Templates
- Posters, Table Tents, and Signage
- Presentation Materials
- Videos
JUMPSTART YOUR CAMPAIGN

Planning makes perfect in the case of a United Way drive. The four factors that are most often at play in a successful drive are:

1. an organized project manager
2. vocal support and endorsement from organizational leaders,
3. an easy enrollment process, and
4. a network of people helping behind the scenes.

We have ways to help strategize for each of these things. Please do not hesitate to contact us to brainstorm ideas to further our partnership with your organization!

NEVER HAD A CAMPAIGN BEFORE?

Welcome aboard! We’re so glad you are joining in as a partner in our work. You’ve likely had a meeting with United Way staff already, but if you haven’t please reach out so we can meet in person. As a champion within your employer campaign, you may quickly find yourself as the go-to resource for not only the campaign, but volunteering and advocacy questions, too. You might find some of those answers in this toolkit. If not, remember we are here to help! Reach out with all of your questions - big and small.

For new campaigns, you may want to schedule a presentation to your management or leadership team to introduce the idea of the employee drive and explain United Way’s work in more detail. Another early stop will be to HR. Employer campaigns that have payroll deduction have higher participation and per capita giving. We can answer any questions your HR department has about adding this as an option.

Next you’ll want to recruit your internal committee. Best practices across the United Way network include having a committee of employees in order to energize the campaign, spread the effort across multiple parties, and build buy-in across departments.

Once you have your team in place, you’ll be ready to follow the sample timeline on the next page.

DATES TO KNOW

June - Campaign Materials Available
August - Sign up for Day of Caring
August 30 - Pacesetter Campaigns Due
September 11 - Kickoff and Day of Caring
December 1 - All Campaigns Due
December 11 - Celebration Event
# Employee Campaign Coordinator Basics

## Timelines and Check-Ins

### 6-8 Weeks Before Kickoff

<table>
<thead>
<tr>
<th>Assigned To</th>
<th>Target Date</th>
<th>Completed</th>
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<tbody>
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- Hold meeting with United Way staff and company leaders.
- Recruit your volunteer team and set your kickoff date.
- Contact HR to determine what information and lead-time they require.
- Set a goal for your drive (participation, number of donors, % increase).

### 4-6 Weeks Before Kickoff

- Visit United Way’s website to view resources available to support your campaign.
- Schedule department or all-company meetings and speakers.
- Determine special events your team would like to run. Be sure they are serving an identified purpose, like building awareness or raising additional campaign dollars.

### 2-3 Weeks Before Kickoff

- Ask your CEO to author a letter or email of support.
- Announce your campaign plans company-wide.
- Prepare campaign materials and distribution plan for kickoff.

### 4-5 Days Before Kickoff

- Customize reminder email for your kickoff event.
- Hang posters in high traffic areas of your office.
- Post information or even videos on your company’s intranet, if possible.

### Day of Kickoff

- Send one last email reminder about your event.

  Inform and Ask:
  - Explain United Way’s impact with speakers, videos, personal testimonials.
  - Ask for your colleagues to join you with a gift this year.
  - Include information on details of how to give and any incentives for giving.

### Throughout Campaign

- Send success story emails or statistics in mid-campaign updates.
- Use department meetings as reminder points.
- Take pictures of your activities to post internally and share with United Way.

### After Campaign

- Provide HR with copies of all payroll deduction elections.
- Communicate results in a final email with a message of thanks.
- Finalize reporting template to be submitted with completed campaign.
- Arrange for a delivery or pickup of your campaign with United Way staff.
## Goal Setting

<table>
<thead>
<tr>
<th>Measure</th>
<th>Last Year</th>
<th>This Year</th>
<th>Key Strategies</th>
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<tr>
<td>Employee Participation</td>
<td># of Donors _____</td>
<td># of Donors _____</td>
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<tr>
<td></td>
<td># of Employees _____</td>
<td># of Employees _____</td>
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<td></td>
<td>% Participation _____</td>
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<td></td>
<td>Average Gift _____</td>
<td>Average Gift _____</td>
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<td>Employee Contribution</td>
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<tr>
<td>Total</td>
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<td></td>
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</tr>
<tr>
<td>Corporate Gift</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Special Event Total</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Overall Campaign Total</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Considerations in goal setting:

If your company could add ____ number of people with $1 per pay period, how would that increase your total?

If your company could add ____ number of people at your average gift, how would that increase your total?

If your company could increase your average gift by 10%, how would that increase your total?

### Ideas for committee goals outside of campaign production:

Set targets for number of campaign activities, number of campaign communications, or volunteer projects
WAYS TO GIVE

Charitable giving is a personal and voluntary decision. United Way encourages individuals, corporations, and foundations to do what is most comfortable for them and most aligns with their philanthropic goals.

A gift TO United Way

United Way accepts many types of gifts, including cash, check, payroll deductions, stock, and more. We request unsolicited in-kind gifts to first reach out to ensure we are the appropriate party to accept a product donation.

A gift to United Way is any gift directed to our Community Fund, one of our three issue areas (Health, Education, and Financial Stability) or one of our special initiatives. Each gift to United Way is combined with those from thousands of donors and invested directly into initiatives and programs that benefit the entire community, not just one program, issue, or population.

Programs supported by the Community Fund:

• Address the most critical issues and community needs
• Receive oversight provided by United Way staff and volunteers
• Provide quarterly financials to be reviewed by United Way
• Depend on United Way’s ongoing and consistent support, in addition to other funding sources
• Make a measurable impact in our local community

An undesignated gift to United Way allows you to help more people than a gift to a single nonprofit can.

United Way experts look for gaps and duplications so campaign dollars go to the needs everyone is aware of, but also to those needs less obvious, but no less important.

Our community’s problems are interrelated, and only undesignated gifts fund a diversity of programs to work together to address the complex causes of poverty, school readiness, teen pregnancy, and many others – in a way that no single agency, donor, volunteer, or sector of the community can do alone.

United Way works across the county to leverage resources, volunteers, experts, and other service providers for short-term relief and long-term success.

A gift THROUGH United Way - Designations

United Way understands that some donors choose to direct a portion of their gift to a specific agency. As a benefit to our donors, and a service to the companies who host workplace campaigns, United Way processes these requests. However, United Way is unable to guarantee how these funds will be used.

Donations of any amount can be directed to another United Way across the United States. Donations $50 or more can be directed to any eligible 501(c)3 organizations. Eligibility is determined in accordance with our Designation Policy. This policy states the donor must provide accurate contact information for their chosen organizations, including an EIN. Selected organizations must provide verification of their nonprofit status with the IRS and return an anti-terrorism form annually.

Participating in Special Events

Special events can energize campaigns by generating interest and/or additional donations for United Way’s work. However, special event donations are not eligible to be designated due to the nature of having received a good or service in return for the donation. Intentionally building campaign events that are efficient and effective can be a speciality. The next page has idea options for you to consider.
Upon the close of your campaign, you’ll be eager to tabulate results and report them to your committee and organization’s leadership. To help you with this, and for United Way to efficiently process your campaign, please complete the reporting template included to the right.

When submitting your campaign to our office, please include this reporting document, pledge cards and designation forms (or a spreadsheet with those clearly indicated), and any cash or checks you have collected. **We also ask for your assistance in copying all pledge forms for your internal payroll processing.** This, again, helps us efficiently manage your campaign and get results to all necessary parties in a timely fashion. If your corporate gift or match requires an invoice in order to process payment, please note that on your completed campaign.

Finally, we would like to record how payment on your campaign will be received. Companies vary in their pay cycle, so your assistance in completed the processing form to the right will ensure we are moving along at the expected rates.
### ESSENTIAL FORMS

#### 2020 PLEDGE FORM

<table>
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<tr>
<th><strong>Donor Name</strong></th>
<th>[Redacted]</th>
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</thead>
<tbody>
<tr>
<td><strong>Preferred Mailing Address</strong></td>
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<tr>
<td><strong>Zip</strong></td>
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<tr>
<td><strong>Preferred Email</strong></td>
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<td><strong>Preferred Phone</strong></td>
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<tr>
<td><strong>Employee Name</strong></td>
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<td><strong>Employee Name</strong></td>
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<td><strong>My Gift</strong></td>
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<tr>
<td><strong>Other</strong></td>
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</table>

#### DONOR CHOICE FORM

<table>
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<th><strong>United Way of Story County</strong></th>
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<tbody>
<tr>
<td><strong>Name</strong></td>
</tr>
<tr>
<td><strong>Address</strong></td>
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<tr>
<td><strong>Phone</strong></td>
</tr>
</tbody>
</table>

#### DONATION PROCESSING

**Thank you for your participation in United Way of Story County! Please read the below for your support.**

**Payroll Deductions**
- If you wish to make a payroll deduction, please provide the following:
  - **Payroll Number**: [Redacted]
  - **Employer Name**: [Redacted]

**Corporate Donations and Matching Gifts**
- If your company matches contributions, please provide:
  - **Company Name**: [Redacted]
  - **Matching Gift Contact**: [Redacted]
  - **Matching Gift Source**: [Redacted]

Please email the completed forms to Jackie Anderson, Finance Director:
jac@storyway.org
Online volunteer opportunity database

United Way of Story County’s partner agency Volunteer Center of Story County hosts an online volunteer database that is accessible 24/7. This database allows you to sort by area of interest, organization, one-time or recurring volunteer opportunities. We encourage our partner agencies to post their openings and volunteer needs through this platform.

For more information visit: https://www.vcstory.org/.

Day of Caring - September 1, 2020

Each year United Way deploys hundreds of volunteers on our annual Day of Caring. This one-time volunteer opportunity can be completed through a group sign-up or on an individual basis. Project selection will be available the first week of June. Projects are self-assigned, so be sure to log on as soon as you can to browse the full range of offerings.

To be notified when options are available, email Kristin Pates at kpates@uwstory.org.

Women United Mentor

Women United is looking for volunteer mentors to supplement the program participants in-class knowledge. Volunteers do not need to have previous mentoring experience; however, basic money management skills are required. Volunteers attend a four-hour training on interpersonal relationship building and how to discuss money management practices with participants.

For more information, email Jerri Baumeister, Women United Director, at jbaumeister@uwstory.org.

Summer Enrichment Program

United Way of Story County operates summer enrichment programs at multiple sites through the county. Enrichment sites offer free, engaging activities to students who are at risk of falling behind over the summer. This program takes a multitude of volunteers in order to run successfully. Please consider joining us to serve a meal or assist in a classroom experience.

For more information, email Malai Amfahr, Story County Reads Director, at mamfahr@uwstory.org.
Tocqueville Society: Donors giving $10,000 or more annually. Named after a French philanthropists who was inspired by Americans who generously gave of themselves to help other people. The campaign growth in this division has been phenomenal since 2014.

Leadership: Community members pledging $1,000 or more annually make a major difference in the ways UWSC can act on its mission. More than 50% of the annual campaign can be attributed to leadership level donations.

Women United: Women United donors have full recognition as Leadership donors, though their funds are dedicated to the purpose of providing self-sufficiency and confidence through financial education. The program also includes scholarships and has hosted special classes for senior women.

Young Leaders Society: Engaged community members under the age of 40 can show their support for improving lives through this affinity group. At a gift level of $250-$999 annually, YLS is designed to develop philanthropic behaviors early. Young Leaders will have special ways to become involved and educated in UWSC’s work to improve lives and communities.
### Hesitations

**I/We Give to Other Nonprofits**

Unlike a gift to a single nonprofit, a gift to United Way’s Community Fund impacts many organizations and causes. United Way determines the most pressing issues in our community, identifies the strategies and organizations best equipped to address those issues, and works with them to make an impact. The United Way Campaign gives you and your employees choices to align with your passions, simplify your giving, and make the most impact on your community.

**Our Workforce is Offsite OR We Don’t Have Time for a Campaign**

United Way is dedicated to helping with workplace campaigns and will support you and your staff with everything you need to run a campaign. This includes providing materials, templates, best practices, videos, data, scheduling speakers, organizing events, and almost anything else to make your campaign easy.

**Our Employees Aren’t Interested OR We Don’t Want to Pressure Employees**

United Way does not want employees to feel pressured to give either; however, running a workplace campaign makes giving easy. We often hear that the number one reason people don’t give is because they were never asked.

**We Are a Small Company OR We Don’t Have an Employee to Run a Campaign**

Companies who partner with United Way range from small LLCs to Fortune 500 companies and everything in between. United Way brings on additional staff (sponsored by our corporate and non-profit partners) during the campaign to make your workplace campaign easy! Your employees who help coordinate the campaign also develop skills that may translate to their other work with your organization. They also have opportunities to network with individuals from other organizations.

**Charitable Dollars Are Already Allocated**

Pledges to the campaign can be paid in one-time payments or regular installments over the next calendar year. Please consider this flexible option or giving to United Way in the future. When would be a good time of year to reach out in the future? We would be happy to meet with you to discuss a variety of partnership opportunities including sponsorship and in-kind opportunities, which could be supported by another portion of your budget and would be beneficial to both organizations. If a financial gift is not possible at this time, consider engaging your employees through volunteerism.

### Myths

**United Way Only Invests in Poverty Programs**

United Way impacts the lives of those with low- to moderate-incomes, but also has a deep impact with aging populations, people with intellectual disabilities, those living with mental illness and much more. Safety net programs are only a part!

**United Way is Just a Middleman**

Donations made to United Way make the greatest difference and help the most people. United Way monitors results to ensure the programs are making an impact. You can be certain your money is well invested. In addition, your donation may qualify for matching funds, increasing the investment even more.

**United Way has High Overhead Costs**

United Way operates at an extremely high rate of efficiency. Nearly 85 cents of every dollar raised is invested into solving community problems. This greatly exceeds the minimum standard of 65 cents which is required for a nonprofit to be considered efficient and living up to its mission.

**Local Dollars are Spent Nationally**

As part of a network of 1,800 local and independent United Ways, United Way of Story County receives services and support from United Way Worldwide. However, dollars raised in our area stay here. United Way of Story County has its own 501(c)(3) certification and is governed by a local board of directors who oversee annual investments from the Community Fund.

**CEO Compensation is Too High**

An email circulated widely for several years, listing information about executive compensation and overhead costs at large nonprofits. That document contained erroneous information about United Way Worldwide CEO Brian Gallagher. It makes false claims about perks and overhead costs.
**Corporate Social Responsibility:** Partnering with United Way will help your company develop and execute compassionate corporate social responsibility and community investment programs. You can do this by giving a corporate gift, running a workplace campaign, becoming a sponsor, providing in-kind support, and/or volunteering as a team.

**Corporate Recognition:** An enhanced community image helps your marketing and employee recruitment efforts. We proudly thank our outstanding company campaigns with various awards at the close of the drive. LIVE UNITED Campaign Awards, Gold Awards, 100% Participation Awards, and Highest Percent Increase Awards are announced at the Celebration Event.

**Employee Satisfaction & Retention:** Companies that run a United Way campaign elevate themselves in the community and have employees who feel part of something bigger. This is especially true when companies get input from employees and allow them to spend some work time coordinating events and volunteering.

**Staff & Professional Development:** Working with United Way provides employees growth opportunities within your organization. It also brings together employees from all levels and departments who might not otherwise have the opportunity to work together – fostering a stronger, more cohesive, and more motivated workforce.

**Connection to Your Community:** Supporting United Way not only provides a means for your employees to give, but an opportunity to volunteer and learn about services they, or someone close to them, may need.

**Individual Recognition:** Build your personal, professional, and philanthropic networks through United Way events and volunteer activities. United Way of Story County offers the following affinity groups: Leadership, Women United, Endowment Builders, Tocqueville Society, and Young Leaders Society.

**Donations Stay Local:** Gifts to United Way are invested locally to create lasting change. The money you and your employees contribute is the cornerstone of a healthy and safe community, making it a better place to live, work, and do business.

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**United Way:**
- Partners with companies and respects their time, work environment, and culture.
- Supports company staff during the campaign and throughout the year.
- Provides speakers, printed materials, and online tools.
- Allows individuals to make an annual gift directed towards various issue areas, community initiatives, and/or nonprofits.
- Offers team-building experiences through volunteering with Day of Caring.
## LOCAL NEEDS AND SOLUTIONS

**Evidence of Need**  |  **UWSC-funded solution**
---|---
### Health
- **26.5% of Story County students qualify for free or reduced lunch, some buildings have rates as high as 40%**
  - BackPack Program is available to feed kids over the weekends, summer feeding programs help during June, July, August. During the summer of 2012 there was only one summer meal site providing a meal for about 100 children; this year we anticipate 900 children will receive meals from 7 sites.
- **11% of Story County adults report 14 or more days of poor mental health per month in 2016.**
  - Eyerly Ball served 763 people with outpatient mental health evaluation and ongoing treatment. NAMI'S Wellness Center is open in the afternoons (M-F) and served 110 individuals last year.
### Education
- **11% of third graders in Story County are not reading at the proficient level**
  - Iowa Reading Corps can help these kids (and others K-3) catch up in reading and be launched with their peers.
- **Low to moderate income students can lose up to three months of their school-year gains during the summer**
  - Enrichment services aimed at keeping kids from experiencing the "summer slide".
### Financial Stability
- **Story County has the highest rate of food insecurity (15.5%) in the state (11.5%).**
  - The two ASSET/UWSC-funded food pantries served over 17,000 people in 2018. In addition, UWSC conducts the LIVE UNITED Food Drive every spring to help stock shelves for 17 Food Pantries throughout Story County.
- **Alternative financial products (non-bank check cashing/money orders, payday lending, pawnshops, rent-to-own, tax refund anticipation loans) are used by 42% of Iowa households with incomes of $50,000 or less. 16.1% of Story County households are underbanked and 6.3% of Story County households are unbanked.**
  - At the end of the Women United workshop series, 93% of participants report they use a bank (71% reported they use a bank on the first night of the series).
COMMUNICATION CENTER: MESSAGES YOU CAN USE

CO-BRANDED LETTER

Consider kicking off your drive with a co-branded letter from your organization’s leadership or committee. We have several examples to choose from!

**Date**

**Dear Staff:**

Imagine a community where all children have the necessary skills to succeed in school, where all families have their basic needs met, and where all individuals have access to crucial healthcare services like dental care.

This is what we are working to create through our partnership with United Way of Story County. Together we have the power to create a stronger, more vibrant Story County and a better life for us all. Their work touches each of us as concerned citizens and caring educators.

__ is fortunate to have a strong partnership with United Way of Story County and take pride in connecting our employees with their work in many ways.

Please review the information enclosed to see United Way’s work in more detail or check out one of the campaign activities organized by your colleagues to learn more.

---

**Sincerely,**

[Your Logo Here]

FROM CEO

**Dear Fellow [Company Name] employees,**

During the next few weeks, you will be hearing a great deal about our local United Way, United Way of Story County. They recruit people and organizations from across the community to bring passion, expertise and commitment to get things done. By focusing on the building blocks for a good quality of life—health, education, and financial stability—United Way is strengthening communities and opportunities for all who live there.

In addition, we are excited for the opportunity to learn more about the work of United Way of Story County and to provide our employees with the tools they need to make a difference.

Please join us in supporting United Way. Thank you for your consideration.

[Your Logo Here]

FROM COMMITTEE

**Dear [Committee Name] Member, [Department Name],**

United Way is there in crisis, recovery, and times of growth. Just like United Way, we believe in The Power of Community. When Story County was challenged in unprecedented ways, United Way stepped up to ensure our community’s needs were covered. They helped to organize volunteers, put in place a solution for childcare for medical personnel and other essential employees, and helped support learning enriched environments during emergency distance learning. They also launched new funds to help meet increased needs. Here’s a look at what those funds helped to provide and a link to their brochure where you can see all of their partners for 2020.

[Brochure Link]

Relief, response, and community recovery

- [Relief, response, and community recovery](https://www.ourstory.org/sites/ourstory.org/files/2020-07/2020x20Brochure%20web.pdf)

Include any details about your pledge process, progress towards goal, or communications plan.

Power of Community Video: [https://youtu.be/Gz70ug8b15k](https://youtu.be/Gz70ug8b15k)

Include any details about your pledge process or communications plan.
COMMUNICATION CENTER: MESSAGES YOU CAN USE

POSTERS, SIGNAGE, TABLE TENTS

Posters are available to showcase an overview in health, education, and financial stability or the size of gifts and impact they hold.

Printable sizes are available for signs or table tents to highlight the impact in each of the three areas of health, education, and financial stability. Impact story flyers are also available.
COMMUNICATION CENTER: MESSAGES YOU CAN USE

PRESENTATION MATERIALS

Sample Agenda - 5 Minutes in Length

Introduction - 1 Minute
Have your CEO introduce United Way Representative.

United Way Representative Presentation — 3 Minutes
The United Way representative will give a brief overview United Way.

Closing — 1 Minute
Campaign Champion thanks everyone for their time, invites participation through a call to action with campaign materials, and sets campaign deadlines with the group.

Sample Agenda - 10 Minutes in Length

Introduction - 2 Minutes
Have your CEO give a brief overview of the company’s efforts for the campaign.

United Way Representative Presentation — 3 Minutes
The United Way representative will give a brief overview United Way.

Impact Presentation — 4 Minutes
Speaker will present a story about a person or family that has benefited from services provided by United Way.

Closing — 1 Minute
Campaign Champion thanks everyone for their time, invites participation through a call to action with campaign materials, and sets campaign deadlines with the group.

Sample Agenda - 25 Minutes in Length

Introduction - 2 Minutes
Have your CEO give a brief overview of the company’s efforts for the campaign.

United Way Representative Presentation — 3 Minutes
The United Way representative will give a brief overview United Way.

Partner Agency Speaker Presentation — 4 Minutes
The Partner Agency speaker will present a story about a person or family that has benefited from services provided by United Way.

Trivia Game - 15 minutes
United Way representative can produce a custom trivia game for your event. Crowd participation from smart phones gives an interactive look at issues in our community and solutions United Way helps to provide.

Closing — 1 Minute
Campaign Champion thanks everyone for their time, invites participation through a call to action with campaign materials, and sets campaign deadlines with the group.
We are happy to customize a PowerPoint for your campaign. Click for a sample and template that can be modified for your specific needs.
COMMUNICATION CENTER: MESSAGES YOU CAN USE

LOGOS

UWSC retains a duty to ensure that its name and logo are being used properly in a manner that is consistent with legal requirements and with its mission, public image and United Way Worldwide (UWW) Brand Identity Guidelines. The UWSC graphics are registered trademarks and must not be altered in any way.

VIDEO

United Way of Story County’s YouTube Channel will be updated with the newest video footage throughout the campaign timeline. Summer learning initiatives, Women United, and specific program snapshots are available.

https://www.youtube.com/user/UnitedWayofStoryCo/videos
Questions? Success stories? Reach out to us!

Office Phone Number: 515-268-5142

Jean Kresse, President and CEO, jkresse@uwstory.org

Kristin Pates, Campaign Director, kpates@uwstory.org

Malai Amfahr, Story County Reads Director, mamfahr@uwstory.org

Jaclyn Anderzhon, Finance Director, janderzhon@uwstory.org

Jerri Baumeister, Women United Director, jbaumeister@uwstory.org

Bailey Pearson, Administrative Assistant, bpearson@uwstory.org

Allie Prusa, Marketing Director, aprusa@uwstory.org

Kelly Wierson, Database Specialist, kwiereson@uwstory.org