

GIVE
HOPE
CHANGE
LIVES

2021 COORDINATOR & LE GUIDE

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

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205.251.5131 FAX 205.323.8730



United Way
of Central Alabama, Inc.

INVESTMENTS & OUTCOMES



United Way
of Central Alabama, Inc.

During these unprecedented times, your gifts made a difference. Thank you!



Answering the Calls for Help

54,317 2-1-1 calls were received with 74% of those since mid-March

9,243 calls were received through United Way's 1-800-AGE-LINE

4,000 calls were answered by The Crisis Center in one month alone from individuals contemplating suicide



Helping At-Risk Individuals and Families

592,973 senior meals were provided during the pandemic

103 veterans were served and 70 without access to shelters were housed in hotels

7,688 respite hours were provided to 187 caregivers



Crisis Fund Helps Ensure Vital Services

\$2,151,597 in grants were distributed to fund individuals and nonprofits for pandemic relief

52% of crisis funds raised went to Nonprofit Sustainability Fund

48% of crisis funds raised went to the Human Needs Assistance Fund



Partner Agencies Adapt to Pandemic

542 children were served through the YMCA's School Support Academy and Emergency Childcare Program

18,250,000 meals were provided through the Community Food Bank of Central Alabama

221 blood drives were held by American Red Cross in response to the pandemic

2021 Allocations

United Way of Central Alabama (UWCA) has proudly supported a network of health and human service organizations that meet the needs of our community. In 2021, UWCA will invest dollars raised from the 2020 annual campaign in the following agencies:

Partner Agency	2021 Allocation	Partner Agency	2021 Allocation
2-1-1 Information and Referral Program.....	\$200,000	Girls Inc.....	\$719,991
A.G. Gaston Boys and Girls Club.....	602,689	Glenwood.....	128,235
AIDS Alabama	65,424	Habitat for Humanity	311,998
Alabama Goodwill Industries	58,173	HICA	110,303
Alabama Head Injury Foundation	154,052	IMPACT Family Counseling	81,833
Alabama Kidney Foundation	101,294	Lakeside Hospice.....	24,300
Aletheia House	399,416	Legacy YMCA	86,864
Amelia Center.....	77,262	Legal Aid Society.....	21,938
American Cancer Society	569,216	Levite Jewish Community Center	222,263
American Heart Association	423,815	Literacy Council.....	179,087
American Red Cross	2,519,873	Oasis, A Counseling Center for Women & Children	81,628
Arc of Central Alabama	545,351	Pathways	298,859
Arc of Shelby County	125,073	Positive Maturity	570,200
Arc of St. Clair County.....	43,289	Ronald McDonald House.....	124,820
Arc of Walker County	344,741	SafeHouse of Shelby County.....	113,091
Better Basics	150,195	Salvation Army - Birmingham Area Command	1,480,852
Big Brothers Big Sisters.....	358,855	Salvation Army - Walker County	87,962
Birmingham Jewish Federation	25,249	Shelby County Children's Advocacy Center.....	45,068
Birmingham Urban League.....	141,116	Shelby Emergency Assistance	196,189
Blount County Aid to Homeless Children (DHR)	45,116	Sickle Cell Disease Association	58,608
Blount County Children's Center.....	103,352	St. Clair Children's Advocacy Center.....	41,521
Boy Scouts - Black Warrior Council.....	72,822	St. Clair County Day Program.....	95,725
Boy Scouts of America - Greater Alabama Council	825,513	St. Clair County DHR	43,695
Boys & Girls Clubs of Central Alabama	583,155	Travelers Aid Society	232,208
Cahaba Valley Health Care.....	44,939	United Ability	642,579
Camp Fire	845,397	United Community Centers	81,508
Catholic Family Services	139,084	United Way Hands On	253,523
Central Alabama Children's Fund	90,000	Summer Adventures in Learning (SAIL)	85,000
Childcare Resources	546,846	Workshops.....	654,738
Children's Aid Society	799,934	YMCA of Birmingham	728,872
Children's of Alabama.....	532,299	YWCA.....	1,339,964
Christian Love Pantry.....	35,754		
Collat Jewish Family Services.....	85,573		
Community Food Bank	311,264		
Concerned Citizens for Our Youth.....	161,258		
Crisis Center.....	655,727		
Developing Alabama Youth Foundation	116,941		
Disability Rights and Resources.....	134,726		
Easterseals of the Birmingham Area	156,341		
Family Connection	188,978		
Family Resource Center of NW Alabama	142,177		
Fellowship House.....	234,148		
Gateway	1,008,788		
Girl Scouts of NCA	476,739		

Percentage of agency
allocation dollars by impact area

HEALTH..... **33%**

EDUCATION..... **31%**

FINANCIAL STABILITY

ACCESS TO SERVICES..... **26%**

Grants to Other Community Organizations and United Way Programs

Organization/Program	2020	Organization/Program	2020*
Central Alabama Children's Fund:			
Alabaster City Schools.....	\$10,000	Assets for Independence	\$141,879
Birmingham City Schools	19,872	Financial Stability Partnership	103,329
Blount County Schools	11,000	GEAR-UP	67,289
Fairfield City Schools	1,283	Help Me Grow.....	86,600
Hoover City Schools.....	2,766	HUD Housing Counseling	544,499
Jasper City Schools	9,500	Priority Veteran.....	2,125,886
Jefferson County Schools	19,394	Safe Routes to School	7,367
Midfield City Schools	869	Success By 6	239,544
Pelham City Schools.....	10,000	Volunteer Income Tax Assistance	147,784
Pell City Schools	2,000	Walker County Health Initiative	95,325
Oneonta City Schools	4,633		
Shelby County Schools	12,000	Area Agency on Aging:	
Tarrant City Schools.....	940	UWAAA Aging and Disability Resource Center	\$133,920
Walker County Schools.....	14,000	UWAAA Alabama Caregivers	373,435
		UWAAA Supportive Services	537,418
Summer Adventures in Learning:		UWAAA Ombudsman.....	162,327
American Baseball Foundation	\$10,000	UWAAA Preventive Health Program	39,995
Better Basics, Inc.	6,000	UWAAA State Health Insurance Assistance Program ...	117,134
Birmingham Education Foundation	5,000	UWAAA Senior Nutrition Program.....	2,805,794
Blount County Educational Foundation	10,000	UWAAA SenioRx.....	193,497
Boys and Girls Clubs of Central Alabama	13,000	UWAAA Senior Medicare Patrol Project	26,191
Camp Fire	5,000		
Girls Inc.....	8,000	Ryan White Partners:	
Homewood City Schools	4,000	AIDS Alabama	\$1,252,839
IMPACT Family Counseling	10,000	AIDS Alabama South	856,033
The Literacy Council	8,000	Aletheia House	366,899
YMCA-Shades Valley	13,000	Birmingham AIDS Outreach	1,459,049
YWCA of Central Alabama.....	13,000	Five Horizons Health Services	783,043
		Franklin Primary Health Center	615,823
		Health Services Center	442,116
		Medical Advocacy & Outreach	3,005,534
		Mobile County Health Department	494,793
		Selma AIR	667,086
		Thrive Alabama	1,779,817
		UAB Family Clinic	225,910
		Unity Wellness Center	397,182
		USA Family Specialty Clinic.....	47,551
		Whatley Health Services.....	220,095

*2020 Year-End Projected



United Way
of Central Alabama, Inc.

DIRECT SERVICES

LIVE UNITED®

United Way operates a growing number of programs and initiatives that helped **73,049** men, women and children in Central Alabama live healthier, more secure, informed and fulfilled lives in the past year.

EDUCATION



United Way's Success By 6 program gave more than 1,000 area children access to quality Pre-K for enhanced school readiness last year by working with childcare sites to improve their early-learning environment and instruction. www.uwca.org/successby6

HEALTH



United Way's Healthy Communities program promotes active modes of transportation, such as walking and biking, to encourage active lifestyles and improve air quality in Central Alabama. Bike Rodeos and Walk to School events, held throughout the school year, involve thousands of children and volunteers and promote safety and physical activity. www.uwca.org/healthycommunities

FINANCIAL STABILITY



UWCA's Financial Stability Services include: the Individual Development Account for stabilizing assets; Free Tax Preparation, helping families get their full refunds and save on preparation fees; Financial and Housing Education, conducting workshops and one-on-one housing counseling; and Family Stability Services, helping low-to-moderate-income families find and maintain affordable housing. www.uwca.org/fsp



United Way's Housing Alliance is approved by the U.S. Department of Housing and Urban Development (HUD) as a Regional Intermediary, which oversees and supports a network of HUD-approved Housing Counseling agencies that serve thousands in need of housing assistance annually. www.uwca.org/housingalliance

ACCESS TO SERVICES



United Way's Area Agency on Aging of Jefferson County provides programs and services that support enhanced quality of life and independence for seniors and disabled individuals. More than 12,000 were served last year. www.uwaaa.org



United Way's Meals on Wheels currently serves more than 1,500 homebound seniors and disabled individuals in Jefferson County – providing nutritious meals, friendly visits and safety checks that help them live independently with dignity. Hundreds of volunteers delivered 389,496 meals last year and more volunteers are needed! www.mowjeffco.org



United Way's Priority Veteran program serves about 550 U.S. military veterans per year with intensive one-on-one assistance in homeless-prevention services, including obtaining affordable housing as well as the knowledge and skills necessary for long-term financial stability. www.priorityveteran.org



United Way's 2-1-1 Call Center operates 24/7 to assist callers in locating help among a wide range of health and human services in Alabama. The local 2-1-1 Call Center answered more than 54,000 calls last year and is part of a statewide network. www.uwca.org/2-1-1

UNITED WAY FIGHTS FOR THE HEALTH, EDUCATION AND FINANCIAL STABILITY OF EVERY PERSON IN EVERY COMMUNITY. 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 is 200 organizations solving big community problems by aligning partners, resources and agendas. We've been advocating and implementing the power of collective impact since 2013, focusing on advancing the health, education and financial stability of ALL individuals in Central Alabama. The Bold Goals Coalition is helping the community work together differently – more efficiently and more effectively. By taking the long view, tying our work to measurable outcomes and helping partners align resources aimed at achieving big-picture goals, we're building a stronger future for Central Alabama.

HEALTH

By 2025, all Central Alabama counties will be ranked in the top 10 in Alabama for health outcomes as measured by the Robert Wood Johnson Foundation.

EDUCATION

Central Alabama will have 90% of high school seniors college and career-ready, and 125,000 highly skilled adults added to workforce, by 2025.

COALITION LEADERSHIP

Key regional leadership groups 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. Coalition Leadership Chairs for Bold Goals Health and Education are listed below.

Health

Mr. Dan Pile
YMCA
of Greater Birmingham

Dr. David Jones
Capstone Rural
Health Center

Education

Mr. Bill Jones
O'Neal Industries (Retired)

Dr. Melissa Shields
Alabama State Department
of Education



United Way
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BOLD GOALS COALITION PANDEMIC RESPONSE

LIVE UNITED®

Collective impact is all the more important during a crisis, in order to meet our community's most urgent needs. Therefore, as the pandemic continues, the Bold Goals Coalition is focusing on several priority issues where we believe we can see measurable improvements by the end of 2021:

- **Hunger Relief**
- **Mental and Behavioral Health**
- **Student Support**

Needs related to these issues continue to grow due to COVID-19 and require even greater collaboration across organizations, cities, school districts and communities. As we work in these key areas, we will keep equity central to our work and address those communities most directly affected by disparities in health and education. We will bring public attention to these issues, launch innovative programs to address them and advocate for policy changes in the areas that need it most.

ENSURE CRISIS FOOD DISTRIBUTION LOCATIONS ARE WITHIN 10 MILES OF EVERY HOUSEHOLD

Locally, the number of people visiting food pantries and food distribution sites increased from 73,000 in July 2019 to 136,000 in July 2020. We will enhance and expand meal delivery and food distribution programs to create a coordinated network throughout Central Alabama and ensure no one goes hungry.

EXPAND BY 50% THE NUMBER OF CHILDREN RECEIVING MEALS WHEN SCHOOL IS OUT

Nearly 75,000 students in Central Alabama receive free and reduced-price meals during the school year, but need assistance in the summer. Since 2017, the Coalition has launched 18 meal sites serving 1,700+ children daily. Through partnerships with school districts, youth development providers and others, we will further expand service to children when they are out of school.

ENSURE 5,000 ADDITIONAL STUDENTS RECEIVE MENTAL HEALTH SUPPORT SERVICES

We are committed to helping provide comprehensive school-based strategies for addressing students' mental health, including training for staff and screening tools for student assessment as well as direct counseling and mentoring.

ENSURE 1,000 RESIDENTS RECEIVE MENTAL HEALTH SUPPORT THROUGH COALITION PARTNERS

As the pandemic takes its toll, 40% of U.S adults struggle with mental health or substance abuse; and overdose deaths in Jefferson County alone increased 32% in 2020. The Coalition is increasing access to mental health services by helping providers offer virtual counseling, and is uniting partners to combat the opioid crisis in areas of highest need, such as Walker County.

ENSURE EVERY STUDENT CAN ACCESS DIGITAL LEARNING RESOURCES WITHIN 10 MILES OF HOME

There is no high-speed internet in 35% of low-income U.S. homes with children. By investing in devices and creating a network of convenient locations, we can help more children learn remotely and give every student a chance to succeed.

ENROLL 2,000 ADDITIONAL STUDENTS IN SUMMER ACADEMIC ENRICHMENT PROGRAMS

Only 48% of 3rd Graders in Central Alabama read at grade level, which puts them at greater risk of not finishing high school, being underemployed and incarcerated. The pandemic's disruption of learning makes the problem even worse. By expanding the reach of proven youth-development programs, we can help students catch up.

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, June-August

United Way Kickoff, September

Family Volunteer Day, November 20th

Campaign Celebration, December

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 part of the team.



➤ **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:

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

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.

➤ **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 United Way Hands On to help you with some ideas.



➤ **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

The ***J. Mason Davis Society***, ***Women United***, and the ***Young Philanthropists Society***, work in concert with all leadership groups. 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
2021	2022	\$2,500	\$2,500	\$5,000
2022	2023	\$3,750	\$1,250	\$5,000
2023	2024	\$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
2021	2022	\$5,000	\$5,000	\$10,000
2022	2023	\$7,500	\$2,500	\$10,000
2023	2024	\$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
2021	2022	\$12,500	\$2,500	\$15,000
2022	2023	\$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
2021	2022	\$15,000	\$10,000	\$25,000
2022	2023	\$20,000	\$5,000	\$25,000
2023	2024	\$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
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J. MASON DAVIS LEADERSHIP SOCIETY

LIVE UNITED

MAKING A LASTING IMPACT ON CENTRAL ALABAMA

United Way of Central Alabama's J. Mason Davis Leadership Society brings together African American changemakers who give \$1,000 or more to United Way. Members champion diversity and opportunity, and are striving to positively impact the community through a shared affinity for philanthropy, volunteerism and advocacy.



Are You Ready to Make a Difference?

- **Network** with some of the most service-oriented and influential people in Central Alabama.
- **Engage** your community by volunteering and helping clients at exclusive service events.
- **Attend** informative events to hear from experts about challenges facing our community.



UNITED WAY OF CENTRAL ALABAMA
J. MASON DAVIS
 LEADERSHIP SOCIETY

United Way
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YOUNG PHILANTHROPISTS SOCIETY

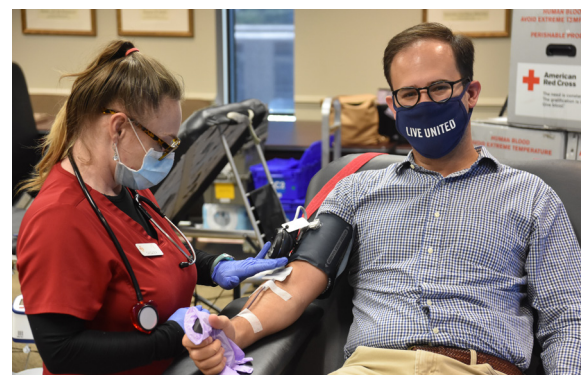
LIVE UNITED

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 through numerous engaging events and volunteer opportunities throughout the year.

Benefits of Joining:

- **Network** with philanthropic leaders and company executives through luncheons and volunteer events.
- **Volunteer** with peers to better serve our community.
- **Learn** how to advocate for the incredible work of local nonprofits.
- **Attend** informative events to hear from experts about the challenges facing our community.



YOUNG
PHILANTHROPISTS
SOCIETY



United Way
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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 a Difference?

- **Network** with some of the most service-oriented and influential women in Central Alabama
- **Engage** your community by volunteering and helping clients at exclusive service events
- **Attend** informative events to hear from experts about challenges facing our community



UNITED WAY OF CENTRAL ALABAMA
WOMEN UNITED®



United Way
of Central Alabama, Inc.

Legacy Gifts

Shape the future...build tomorrow

What do we do?

The Legacy Gifts department raises money for the endowment through current and deferred gift commitments.

Million Dollar Legacy Circle

United Way of Central Alabama recognizes donors who have made commitments to the endowment at the \$1 million level or more through the Million Dollar Legacy Circle. Currently there are 12 members of this circle.

Tocqueville Legacy Circle:

United Way of Central Alabama is home to the second largest Tocqueville Legacy Circle in the country, with more than 100 members who have made a current or deferred gift to endow their annual Tocqueville Society gift (\$250,000 or more).

Legacy Society:

The Legacy Society consists of donors who have made a gift or commitment to the endowment at the \$1,000 or more. Currently the Legacy Society has close to 400 members.

Endowment:

The Legacy Gifts team works hand in hand with our finance department to steward gifts made both to and through United Way's Endowment. Currently our Endowment generates approximately \$300,000 each year to the annual campaign.

How can you help?

If you are interested in learning about ways to endow your annual gift, and/or if you are interested in helping grow our Endowment through solicitations or professional advice, please contact the Legacy Gifts team.

Staff Contact:

Maggie McDonald
Vice President of Legacy Gifts
maggie.mcdonald@uwca.org
205/458-2022 (w)
205/910-9505 (c)

Stirling Hutchins
Legacy Gifts Officer
stirling.hutchins@uwca.org
205/458-2027 (w)
205/332-2467 (c)

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 Philanthropists, Women United or J. Mason Davis Leadership Society

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 ___ J. Mason Davis Leadership Society
___ Visiting Allocation Team recruitment ___ Women United
___ 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

DIGITAL RESOURCES

If your company is still working remotely, has a hybrid work environment, would like to incorporate some virtual items into your campaign or simply need one more pledge form, then this section is for you.

Campaign Materials

<https://www.uwca.org/campaign-center/campaign-materials/>

The campaign materials section on the United Way website includes digital items of our campaign materials including the following:

- Brochure
- Diamond Donors
- Campaign Video
- Agency & Program Videos
- County Information Cards
- United Way Logos & Graphics
- Email Templates
- Social Media Graphics
- Pledge Forms

Virtual Campaign

If your company is unable to run an in-person campaign, consider how you can incorporate these best practices digitally. Recruiting a team to help you coordinate and to set an overall goal for the campaign will continue to be crucial as you make this shift to a virtual campaign.

Communication

- Have a communication plan in place for campaign updates and information
- Utilize United Way's email templates for your campaign. These templates can be found on the United Way website
- Feel free to create your own content to send out to employees from United Way partner agencies, employee testimonials, or additional information to engage with United Way and partner agencies (supply drives, volunteer projects, etc.)

Items Before Kicking Off Your Campaign

- Plan the timeframe of your campaign and which "Best Practices" elements you will incorporate into your digital campaign. Generally speaking, the most successful campaigns run for approximately two weeks.
- Make sure all content is ready to share with employees
- Test the virtual plans (emails, videos, Zoom links, etc.) with Relationship Manager or Loaned Executive

Employee Meeting/Leadership Meeting

- Host your employee meetings and leadership meetings virtually
- A leadership meeting is a specific meeting targeted towards potential donors who would be interested in giving at the leadership level (\$1,000 or more)
- Utilize your company's virtual meeting capabilities (Google Hangout, Zoom, Microsoft teams, etc.)
- United Way has the ability to utilize Zoom for your employee meetings. Reach out to United Way staff for additional information and to coordinate
- Include company leadership in your meeting, if leadership is not available, consider utilizing a pre-recorded video of company leadership discussing the importance and impact of United Way
- Utilize United Way Resources
 - United Way Relationship Manager will plan to attend each of your employee meetings
 - Show the United Way campaign video
 - Incorporate partner agencies in your virtual meeting through pictures/video or live feeds coordinated by the Relationship Manager
- Clearly communicate with employees next steps how to pledge and engage with the campaign
- If you are in the office but practicing social distancing, consider options for a "grab & go" breakfast or lunch if this is normally part of your campaign event

Sample Virtual Campaign Meeting Agenda

Welcome & Opening Remarks from company leadership

Relationship Manager/Loaned Executive shares about United Way mission and shows campaign video

Employee introduces an agency that is important to them

Have representative from partner agency share

Relationship Manager/LE or Coordinator Wraps up and discusses instructions for pledging

Agency Speaker

- United Way has put together a collection of videos from some of our agency partners, the link to these videos can be found on our website. Consider ways to share this video with employees in a virtual meeting or via email
- Invite a speaker from one of our partner agencies to join your virtual meeting

Agency Tour

- Take a virtual tour of an agency through pictures or video. United Way staff can help coordinate getting you this information
- Have a staff member from United Way live stream from a partner agency for a virtual meeting

Agency Fair

- Instead of having multiple agencies set up an in-person fair, consider hosting a virtual lunch-and-learn. While employees are having lunch, they can hear from 3 different agencies
- Give participants the opportunity to ask questions to the agency representatives and sign up for additional opportunities to engage with the represented partner agencies

CEO Endorsement

- Have company leadership speak in as many virtual meetings as possible about importance and impact of United Way for him/her and for the company
- Have the company leadership record a message of why United Way is important to him/her to share at virtual meetings, if he/she is unable to attend the virtual meeting
- Consider sharing multiple video messages from company leadership throughout campaign (campaign kickoff, midway through campaign, campaign wrap-up)

Pledge Form

- Consider making the pledging process completely digital
 - Run an ePledge campaign where pledges can all be made through a secure, online, pledging portal hosted by United Way
 - If you are interested in setting up an ePledge site or would like more information, reach out to your Relationship Manager
- A fillable PDF pledge form can be emailed to employees and this can be emailed to the designated person or printed off and given to the designated person

Thank You

- Consider creative ways to thank those who contributed to the campaign
 - Create a “thank you” committee that leaves a thank you note, surprise, etc. on donor’s desks each day
- Set up thank you posters or banners in your lobby, employee entrance, or break room

Virtual Campaign Timeline

- Kickoff
 - Utilize United Way “swag”, posters, etc. in the company’s lobby or employee entrance to express the start of the campaign
 - Email with a video from CEO talking about why United Way is important to him/her and why he/she looks forward to the company’s campaign
- Host Virtual Employee Meetings
- Host Virtual Leadership Meeting
- Email with an employee testimonial and video reminder from CEO
- Virtual Lunch & Learn with partner agencies
- Have a video that lists out the incentives your company might be offering (time off, gift cards, etc.)
- Wrap up with a thank you video featuring company leadership and a “grab and go” thank you treat

Best Practices Checklist

Execution

- ☐ Implementation of Campaign theme “Give Hope. Change Lives”
- ☐ Incentives
- ☐ Company Leadership support and endorsement (email/video message/sharing at meetings)
- ☐ Dates for events
- ☐ Understand how to run ePledge reports to track progress of campaign
- ☐ Understand how to send pledge information to payroll department/HR

Promotion of Campaign, Events and Materials

- ☐ Posters
- ☐ Email Templates
- ☐ Newsletters
- ☐ Social Media Posts
- ☐ Employee Testimony
- ☐ Brochures
- ☐ Video

ePledge

- ☐ Complete ePledge Checklist; work with United Way staff to complete
- ☐ Submit Employee File to eServices

Campaign Events

- ☐ Campaign Kick Off
- ☐ In person/Virtual Engagement
 - ☐ Agency Tour (through photos or live-streamed)
 - ☐ Agency Fair
 - ☐ Lunch and Learn
 - ☐ Volunteer Opportunities/ Supply Drive
 - ☐ Agency Speaker
- ☐ In person/Virtual Employee Meeting
 - ☐ Have a way for United Way representatives to meet with all employees
- ☐ In person/Virtual Leadership Meeting
 - ☐ Hosted by Company Leadership
 - ☐ Held over Breakfast/Lunch
 - ☐ United Way Major Gift staff present matching opportunities and thank donors
 - ☐ Show Campaign Video
 - ☐ United Way education provided by Loaned Executive or United Way Staff
 - ☐ Work with Loaned Executive to invite a Leadership Speaker
- ☐ Campaign Wrap-Up and Thank you

Additional Engagement Opportunities

- ☐ J. Mason Davis Leadership Society
- ☐ Women United
- ☐ Young Philanthropists Society
- ☐ Visiting Allocation Team
- ☐ Volunteer Project

2021 HOT TOPICS/TRENDING/BUZZ

LIVE UNITED

When there are issues in the news, rumors, and urban legends about United Way - you may be asked to explain them or give United Way's position. These are our **HOT TOPICS**. Not all HOT TOPICS are negative; they can also be the latest good news. 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. They can also email their questions to snesbitt@uwca.org.

GREAT NEWS

Chilton County United Way and United Way of Central Alabama combined efforts to create a six-county regional United Way

United Way of Central Alabama expanded its service area from five to six counties to include Chilton County along with Jefferson, Shelby, Walker, Blount, and St. Clair counties on January 1, 2021.

COVID made it difficult for Chilton County UW to give the money to its agencies they needed and shortly after United Way of Central Alabama President and CEO Drew Langloh approached Chilton County United Way Executive Director Carol Fortuna about merging.

"We feel that joining United Way of Central Alabama will give our agencies, clients, and volunteers greater opportunities and resources," said Mary Mell Smith, Chilton County United Way Board Chairman.

UWCA is ecstatic to serve Chilton County and provide vital services and programs to its residents.

"This is a terrific opportunity for our communities to come together to expand our service area to six counties giving Chilton County and its agencies more resources and opportunities that might not currently be available," said Langloh.

Exceptional Partnerships Key to 2020 Success

The year 2020 was one of the most challenging in United Way of Central Alabama's history. The COVID-19 pandemic unleashed not only a public health crisis but it resulted in economic hardships on those who could least afford it. It also created widespread emotional distress, family separations, isolations, and more.

At its Annual Meeting, outgoing board president Mallie Ireland said United Way was built for times like this. She said its agencies and partnerships through its Community Crisis Fund led them to deliver exceptional services to Central Alabama's most vulnerable residents. "We responded to not only new but unprecedented needs brought on by the pandemic.

"United Way transformed itself to respond to those needs. We will be here in 2021 to provide food and emergency assistance and support its nonprofit partners to create ways to use our resources to help them get back on track," said Drew Langloh.

We know who to help how to help and what to do we will meet the challenge and see a better community on the other side:

Featured accomplishments in 2020 included:

- Supporting our partners to feed the families that are food insecure
- Decreasing the mental health stress with new funding partners such as **Brother Let's Talk** and answering calls for help through the Crisis Center and 211 Information and Referral Call Center
- Funding initiatives that helping children adapt to virtual learning
- Housing more homeless veterans
- Raising over \$36 million for its agencies in Jefferson, Shelby, Walker, St. Clair, Blount, and Chilton Counties

United Way of Central Alabama's (UWCA) Tocqueville Society ranked number one in 2020

The Tocqueville Society is one of the most generous programs in our community. It consists of over 800 members who contribute \$10,000 or more to United Way. After successful efforts left UWCA's Tocqueville Society in the top five for fundraising over the past several years, the charitable program now sits proudly as number one.

Even more outstanding, they did this in a year when the chips were down, and barriers were up.

The success is partly due to their mission, but also because of the incredible community support in Birmingham.

Due to the close nature of our city, we get to know our favorite business owners well. So, seeing them hurt due to hardships brought on by COVID-19 makes the driving force behind volunteer efforts even stronger.

UWCA's Tocqueville Society appoints new chairpersons to lead the group's philanthropic efforts each year. The volunteer-based position is responsible for raising \$13 million and recruiting 75-100 new givers.

UWCA Gets Another Top Rating

UWCA in Charity Navigator's Top 5 with 4 Star Rankings from Charity Navigator, America's largest independent charity evaluator, has ranked the United Way of Central Alabama 2nd nationally on its list of charities with the most consecutive 4-star ratings. For the 18th consecutive year, United Way has earned this top distinction.

Since 2002, using objective analysis, Charity Navigator has awarded only the most fiscally responsible organizations a 4-star rating.

"It's important that our donors trust that we're using their donations wisely to improve health, education and financial stability in Central Alabama," said Drew Langloh, President and CEO. "Our 4-star Charity Navigator rating demonstrates to our supporters our good governance and financial accountability."

"United Way of Central Alabama's exceptional 4-star rating sets it apart from its peers and demonstrates its trustworthiness to the public," according to Michael Thatcher, President & CEO of Charity Navigator. "Only a quarter of charities rated by Charity Navigator receive the distinction of our 4-star rating. This adds UWCA to a preeminent group of charities working to overcome our world's most pressing challenges. Based on its 4-star rating, people can trust that their donations are going to a financially responsible and ethical charity when they decide to support the United Way of Central Alabama."

IN THE NEWS

How is United Way helping the communities and residents impacted by the January 2021 tornado?

In response to the COVID-19 outbreak, United Way of Central Alabama's President and CEO Drew Langloh introduced the establishment of a statewide United Way Community Crisis Fund in March 2020.

The fund was established to help feed people, provide emergency assistance, and support distressed nonprofit agencies serving people negatively impacted by COVID-19.

As of June, the Community Crisis Fund has awarded 90 grants totaling \$664,817. Applications are now being accepted March 1, 2021 for a third round of funding.

United Way invites nonprofit organizations in Central Alabama to submit applications for funding to provide immediate relief. Funds are distributed through two channels: The Human Needs Assistance

Fund and the Nonprofit Sustainability Fund.

Human Needs Assistance Fund

The Human Needs Assistance Fund is designed to supplement agencies' abilities to meet basic human needs during a crisis. These funds help continue feeding programs, shelters, emergency medical transport services, prescription assistance, utility assistance, and more. Also, funding may be available to assist agencies transporting clients to testing sites and for the care of clients directly impacted by the virus.

Nonprofit Sustainability Fund

United Way recognizes that nonprofits are facing financial strain as their abilities to be reimbursed by local governments for their services are diminished due to the pandemic. Limited grants are available to select nonprofit organizations that demonstrate a need for operating funds as a direct result of the COVID-19 pandemic.

Other Response

Our 2-1-1 Information & Referral Center has been assigned by the Alabama Department of Public Health to provide the latest up to date information. This designation is most helpful in underserved areas without internet access and for residents who do not own a computer.

In response to the COVID-19 crisis, the Meals on Wheels program is delivering three-weeks of shelf-stable meals to homebound seniors in Jefferson County once a week to over 1100 vulnerable seniors in Jefferson County. The decrease in visits is an effort to minimize contact between volunteers and clients and lessen the chance of transmitting coronavirus.

MOW is also providing meals to people who are not officially enrolled in the program but are on a waiting list with special donations from individuals and corporations. From March to June there has been a 69% increase in the number of meals served.

Participants in the congregate meal program at community senior centers throughout Jefferson County can pick up their meals curbside.

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 if 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 an excellent 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 these organizations have websites with reports. United Way has received 18 consecutive 4-star ratings (the highest) from Charity Navigator.

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. Individual United Ways make all funding decisions 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 its responsibilities seriously 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 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 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.

3/1/2021 updated