

2018

Coordinator & LE Guide

LIVE UNITED

SERVING JEFFERSON, SHELBY, WALKER, BLOUNT AND ST. CLAIR COUNTIES

3600 8TH AVENUE SOUTH P.O BOX 320189 BIRMINGHAM, AL 35232-0189
205.251.5131 FAX 205.323.8730



United Way
of Central Alabama, Inc.



**UNITED, WE IMPROVE LIVES IN
OUR COMMUNITY.**

LIVE UNITED®

THE VALUE OF UNITED WAY

United Way fights for the health, education and financial stability of every person in every community. When your organization partners with United Way, donors access the broadest network of people, expertise and resources to achieve lasting change in Central Alabama.

Partner Network

We provide unmatched scale of resources through our partner network.

- 200 partners
- 55,000 donors
- \$38,000,000+ campaign
- \$29,000,000+ grants
- 10,000 volunteers
- 1,000 organizations

Direct Services

We have the heart and capacity to meet immediate needs in our community.

- Primarily funded through government grants
- Emergency response when disasters strike
- Programs and initiatives serve unmet needs

Bold Goals

We achieve Bold Goals by developing strategies and measuring outcomes.

- Aligned partners & resources for solving complex problems
- Tracked outcomes within action networks
- Shared data within coalition, including schools and county



**United Way
of Central Alabama, Inc.**

UNITED, WE IMPROVE LIVES IN OUR COMMUNITY.

LIVE UNITED

2017 HIGHLIGHTS:

Through our partners, innovative programs and Bold Goals Coalition, we improve the health, education and financial stability of every person in Central Alabama.

PARTNER NETWORK



80,854 People

Received access to healthcare

182,933 People

Participated in exercise and nutrition

103,186 Children

Participated in school or community

5,684 Youth

Received practical job-skills

DIRECT SERVICES



588 Veterans

Received homeless-prevention services

169,275 Meals

Were served by 500 Meals on Wheels volunteers

3,345 Returns

Were prepared for qualified individuals for an average tax refund of \$1,471

37,987 Calls

Were received seeking assistance with utilities, taxes, food, housing and more

BOLD GOALS



\$473,000

Was raised for Coalition projects

43,000 Meals

Were served to low-income children during the summer feeding program

Walker County

Waterways and Lake were improved to increase access to outdoor activities

Test Scores

Increased in an after-school program by 2.8 points in reading, 1.7 in math and 3.1 in science

For more information visit
www.uwca.org



United Way
of Central Alabama, Inc.

2018 COMMUNITY INVESTMENTS

LIVE UNITED

United Way of Central Alabama has proudly supported a network of health and human service organizations that meet the needs of our communities. In 2018, UWCA will invest dollars raised from the 2017 annual campaign in the following agencies:

FUNDED PARTNERS	2018 ALLOCATION	FUNDED PARTNERS	2018 ALLOCATION
2-1-1 Information and Referral Program	\$ 197,043	Disability Rights and Resources	\$ 150,748
A.G. Gaston Boys and Girls Club	688,847	Easterseals of the Birmingham Area	175,835
AIDS Alabama	71,903	Family Connection	210,723
Alabama Goodwill Industries	62,757	Family Resource Center of NW Alabama	157,947
Alabama Head Injury Foundation	172,211	Fellowship House	264,988
Alabama Kidney Foundation	113,194	Gateway	1,159,925
Aletheia House	456,054	Girl Scouts of NCA	543,659
Amelia Center	84,670	Girls Inc.	823,876
American Cancer Society	651,101	Glenwood	142,513
American Heart Association	483,729	Habitat for Humanity	355,166
American Red Cross	2,897,374	Hands on Birmingham	195,994
Arc of Jefferson County	624,332	HICA	123,587
Arc of Shelby County	139,637	IMPACT Family Counseling	89,932
Arc of St. Clair County	96,197	Legacy YMCA	96,323
Arc of Walker County	391,738	Levite Jewish Community Center	253,244
Better Basics	167,075	Literacy Council	200,615
Big Brothers Big Sisters	408,418	Oasis, A Counseling Center for Women & Children	89,695
Birmingham Urban League	156,795	Pathways	337,620
Blount County Aid to Homeless Children (DHR)	47,494	Positive Maturity	651,905
Blount County Children's Center	114,701	SafeHouse of Shelby County	125,913
Boy Scouts - Black Warrior Council	80,506	Salvation Army - Birmingham Area Command	1,699,086
Boy Scouts of America - Greater Alabama Council	949,435	Salvation Army - Walker County	100,224
Boys & Girls Clubs of Central Alabama	666,156	Shelby County Children's Advocacy Center	47,031
Cahaba Valley Health Care	45,740	Shelby Emergency Assistance	221,293
Camp Fire	967,157	Sickle Cell Disease Association	127,502
Catholic Family Services	156,283	St. Clair Children's Advocacy Center	43,527
Central Alabama Children's Fund	97,997	St. Clair County Day Program	107,295
Childcare Resources	626,921	St. Clair County DHR	46,373
Children's Aid Society	918,482	Traveler's Aid Society	263,167
Children's of Alabama	608,193	United Ability	736,252
Christian Love Pantry	36,718	United Community Centers	90,564
Collat Jewish Family Services	92,309	Vision Council Grants	489,986
Community Food Bank	352,928	Workshops	747,733
Concerned Citizen's for Our Youth	176,458	YMCA of Birmingham	836,042
Crisis Center	750,272	YWCA	1,536,734
Developing Alabama Youth Foundation	128,667		

For more information visit
www.uwca.org



United Way
of Central Alabama, Inc.

2018 COMMUNITY INVESTMENTS

LIVE UNITED

ADVANCEMENT FUND GRANTS

Intended to provide short-term planning funds laying the groundwork for successful achievement of priority group/action network goals.

BCS Network (Better Basics & Bir. Ed. Found.)	\$10,000
Early Learning Network (Childcare Resources)	10,000
Financial Services Network	10,000
Improving Mental Health Priority Group	10,000
Optimizing Healthcare Access Priority Group	10,000
Promoting Healthy Lifestyles Priority Group	6,100
3rd-Grade Reading Network (Literacy Council)	10,000
3rd-Grade Reading Network 2	10,000

VISION COUNCIL GRANTS

Intended to provide longer-term support for projects that are planned and ready for implementation.

FAFSA (Alabama Possible)	\$ 100,000
3rd Grade Network (Blount Co. Ed. Foundation)	75,000
Jefferson County Collaborative for Health Equity	100,000

SUMMER ADVENTURES IN LEARNING (SAIL) GRANTS

A partnership that focuses on summer programs in which students can explore new interests and skills while also gaining the support they need to prevent summery learning loss.

A.G. Gaston Boys & Girls Club	\$10,500
American Baseball Foundation	5,000
Better Basics 30 A Day	6,000
Blount County Education Foundation	5,000
Boys & Girls Club of Central Alabama Inc.	10,000
Campfire USA Central Alabama Council	3,000
Girls Incorporated of Central Alabama	8,000
IMPACT Family Counseling Inc.	12,500
St. Clair County - Margaret Elementary	7,500
YMCA - Alabaster	12,500
YMCA - Shades Valley/Birmingham Area	10,000
YWCA of Central Alabama	15,000

CENTRAL ALABAMA CHILDREN'S FUND GRANTS

Alabaster City Schools	\$10,000
Birmingham City Schools	36,000
Blount County Schools	15,000
Midfield City Schools	14,365
Oneonta City Schools	8,000
Pelham City Schools	10,000
Pell City Schools	1,000
Shelby County Schools	12,125
Tarrant City Schools	5,000
Trussville City Schools	2,000
Walker County Schools	25,000

DESIGNATIONS TO OTHER HEALTH & HUMAN SERVICE PROVIDERS

Non-Member Agencies	\$2,160,000
Combined Federal Campaign (CFC)	525,000
and State Employees	

UNITED WAY AFFILIATE AGENCIES

Agencies that choose to receive designations only through the United Way campaign.

Alabama Association of Nonprofits	\$48,201
Birmingham Jewish Federation	21,153
CASA of Shelby County	3,156
Lakeside Hospice	18,678
Legal Aid Society of Birmingham	2,871
Ronald McDonald House of Alabama	203,436

DIRECT SERVICES

LIVE UNITED

SERVING OUR COMMUNITY

United Way operates programs and initiatives that help tens of thousands of men, women and children from all walks of life each year. Our work responds to the ever-changing needs in our community by building collaborations, developing critical systems and strategies and putting them into practice at the proper scale.

United Way



United Way's Success By 6 gives hundreds of Pre-K children each year access to quality early learning for improved school readiness, while also promoting health and physical activity through partnerships in Central Alabama. www.uwca.org/successby6



United Way's Priority Veteran provides approximately 700 veterans per year with intensive one-on-one assistance in obtaining affordable housing and resources in order to gain skills and knowledge for long-term financial stability. www.priorityveteran.org



United Way's Financial Stability Partnership includes more than 100 partners statewide, who work together to help hard-working families become and remain financially secure. www.uwca.org/financial-stability-services/



United Way's Free Tax Preparation program provides free income tax preparation to thousands of qualified individuals in Central Alabama. The average refund is \$800 per individual for an economic impact of more than \$2 million per year. www.uwca.org/taxes



United Way's Individual Development Account is an innovative matched savings program, enabling individuals and families to build assets and develop skills for financial self-sufficiency. www.uwca.org/ida



United Way's Area Agency on Aging of Jefferson County provides services that promote and support enhanced quality of life and independence for seniors and the disabled. www.uwaaa.org



United Way's Meals on Wheels provides about 700 meals a day, as well as friendly visits and safety checks, to homebound seniors and the disabled in Jefferson County, enabling them to live with independence and dignity. www.mealsonwheels-jeffco.org



United Way's Healthy Communities promotes active modes of transportation, such as walking and biking, in order to encourage active lifestyles and improve health. www.uwca.org/healthycommunities



United Way's 2-1-1 is part of a statewide network of regional call centers that provide easy access to resources for a wide variety of health and human services available throughout Alabama. www.211connectsalabama.org

For more information, visit
www.uwca.org/our-impact



United Way
of Central Alabama, Inc.



THE BOLD GOALS COALITION

LIVE UNITED

DRIVING A COALITION OF CHANGE IN OUR COMMUNITY

The Bold Goals Coalition of Central Alabama is a community-based initiative, aligning efforts to address specific needs. Key leaders from various organizations address disparities in **education, financial stability and health**. Collectively, they align efforts to create lasting change within our community.

HEALTH

By 2025, the Central Alabama region will be ranked in the top 10 in Alabama for health outcomes as measured by the R.W. Johnson Foundation.

EDUCATION

By 2020, the graduation rate in Central Alabama will be 90% and every student will graduate prepared for college, career, and life.

FINANCIAL STABILITY

By 2025, serve at least 10,000 households through the Financial Services Network.

WORKGROUP CHAIRS

Workgroups, represented by key regional leaders from various industries and organizations, address specific needs in our community. Collectively, each group examines root causes, establishes measurable goals and aligns efforts to create lasting social change. Below lists the workgroup chairs for Bold Goals.

Health

Dr. Dow Briggs
Blue Cross and Blue
Shield of Alabama

Education

Dr. Phil Hammonds
JEFFCO Schools, Retired

Mr. Bill Jones
O'Neal Industries, Retired

Dr. Julie Hannah
Samford University

Financial Stability

Mr. Greg King
IBERIABANK

Mr. Robert Aland
National Bank of Commerce



United Way
of Central Alabama, Inc.

THE POWER OF COLLECTIVE IMPACT

LIVE UNITED

EDUCATION METRIC	NATIONAL			STATE			CENTRAL AL		
	2014	2015	2016	2014	2015	2016	2014	2015	2016
Access to 1st Class Pre-K	28%	29%	29%	12.8%	20.1%	24.8%	7.9%	11.4%	16.0%
3rd Grade Reading				35%	35%	36.7%	36.3%	35.6%	39.1%
3rd Grade Math				52%	54%	59.2%	53.4%	53.4%	58.5%
8th Grade Reading				48%	44%	45.2%	47.0%	51.1%	47.6%
8th Grade Math				29%	27%	31.1%	32.5%	31.9%	35.3%
ACT Score		21	20.8		18.3	18.5		20.9	19.21
Graduation Rate				86%	89%		N/A	89%	
FAFSA Completion				44.7%	45.4%	45.8%		48%	52%
Some College or Assoc. Degree, 18-24	44.9%	45.5%	45.8%	44.7%	45.4%	45.8%	43.7%	44.6%	44.8%
Bachelor's Degree or Higher, 25-34	31.6%	31.9%	32.4%	24.6%	24.9%	25.2%	32.8%	33.1%	33.1%

HEALTH METRIC	NATIONAL			STATE			CENTRAL AL		
	2014	2015	2016	2014	2015	2016	2014	2015	2016
Preventable Hospital Stays	46	41	38	48	46	43	63	60	53
Adult Smoking	14%	14%	14%	14%	14%	16%	22%	22%	17%
Adult Obesity	25%	25%	25%	27%	25%	27%	32%	32%	33%
Access to Primary Care Physicians	1051:1	1045:1	1040:1	1011:1	1000:1	984:1	1224:1	1187:1	1181:1
Access to Mental Health Providers	521:1	386:1	370:1	373:1	318:1	308:1	1421:1	1006:1	946:1
Physical Inactivity	21%	20%	20%	25%	22%	23%	31%	28%	27%
Access to Exercise Opportunities	85%	85%	91%	81%	81%	82%	68%	72%	71%
Food Environment Index	8.7	8.4	8.3	8.7	8.5	8.4	7.1	6.8	6.77

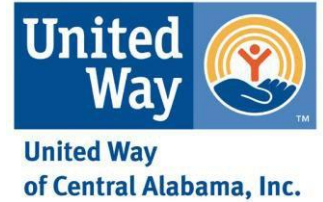
FINANCIAL STABILITY METRIC	NATIONAL			STATE			CENTRAL AL		
	2014	2015	2016	2014	2015	2016	2014	2015	2016
Households Owner Occupied	66.5%	64.9%	64.4%	70.5%	70.0%	64.4%	74.5%	70.0%	69.2%
Fully Banked (Includes Credit Unions)	67%	67%	68%	59.1%	59.1%	60.5%	64%	64%	63.3%
Labor force Participation Rate	77.7%	77.4%	77.2%	72.8%	72.0%	72.0%	75.3%	75.0%	74.5%
Credit Score	666	669	673	651	650	653	648	649	651
Median Household Income	53.0k	53.0k	53.5k	43.2k	43.3k	43.5k	49.5k	49.5k	49.6k
Alt. Financial Services Use, Lifetime	15.7%	15.7%	NR	25.6%	25.6%	NR	18.8%	18.8%	NR
Alt. Financial Services Use, Last 12 Mos	7.0%	7.0%	7.7%	11.9%	11.9%	10.4%	8.9%	8.9%	10.4%



For more information, visit
www.boldgoals.org

United Way
of Central Alabama, Inc.

Campaign Best Practices



Develop a plan for your company campaign that falls within your appropriate timeline & attend United Way events such as trainings, kickoffs and days of service.

Pacesetter: June _____ Fall: September _____

Other Events:

Pacesetter Kickoff, May 31st

United Way Day of Action, June 21st

United Way Kickoff, September 6th

Family Volunteer Day, November 17th

Campaign Celebration, December 6th

Your campaign plan should include a variety of best practices:

➤ **A Winning Team**

Appoint an enthusiastic company coordinator to lead a coordinating committee. The campaign committee should include individuals in your organization who are leaders, respected team players, and dedicated to the success /completion of the job. Recruit different talents and skill sets with a variety of personalities and positions to represent all within your organization. Your Loaned Executive should be



➤ **Campaign Goal & Process**

Analyze your campaign results from last year and build a plan to reach more employees through a specific strategy. Establish a company campaign goal for corporate and employee giving. Develop a system for tracking and reporting results. Utilize UW staff and resources including: ePledge system, coordinator toolkit, and campaign materials/supplies. Organization and documentation is key to a successful campaign close out.

➤ CEO/Management Support

Provide a way for your CEO or manager to publicly support the campaign. Keep the leader or team engaged & involved.

➤ Campaign Meetings

Arrange to have a Loaned Executive or UW staff speak to all employees about United Way. They will share information about the impact in the community & make 'the ask' for supporting United Way. We are prepared to run different types of meetings & rotation schedules if all employees cannot attend the same meeting date/location.

- **Leadership Meeting**—Invite your management and company leaders to a separate leadership event to set the pace for your campaign. Our major gifts team can be present to thank donors & explain matching opportunities.
- **Employee Meeting**—Invite the rest of your employees to join you in reaching your company campaign goal & meeting more needs in the community. The employee meeting & the kick off are sometimes the same event depending on company preference.

➤ United Way Education

Create awareness around UWCA agencies, programs & initiatives. Use your Loaned Executive as a resource & share the mission and the impact of United Way. Your employees can share LIVE UNITED testimonies as well.

- **Tours and Speakers** - Your LE can assist you in scheduling UW partner tours and speakers appropriate for the interests of your employees.
- **Publicize** - Use internal communication tools to keep United Way and community needs top of mind (internal newsletter, bulletin boards, common space).

➤ Recognition & Involvement

People like to be thanked, no matter the method. Find simple ways to say "thank you" by via e-mail, message boards, and personal notes. Provide incentives for increased & first time giving. Thank employees who have given or volunteered. Recognize long-time contributors. Involve retirees in annual solicitation & invite them to campaign events. Involve other specific groups based on the demographics of your employees.



➤ United Way Affinity Groups

Engage your employees by planning events, solicitation or recognition based on affinity groups. We have specific strategies, staff support & events for affinity groups related to:

- Leadership Giving
- Tocqueville Society
- Builder Society
- Women United
- Young Philanthropist Society (YPS)
- Legacy Gifts
- Diamond Donors
- Retirees

See resources included for detailed information on most affinity groups

Diamond Donors

Diamond Donors are individuals who have given to any UW for 25 years or more. You can energize your campaign by incorporating Diamond Donors to share their giving testimony or implement a thank you effort to show appreciation in your employee meetings. Ask individuals to self-identify as a Diamond Donor, and share those names with us.



Retirees

UWCA's Retiree Program provides your former employees a way to stay connected with your company & active in the community. Include Retirees in your campaign with special events & solicitation letters. Recruit a retiree to be an advocate on your campaign team. As seniors, they are one of the fastest-growing segments of our population & often have the greatest capacity & desire to give back to our community. It is easy to get started.

Please contact Nadine Paulmeno for more information, Diamond Donor forms or appreciation certificates & retiree support. npaulmeno@uwca.org

➤ Fun & Engagement

Build enthusiasm in your campaign by offering prizes & facilitating special events appropriate for your company environment. Offer food at your events, competitions, incentives for levels of giving...something different than campaigns of the past. Many companies align events with company picnics, cook-offs, tailgates, anniversaries, & the company's special initiatives. Your LE can help you with some fun ideas for the campaign. Don't forget to include those affinity groups.

Engage your employees by providing an opportunity for them to volunteer in the community. Volunteer projects allow your employees to see community needs first hand. As engaged volunteers, they will likely give at a higher level & get more involved in the community. We have included a resource from Hands On Birmingham to help you with some ideas.



www.uwca.org

➤ **Year-round opportunities**

Implement a plan to thank donors and share UW impact year-round. Some ideas:

1. Volunteer projects
2. Insert a thank you in a company event
3. Use your company newsletter or intranet to share stories & results or focus on testimonies each month
4. Host a lunch & learn about a particular area of United Way, community need/solution or way to get involved
5. Set up agency tours outside of the campaign timeline
6. Recruit employees to serve on an allocations committee

LEADERSHIP GIVING

\$1,000+

LEVELS OF LEADERSHIP

Red Feather	\$1,000 – \$1,999
Silver Feather	\$2,000 – \$3,499
Gold Feather	\$3,500 – \$4,999
Builder Society	\$5,000 – \$9,999
Tocqueville Society	\$10,000 and up

Women United and the **Young Philanthropists Society** work in concert with all leadership groups, with a specific appeal to women and young donors, respectively. Throughout the year the groups host service projects, information sessions and tours of United Way programs and agencies.

Leadership Campaign

Recommended for all companies with 50 or more employees

- Invite management team, high-level executives, and other selected professionals
- Recognize current leadership givers
- Executive endorsement shows the importance of United Way
- Set the pace for a company's campaign
- Ask attendees for a leadership gift and to engage in the upcoming United Way Campaign

United Way assists companies with their leadership campaign by providing:

- High-impact speakers, including local executives and United Way clients
- Campaign collateral and United Way information
- Explanation of step-up matching programs
- Volunteers to assist with Builder and Tocqueville solicitation

Many companies invest in their employees and the community by providing a corporate match to United Way. Both the employee and company are acknowledged for the contribution.

MATCHING PROGRAMS

MAJOR DONORS

Builder Match Builder Society (\$5,000-\$9,999)

Campaign Year	Year you pay	Amount You Pay	Amount of Match	Total Gift
2018	2019	\$2,500	\$2,500	\$5,000
2019	2020	\$3,750	\$1,250	\$5,000
2020	2021	\$5,000	\$0	\$5,000

Meyer Match Tocqueville Society (\$10,000-\$14,999)

Campaign Year	Year you pay	Amount You Pay	Amount of Match	Total Gift
2018	2019	\$5,000	\$5,000	\$10,000
2019	2020	\$7,500	\$2,500	\$10,000
2020	2021	\$10,000	\$0	\$10,000

Stephens Circle Match Stephens Circle (\$15,000-\$24,999)

Campaign Year	Year you pay	Amount You Pay	Amount of Match	Total Gift
2018	2019	\$12,500	\$2,500	\$15,000
2019	2020	\$15,000	\$0	\$15,000

Dunne Circle Match Daniel J Dunne Circle (\$25,000-\$49,999)

Campaign Year	Year you pay	Amount You Pay	Amount of Match	Total Gift
2018	2019	\$15,000	\$10,000	\$25,000
2019	2020	\$20,000	\$5,000	\$25,000
2020	2021	\$25,000	\$0	\$25,000

**If you give a different amount and would like to use a match, United Way staff will help you create a custom matching program to suit your needs.*

TocquevilleSociety@uwca.org or 205-458-2038.



United Way
of Central Alabama, Inc.



WOMEN UNITED

LIVE UNITED

LEADING THE CHARGE ... INSPIRING THE CHANGE

Women United® is a global force of over 70,000 women. We fight for the health, education and financial stability of every person in every community. United Way of Central Alabama has over 1,600 members that contribute \$4 million to the annual campaign.

Together, we will create lasting change to lift up entire communities by helping those who need us most.



Are You Ready to Make Difference?

- **Network** with some of the most service-oriented and influential women in Central Alabama
- **Access** senior leadership and educational sessions to learn more about United Way
- **Engage** your community by volunteering and helping clients at exclusive service events



UNITED WAY OF CENTRAL ALABAMA
WOMEN UNITED®



United Way
of Central Alabama, Inc.

WOMEN UNITED EVENTS

LIVE UNITED

CONNECT

NETWORK WITH LIKE-MINDED YOUNG WOMEN PASSIONATE ABOUT UNITED WAY

MAY
2018 **Women United Spring Social**
Kickoff for Women United.

OCT/NOV
2018 **House Party**
Networking and recruitment event for women to engage with United Way leadership.

QUARTERLY
2018 **Women United Wednesday's**
Lunch and learns focusing on the Bold Goals Coalition.

VOLUNTEER

GIVE TIME AND ENERGY FOR POSITIVE CHANGE IN OUR COMMUNITY

JUN
2018 **United Way Day of Action**
Take action to address a variety of challenges. If you are interested in volunteering on the this day with fellow members of Women United please email WomenUnited@uwca.org.

FALL
2018 **Visiting Allocations Team**
Volunteer to help us make decisions about which community programs will be a good investment of United Way dollars. If you are interested, please visit www.uwca.org/vat. Enrollment begins April 4th.

NOV 17
2018 **Family Volunteer Day**
This day of service is designed to encourage and promote family volunteerism. This event kicks-off the Thanksgiving holiday with families volunteering to serve and build their local community.

GIVE

MAKE A LASTING IMPACT THROUGH LEADERSHIP GIVING



Young Philanthropists Society | \$1,000 minimum contribution
United Way of Central Alabama's leadership giving society for young professionals. Interested? Email yps@uwca.org



Builders Society | \$5,000 minimum contribution
United Way of Central Alabama's first major giving society. Matching funds available. Interested? Email Builders@uwca.org



Tocqueville Society | \$10,000 minimum contribution
United Way of Central Alabama's Tocqueville Society is recognized nationally for its excellence. More than 750 members contribute in order to help support those in need. Matching funds available. Interested? Email TocquevilleSociety@uwca.org.



For more information, visit
www.uwca.org/womenunited

United Way
of Central Alabama, Inc.



YOUNG PHILANTHROPISTS SOCIETY

LIVE UNITED

JOIN TODAY THROUGH YOUR GIFT TO UNITED WAY

The Young Philanthropists Society (YPS) recognizes young leaders who give \$1,000 or more to United Way. Members channel their talents and passion to advance the common good while expanding their social and professional networks.

Benefits of Joining:

- **Volunteer** with peers to better serve our community
- **Engage** with philanthropic leaders and our Tocqueville Society through luncheons and volunteer events
- **Learn** how to advocate for the incredible work of local non-profits
- **Attend** informative events to hear from experts about the challenges facing our community



YOUNG
PHILANTHROPISTS
SOCIETY



United Way
of Central Alabama, Inc.

YPS 2018 EVENTS

LIVE UNITED

CONNECT

NETWORK WITH LIKE-MINDED YOUNG PROFESSIONALS PASSIONATE ABOUT UNITED WAY

QUARTERLY **Agency Tours**

2018

Join members for a lunch-time tour of a United Way agency.

AUGUST

2018

Bold Goals Luncheon

Join members of the Tocqueville Society as we hear an update on the Bold Goals Coalition.

MAY

16

Spring Social

Post work drinks and networking event at Ghost Train Brewing Company.

SEPTEMBER

2018

Happy Hour Kickoff Event

Connect with fellow young professionals and learn more about YPS and United Way as we kickoff the fall campaign.

OCTOBER

17

Panel Discussion

Join us for a lunch and learn this fall taking a deeper look at one of our main focus areas. Topic TBD.

VOLUNTEER

GIVE TIME AND ENERGY FOR POSITIVE CHANGE IN OUR COMMUNITY

MARCH

9

Community Food Bank Project

Take a lunch break and join the Tocqueville volunteers to pack weekend backpacks & mobile food pantry boxes.

FALL

2018

Visiting Allocation Team

Join the team of volunteers helping to review United Way Partner Agencies and assist in allocation distribution. www.uwca.org/vat

JUNE

2018

United Way Day of Action

In partnership with the Tocqueville and Builders Societies and Women United, we will adopt a volunteer project to give back to our community.

DECEMBER

2018

Salvation Army

Volunteer with the Salvation Army on their Angel Tree gift distribution day and meet the families benefitting from this great program.

GIVE

MAKE A LASTING IMPACT THROUGH LEADERSHIP GIVING



Women United | \$1,000 minimum contribution

United Way of Central Alabama's leadership giving society for women. Interested? Email womenunited@uwca.org.



Builders Society | \$5,000 minimum contribution

United Way of Central Alabama's first major giving society. Matching funds available. Interested? Email Builders@uwca.org



Tocqueville Society | \$10,000 minimum contribution

United Way of Central Alabama's Tocqueville Society is recognized nationally for its excellence. More than 700 members contribute in order to help support those in need. Matching funds available. Interested?

Email TocquevilleSociety@uwca.org.



For more information, visit
www.uwca.org/yps

United Way
of Central Alabama, Inc.

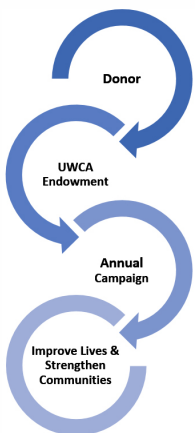


Making Our Community Better

We know you care about our community. You live and work to make it a better place. You give, you advocate and you volunteer. You work for the benefit of others. We know you. You are the person who asks, "What more can I do to help?"

United Way's ability to improve lives, strengthen families, build economic independence and address emerging needs in our community is leveraged and strengthened by its endowment.

How Your Endowment Makes A Difference



- **Gift Options** - Gifts can be cash, stock, IRA/401k distribution, deferred via will or naming United Way as beneficiary of a life insurance policy, IRA or trust.
- **The Endowment** - Generates contributions to the annual campaign, thereby perpetuating the giving vision of the donor.
- **Your Gift** - Improves lives and strengthens the community for future generations by providing long-term resources to address future community needs.

As an investor of our future, the Endowment provides the means to support a vision of community improvement for generations to come. Make your legacy of hope come to life through United Way.

If you have questions, please contact Kathy Briscoe:
E: kbriscoe@uwca.org | P: 205-458-2022 or go to www.uwca.org/legacy.



United Way
of Central Alabama, Inc.

Why People Are Leaving A Legacy Through United Way



"My wife and I setup a life insurance policy with United Way as the beneficiary so we could have a vehicle to endow our gift for the future."

- Mike Warren, Children's of Alabama

"My family and I have been involved with United Way since 1923. My great grandparents endowed their gift, and now 70+ years later, it's still making a difference."

- Walker Jones, Coca-Cola Bottling Company



"During my time as Chairman, we created a way to endow gifts to United Way because we saw the needs of the community were many and we had the means to make a difference."

- Elmer Harris

"I remember our family being involved with United Way since I was a child. The reason we stay involved is because we know it helps make a more secure and better community for our citizens."

- Edward Friend, Sirote and Permutt



"I choose to be part of the Tocqueville Legacy Circle because I feel like it's through the United Way that every part of our community is pulled together and united as one."

- Mallie Ireland



EMPLOYEE ENGAGEMENT OPPORTUNITIES

LIVE[®]

HOST A DRIVE

Hosting a drive is a great way to engage your workplace, civic group or place of worship!

Let us know your area of interest and we will provide you with a list of specific item needs.

- Senior Care Kits- *Meals On Wheels*
- Veteran Care Kits- *Priority Veteran*
- Book Drive- *Better Basics*
- Teacher Classroom Supplies- *Success By 6*
- Pre-K Reading Readiness Kit- *Success By 6*
- Financial Preparedness Kit- *IDA Program*
- Food Drive- *Community Food Bank of Central AL*
- Bunny Aid Easter Basket Drive- *Hands On Birmingham partner agencies*
- Back to School Drive- *Birmingham City Schools and Partner Agencies*

PARTICIPATE IN A DAY OF SERVICE

Hands On Birmingham hosts six days of service each year. Sign up as an individual or group. For more information visit www.handsonbirmingham.org. Sponsorship opportunities available.

- Back-to-School Beautification: Because We Care- August 4, 2018
- 9/11 Week of Service and Remembrance- September 2018
- Family Volunteer Day- November 17, 2018
- Martin Luther King Jr. (MLK) Day of Service- January 21, 2019
- Project Homeless Connect- February 23, 2019
- Navigate Grant- Ongoing projects helping seniors and disabled individuals age in place.

EMPLOYEE ENGAGEMENT OPPORTUNITIES

CONNECT WITH ONGOING NEEDS

United Way of Central Alabama and its partner agencies offer a variety of ongoing volunteer opportunities. Let us know if you are interested and we can connect you to the right person.

- Community Food Bank of Central Alabama- *Sorting food donations*
- Pathways Women's Shelter- *Serving lunch*
- Safe Routes to School- *Walking School Bus and Bicycle Rodeo*
- Area Agency on Aging- *SHIP and SeniorRX*
- Better Basics-*Reading/ Tutoring*
- Big Brothers Big Sisters of Greater Birmingham- *Mentoring*
- Girls, Inc. of Central Alabama- *Mentoring or tutoring*
- Visiting Allocations Team- *A time commitment of approximately 10 – 12 hours (typically 3 meetings) between late September and early November.*
- VITA Tax Preparation- *Certification necessary*
- Meals On Wheels- *Delivering meals to homebound seniors*
- 2-1-1 Call Center-*Training required*

QUESTIONS REGARDING VOLUNTEERING?

If you have additional questions regarding volunteer opportunities with United Way of Central Alabama, please contact volunteer@handsonbirmingham.org or call 205.251.5849.

YOU'RE INVITED



Ignite is a Hands On Birmingham event committed to recognizing and celebrating outstanding volunteer service. Those who volunteer for the betterment of their community, is something Hands on Birmingham will recognize and support on an ongoing basis. While their actions go largely unrecognized, volunteers are truly the “heart of the community”. Ignite was created to celebrate the grassroots level Volunteer, the Leaders Making a Difference in our community that can be seen everywhere.

Website: www.handsonbirmingham.org or www.uwca.org/volunteer

Phone: 2015251.5849

2018 HOT TOPICS/TRENDING BUZZ

LIVE UNITED

Occasionally there are issues in the news, rumors, and urban legends about United Way that need addressing; these are called our hot topics. Other subject matter may not be negative; they are just the latest news that might be related to key relationships or programs. Some people want to use a hot topic or buzz as an excuse not to support our work. It is best to give the person asking the question a simple answer and move on.

If they want to discuss the issue further, refer them to Samuella Nesbitt, Sr. Vice-President, Public Relations, 205-458-2050 or 205-613-5373. They can also email their concerns to snesbitt@uwca.org.

Can you explain why the Boy Scouts changed its name and began admitting girls?

The organization is entering a new era. It is important that all youth can see themselves in Scouting in every way possible. They recently announced that **Scouts BSA** is the new name for the Boy Scouts program. Scouts BSA perfectly represents the new, inclusive program for older Scouts that the Boy Scouts of America is proud to offer. The name change will be effective in **February 2019** when girls will be welcomed into the program. The new recruitment campaign called is called **Scout Me In**. The tagline celebrates the BSA's historic decision to serve families and welcome girls and boys into Scouting so they can experience the character-building fun and adventure the program brings to life in communities across the country. For more information, visit the Scouts website at Scouting.org.

How will the new tax regulations influence my ability to take deductions for my charitable giving?

Changes in individual tax rates and charitable deductions are top of mind for nonprofit organizations. At United Way, we know our loyal donors do not give for the tax benefit, they give out of generosity.

The [tax plan](#) nearly doubles the standard deduction for individuals and families. That makes a more generous standard deduction and means many Americans might not go through the process of itemizing.

However, for individuals who are accustomed to itemizing and deducting their charitable donations to organizations, like United Way, we hope it will not affect their giving. We need our donors to continue their support of United Way and its agencies and initiatives so we don't lose the progress we've made and so we can serve even more of our neighbors in need.

Is United Way expanding into a new building?

United Way of Central Alabama has purchased the 35,000 sq. ft. former Ram Tool office building located at 3620 Eighth Avenue South, which is adjacent to its current administration building.

United Way community services will be the first to occupy the new space. They are currently housed in the administration building and at other locations. These services include Priority Veteran, Meals on Wheels, AAA Senior Services of Jefferson County, 2-1-1 Information Call Center, Success By 6 and The Crisis Center, a partner agency.

Housing these programs has pushed our current building capacity to its limits. Purchasing the building next door will allow us to create a 'Human Services Campus' using both buildings in the Avondale community.

Does United Way endorse political candidates?

No. In order to maintain its tax-exempt status nonprofits cannot engage in "political campaign activity" and if it does, IRS regulations mandate that the charitable nonprofit lose its tax-exempt status. Endorsements defined by the IRS include sponsoring appearances, sponsoring debates, doing work on a political party's platform, contributing time and money or distributing campaign literature. Employees of a nonprofit can of course contribute their personal time and money as long as they are not perceived as representing the nonprofit.

Where can I get a nonbiased opinion about United Way's financial health and accountability?

It is always good to research any charitable organization that seeks your contributions. Reading their printed material and browsing their website is a good place to begin. For nonbiased evaluations, you might consider following independent organizations that are the industry's watchdogs. Check if the charity is trustworthy by contacting the Better Business Bureau's (BBB) Wise Giving Alliance, Charity Navigator, Charity Watch, or Guide Star. All of these organizations have websites with reports. United Way has received 16 consecutive 4-star ratings (the highest) from Charity Navigator.

Will the proposed 2019 federal budget impact services that struggling Alabamians need?

According to an independent, Alabama-based research organization the most recent budget plan would cut SNAP assistance, which helps one in five Alabama families put food on the table. It would cost Alabama millions in federal funding for affordable housing next year. In addition, it would cut hundreds of billions of dollars by 2028 from Medicaid, which provides health coverage for one in five Alabamians – almost all of whom are children, seniors, pregnant women, or people with disabilities. That is why, now more than ever, our agencies, programs and initiatives need your financial support.

United Way supports legislation that will ensure individuals and families have the resources and opportunities they need to reach their full potential.

Does United Way of Central Alabama support Planned Parenthood?

No. United Way of Central Alabama does not provide financial support to Planned Parenthood or any agencies, initiatives or programs that fund abortions.

What about United Way Worldwide and other local United Ways?

United Way Worldwide, the leadership and support organization for the network of local United Ways, does not provide financial support to Planned Parenthood. All funding decisions are made by individual United Ways based on local community standards. In those cities where Planned Parenthood does receive support, the programs focus on community health maintenance and strengthening services like counseling and family life education. No United Way Worldwide funds are currently used or have ever been used to support abortion services.

How are the salaries of your top executives determined?

The Board of Directors of United Way of Central Alabama, Inc., made up of community volunteers, establishes the budget for United Way, which includes salaries for staff. The Board takes seriously its responsibilities and believes that an organization that manages over \$90 million in assets requires top quality staff.

There is a demand to increase the professionalism of nonprofit executives in order to compete with talent in the for-profit sector. Drew Langloh has over 30 years' experience working for United Ways in North Carolina, Maryland, Delaware and here in Alabama. He has raised \$1 billion dollars for people in need during his career.

His approach is to implement collaborative efforts where agencies, government, corporations, foundations, academia and other groups work together on an issue. His experience and success in fundraising is why United Way of Central Alabama continues to have the resources, reputation, results for addressing the most pressing social problems, and has not become a stagnant organization.

United Way's compensation philosophy is linked to the values of the organization: helping people, accountability, efficiency, and excellence, voluntary giving, integrity and fairness.

Competitive compensation packages are established using the following information:

- Our size and the growing organization complexity of United Way of Central Alabama
- The service area, geographic location and financial condition of the organization
- The qualifications required of the job and compensation at comparable organizations

The Board is committed to full compliance of Section 4958 of the Internal Revenue Code in establishing a reasonable salary structure as a best practice in terms of governance of the organization. United Way of Central Alabama is a healthy, thriving nonprofit with outstanding leadership.

Best Practices Check List

***Team Players:** ___ Human Resources ___ Marketing ___ Information Technology
 ___ Divisional Representatives
 ___ Loaned Executive (include LE in team meetings)
 (# of Team Players depend upon company size: Teams vary from 1-10)

***Payroll Deduction:** ___ Check w/ HR or payroll processor to ensure pledge cards (including electronic) capture all needed information for internal processing.

***Campaign analysis:** ___ Identify past Strengths/Weaknesses ___ Past Campaign Results
 ___ Leadership dollars as % of campaign total
 (Analyze % Payroll Deduction vs. one time pledges; % Leadership Participation; etc.)

COMPANY DATA FOR ANALYSIS	
Total number of donors	Average employee gift
Non-leadership donor count	Total non-leadership gift (less than \$1,000)
Non-leadership average gift	Total leadership gifts (between \$1,000 and \$10,000)
Leadership donor count	Leadership average gift
Tocqueville donor count	Total Tocqueville donors dollars (gifts \$10,000 and greater)
Tocqueville average gift	Corporate gift
Special events proceeds	Matching dollars

***Develop strategies:** ___ Campaign timeline ___ Campaign needs ___ Solicitation methods
 ___ Campaign goal ___ Campaign focus ___ Follow-up solicitation

Most companies can run within a 2 week timeline depending on the size of the company. If collecting results takes longer, the events can at least wrap up in 2 weeks.

WAYS TO GROW YOUR CAMPAIGN:

Increase the % of employees participating:

- Care Day in a UW Partner or Initiative
- Testimonial by an Employee
- Company incentive for Certain Level of Participation
- Join Young Philanthropist, Diamond Donor, or Women's Leadership Programs

Increase the amount of the average Gift:

- Leadership Meeting/Solicitation
- Incentives to those who increase their gift
- Start Internal Recognition Program
- Convert cash to annual payroll deduction pledges

Best Practices Check List

***Identify ways to implement:**

____ LIVE UNITED & other themes ____ Incentives
____ Appropriate method for CEO support (letter/address employees at meeting)
____ Dates for Company events

***Promote campaign and events:**

____ Posters ____ Emails ____ Newsletters ____ Intranet
____ Social Media

Events Include: Kick offs, Volunteer Days, Tours, Leadership Meetings, Employee meetings and Victories/Celebrations)

***Educational Opportunities:**

____ Tours (set up through LE) ____ Volunteer activities ____ Intranet stories
____ Electronic Newsletters (emails) ____ Kick off ____ Social Media posts

Incorporate in your company needs: ____ Guest Speakers ____ LE ____ Brochures ____ UWCA Video

***Engagement Opportunities:**

____ Young Philanthropists Society ____ Diamond Donors
____ Lunch N Learn for UWCA focus area
____ Visiting Allocation Team recruitment
____ Food/book/clothing/school supply drive
____ Volunteer / Serving Opportunity

***Types of Meetings and Solicitation to include:**

LEADERSHIP MEETINGS (invite Company Leadership)

____ Hosted by CEO or high level manager ____ Held over Breakfast/Lunch
____ UW Major Gift staff present to thank donors & share matching opportunities
____ Show UWCA Video ____ LE speak about United Way of Central Alabama
____ Invite a Leadership Speaker (set up through LE)
____ Ask leadership to lead the campaign by contributing today at a Leadership Level

EMPLOYEE MEETINGS

____ Hold employee meeting with entire group or by division/department

Sample UWCA Meeting Agenda

Welcome	Coordinator
Endorsement	CEO or upper management
United Way Education	Loaned Executive
<i>*if an additional speaker, insert here</i>	
United Way Ask	Loaned Executive
LIVE UNITED/ <i>giving</i> testimonies	Employees
Thank you	Loaned Executive & Coordinator

**video can be used after Welcome or during UW education or testimonies
Coordinators can share pledging & incentive details in the meeting as well.*

Best Practices Check List

OTHER SOLICITATION IDEAS

- ☐ Retiree Letter Campaign
 ☐ After Hours Social for retirees
☐ New Hire Packets are available year round for new employees
☐ Peer to Peer

*Campaign Process:

Designate a team member responsible to:

- ☐ collect pledge cards
 ☐ submit cash/checks to UW LE throughout timeline
☐ compile results
 ☐ confirm the corporate pledge
☐ submit payroll copies to HR
 ☐ announce status of pledges throughout timeline
☐ enter data on spreadsheet (Many companies use a spreadsheet—please use the example below from the website if submitting results electronically)

*Process for turning in results:

Prior to LE Pick-Up or Electronic Submission:

- ☐ Gather all pledge cards
☐ Sort by pledge type (payroll, cash/check, credit card, stock, etc)
☐ Total \$ and # of pledges for each type
☐ Finalize corporate dollars (including *company* matches)
☐ Provide the following information when applicable

(See sample below or go to www.uwca.org/campaignmaterials for electronic template)

First Name	Last Name	Street	City	ST	Zip	Email	Pledge Type	Donor Pledge	Company Match	DesgAmt1	Agency Name 1	Agency Cdde	Recognition Name	Young Philanthropists/Diamond Donor?
Mary	Smith	123 Main St	Leeds	AL	35111	Mary1@gmail.com	Payroll	\$50	\$50	\$50	Children's Hospital	A0024124	Mr. and Mrs. John Smith	Y-Diamond Donor

Turning in Results (3 options):

*Paper

- ☐ Fill out provided envelopes
☐ Have LE pickup signed/sealed envelopes

*Electronic

- ☐ Fill out provided Spreadsheet
☐ Submit results to:
campaignresults@uwca.org

*Epledge

- ☐ Follow the instructions from the demonstration

*Thank everyone for participation:

- ☐ THANK YOU Victory Celebration
 ☐ THANK YOU hand-written notes
☐ THANK YOU e-mail
 ☐ THANK YOU letter from CEO

* Debrief for next year:

- ☐ save file or binder to pass on to co-coordinator for next year
☐ meet with team & UW staff representative to debrief for next year