



Coordinator & LE Guide 2023

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

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



Thank you for helping United Way build a better community through programs and services in 2022!



Addressing Hunger One Person at a Time

123,354 meals were served through senior centers in Jefferson County.

408,182 meals were provided to seniors and people with disabilities through United Way's Meals on Wheels program.

531,536 combined meals and groceries were provided through Meals on Wheels and at senior centers to a total of **4,053** clients.



Changing Lives through Student Learning

\$5,734,580 was invested through United Way partner agencies to improve educational opportunities.

1,370 pre-K children were served through **67** Success By 6 classrooms.

354 children and **306** parents were served through Help Me Grow.



Improving Mental Health

80,167 individuals received services to address mental health, substance abuse and domestic violence.

10,678 school-aged children received social-emotional and mental health support services.

68,241 people received crisis intervention services through hotlines and crisis counseling.

\$939,225 in grants was awarded to agencies providing mental health services.



Helping Families

26,946 calls for services were received through United Way's 2-1-1 Call Center.

256 children and **115** families were helped through United Way's Family Stability Services.

558 homeless or at-risk military veterans received help to become housed and financially stable through United Way's Priority Veteran program.

2023 Allocations

United Way of Central Alabama (UWCA) has proudly supported a network of health and human service organizations dedicated to meeting the needs of our community. In 2023, UWCA will invest dollars raised from the 2022 annual campaign in the following agencies.

| Partner Agency | 2023 Allocation | Partner Agency | 2023 Allocation |
|---|-----------------|--|-----------------|
| 2-1-1 Information and Referral Program | \$210,000 | Glenwood | \$136,476 |
| A.G. Gaston Boys and Girls Club | 615,477 | Habitat for Humanity | 321,944 |
| AIDS Alabama | 76,081 | HICA | 121,671 |
| Alabama Goodwill Industries | 69,967 | IMPACT Family Counseling | 90,785 |
| Alabama Head Injury Foundation | 163,288 | Kelsey's Place | 25,000 |
| Alabama Kidney Foundation | 112,662 | Lakeside Hospice | 34,236 |
| Aletheia House | 407,657 | Legacy YMCA | 95,390 |
| Amelia Center | 86,498 | Legal Aid Society | 38,499 |
| American Cancer Society | 577,741 | Levite Jewish Community Center | 230,078 |
| American Heart Association | 430,919 | Literacy Council | 191,875 |
| American Red Cross | 2,519,873 | Oasis, A Counseling Center for Women & Children | 92,996 |
| Arc of Central Alabama | 557,429 | Pathways | 312,358 |
| Arc of Shelby County | 133,314 | Positive Maturity | 580,146 |
| Arc of Walker County | 356,819 | Raleigh's Place | 25,000 |
| Better Basics | 160,852 | Ronald McDonald House | 134,767 |
| Big Brothers Big Sisters | 369,512 | SafeHouse of Shelby County | 124,459 |
| Birmingham Jewish Federation | 29,511 | Salvation Army - Birmingham Area Command | 1,492,219 |
| Birmingham Urban League | 150,067 | Salvation Army - Walker County | 101,461 |
| Blount County Aid to Homeless Children (DHR) | 57,905 | Shelby County Children's Advocacy Center | 54,304 |
| Blount County Children's Center | 114,719 | Shelby Emergency Assistance | 210,399 |
| Boy Scouts - Black Warrior Council | 82,768 | Sickle Cell Disease Association | 72,818 |
| Boy Scouts of America - Greater Alabama Council | 834,465 | SPAN (Special Programming for Achievement Network) | 25,000 |
| Boys & Girls Clubs of Central Alabama | 592,391 | St. Clair Children's Advocacy Center | 50,757 |
| BridgeWays | 855,059 | St. Clair County Day Program | 107,092 |
| Butterfly Bridge - Children's Advocacy Center | 25,000 | St. Clair County DHR | 54,352 |
| Cahaba Valley Health Care | 59,148 | Summer Adventures in Learning (SAIL) | 100,560 |
| Catholic Family Services | 151,162 | Travelers Aid Society | 244,997 |
| Central Alabama Children's Fund | 124,440 | United Ability | 650,394 |
| Central Alabama Wellness | 25,000 | United Community Centers | 93,586 |
| Childcare Resources | 555,372 | United Way Hands On | 266,200 |
| Children's Aid Society | 810,591 | Workshops | 666,532 |
| Children's of Alabama | 539,403 | YMCA of Birmingham | 736,687 |
| Chilton County Emergency Assistance Center | 26,000 | YMCA of Chilton County | 25,000 |
| Christian Love Pantry | 47,122 | YWCA | 1,351,332 |
| Collat Jewish Family Services | 94,098 | | |
| Community Food Bank | 324,053 | | |
| Concerned Citizens for Our Youth | 170,494 | | |
| Crisis Center | 665,389 | | |
| Developing Alabama Youth Foundation | 126,177 | | |
| Disability Rights and Resources | 144,672 | | |
| Easterseals of the Birmingham Area | 165,577 | | |
| Easterseals - West Central Alabama | 25,000 | | |
| Family Connection | 198,925 | | |
| Family Resource Center of NW Alabama | 156,386 | | |
| Family Sunshine Center | 25,000 | | |
| Fellowship House | 245,515 | | |
| Gateway | 1,018,024 | | |
| Girl Scouts of NCA | 485,265 | | |
| Girls Inc. | 729,653 | | |

Grants to Other Community Organizations and United Way Programs

Community Organizations

2022*

Central Alabama Children's Fund:

| | |
|-------------------------------|----------|
| Alabaster City Schools..... | \$13,425 |
| Bessemer City Schools..... | 7,000 |
| Birmingham City Schools..... | 43,000 |
| Blount County Schools..... | 8,202 |
| Fairfield City Schools..... | 3,108 |
| Homewood City Schools..... | 1,768 |
| Hoover City Schools..... | 6,288 |
| Jasper City Schools..... | 2,234 |
| Jefferson County Schools..... | 37,116 |
| Leeds City Schools..... | 2,082 |
| Pelham City Schools..... | 4,925 |
| Pell City Schools..... | 4,022 |
| Oneonta City Schools..... | 1,043 |
| St. Clair County Schools..... | 9,296 |
| Walker County Schools..... | 9,374 |

Summer Adventures in Learning:

| | |
|--|---------|
| American Baseball Foundation..... | \$8,850 |
| Bethel Baptist Church..... | 12,400 |
| Blount County Educational Foundation..... | 27,810 |
| CAMP (College Admissions Made Possible)..... | 14,940 |
| IMPACT Family Counseling..... | 12,500 |
| The Literacy Council (Walker County)..... | 3,500 |
| Sail Testing and Administration..... | 5,000 |

*2021 Year-End

United Way Programs

2022**

| | |
|---|-----------|
| Financial Stability Services..... | 295,011 |
| Help Me Grow..... | 98,988 |
| United Way Housing Alliance..... | 581,305 |
| Priority Veteran..... | 3,023,358 |
| Success By 6..... | 214,569 |
| United Way Free Tax Preparation..... | 219,429 |
| Walker County Health Initiative..... | 17,171 |
| Meals on Wheels..... | 569,541 |
| COVID Response Wraparound Services..... | 441,133 |
| 2-1-1 Information and Referral..... | 152,940 |
| Birmingham City Schools Tutoring Partnership..... | 256,528 |

Area Agency on Aging:

| | |
|--|-----------|
| UWAAA Aging and Disability Resource Center..... | \$63,879 |
| UWAAA Alabama Caregivers..... | 515,078 |
| UWAAA Supportive Services..... | 685,197 |
| UWAAA Ombudsman..... | 208,165 |
| UWAAA Preventive Health Program..... | 78,881 |
| UWAAA State Health Insurance Assistance Program..... | 127,762 |
| UWAAA Senior Nutrition Program..... | 2,842,130 |
| UWAAA SenioRx..... | 179,238 |
| UWAAA Senior Medicare Patrol Project..... | 31,144 |

Ryan White Partners:

| | |
|--------------------------------------|-------------|
| AIDS Alabama..... | \$1,720,701 |
| AIDS Alabama South..... | 1,648,924 |
| Aletheia House..... | 779,234 |
| Birmingham Aids Outreach..... | 2,076,689 |
| Cahaba Medical Center..... | 12,423 |
| Five Horizons Health Services..... | 695,595 |
| Franklin Primary Health Center..... | 461,496 |
| Health Services Center..... | 627,304 |
| Medical Advocacy & Outreach..... | 2,258,059 |
| Mobile County Health Department..... | 1,108,774 |
| Selma Air..... | 792,239 |
| Thrive Alabama..... | 2,137,240 |
| UAB Family Clinic..... | 350,431 |
| Unity Wellness Center..... | 408,700 |
| Whatley Health Services..... | 227,846 |

**2022 Year-End Projected

COMMUNITY INITIATIVES

LIVE UNITED®

United Way of Central Alabama operates programs and initiatives that helped more than 50,000 people of all ages last year. We respond to ever-changing needs for human services in our community through collaboration with experts, strategic planning, implementation of solutions and scaling of services to large populations.



United Way's Success By 6 program gave 1,370 pre-K children access to quality early learning for improved school readiness last year while also promoting health and physical activity. uwca.org/successby6



Help Me Grow Alabama connects parents to resources concerning child development and offers access to developmental screening for children up to eight years old. The program served 660 clients last year. uwca.org/helpmegrow



In partnership with the Alabama and Jefferson County Departments of Health, United Way's COVID Response program allows those who have tested positive for COVID-19 to safely isolate and receive essential services, including housing and food.



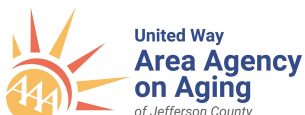
UWCA's Financial Stability Services help hard-working families become and remain financially secure. Programs include Financial and Housing Education, Free Tax Preparation and Family Stability Services. uwca.org/fss



United Way's Housing Alliance is a regional HUD intermediary, partnering with approved housing counseling agencies across the Southeast to help more people realize their housing goals. uwca.org/housingalliance



United Way's Priority Veteran program serves about 500 local military veterans per year, providing one-on-one assistance in homeless prevention as well as help obtaining affordable housing and achieving financial stability. priorityveteran.org



United Way's Area Agency on Aging provides services that enhance the quality of life and independence of seniors and people with disabilities. These include: the Aging & Disability Resource Center; Alabama Cares; Homemaker & Personal Care; Legal Assistance; Nutrition Counseling; Older Relative Caregiver Program; Long-Term Care Ombudsman; Preventive Health; Senior Medicare Patrol; Senior Nutrition; State Health Insurance Assistance Program (SHIP); and Supplemental Nutrition Assistance Program (SNAP). uwaaa.org



With the help of nearly 700 dedicated volunteers, United Way's Meals on Wheels provides meals and safety checks to almost 2,000 homebound seniors in Jefferson County five days a week, helping them live independently with dignity. mowjeffco.org



United Way's 2-1-1 Call Center operates 24/7 connecting callers to a vast range of health and human services in Alabama. Our Call Center answered approximately 27,000 inquiries last year and is part of a statewide network. uwca.org/2-1-1

uwca.org/our-work





THE BOLD GOALS COALITION

LIVE UNITED®

DRIVING A COALITION OF CHANGE IN OUR COMMUNITY

The Bold Goals Coalition takes on large, systemic issues by building partnerships that accelerate lasting change.

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, 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

Dr. Melissa Shields
Alabama State Department
of Education

Steering Committee

Greg King
First Horizon Bank



BOLD GOALS COALITION PRIORITIES

LIVE UNITED®

Collective impact is critical when you're trying to solve our community's most urgent needs. Therefore, the Bold Goals Coalition is focusing on several priority issues where we believe we can accomplish measurable outcomes and achieve tangible improvements:

- Early Education and Childcare
- Mental and Behavioral Health
- Hunger Relief
- Student Support

Needs related to these issues grew 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.

INCREASE 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 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.

IMPROVE THE CAPACITY AND QUALITY OF CHILDCARE

In Central Alabama, there is a shortage of 22,690 childcare slots needed to meet community needs. We support childcare providers by equipping owners and operators with the knowledge, skills and tools to improve business operations, program quality and child education outcomes. We are working to build a first-class childcare system across Central Alabama and ensure all children enter kindergarten ready to learn.

INCREASE THE NUMBER OF CHILDREN IN ALABAMA'S FIRST CLASS PRE-K PROGRAM

Only 44% of four-year-olds in Alabama have access to a First Class Pre-K Program. The Bold Goals Coalition is working to increase early education availability in Central Alabama and expand access to Alabama's First Class Pre-K program to help more children receive the early support they need to be successful in school and beyond.

PROVIDE ADDITIONAL ACADEMIC ENRICHMENT PROGRAMS FOR STUDENTS

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 boldgoals.org.



CELEBRATE 100 YEARS OF LASTING CHANGE IN CENTRAL ALABAMA



AT CITY WALK BHAM / JUNE 24TH, 2023 FROM 3-8 PM

LIVE MUSIC • FOOD TRUCKS • KIDS ZONE • ART • SPORTS GAMES

**MOON TAXI • ACT OF CONGRESS • LOS DESTAKADOS BAND
DJ GAP • THE ZULU CONNECTION • GOOD VIBEZ
FLY DAVE AND THE PARTY ROCKERS • LYNDEN BLAKE
BIRMINGHAM STALLIONS • BIRMINGHAM SQUADRON
BIRMINGHAM LEGION • BIRMINGHAM BARONS
BIRMINGHAM BULLS**

THIS IS A FREE EVENT!



Scan this QR code to register
for the event or visit:
uwca.org/100years

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CAMPAIGN BEST PRACTICES

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

- **Pacesetter Campaign: June 12 – August 11**
- **Fall Campaign: September 7 – November 17**

OTHER EVENTS

- **Centennial Celebration and Pacesetter Kickoff – June 24**
- **United Way Kickoff – September 7**
- **Campaign Celebration – December TBD**

Your campaign plan should include a variety of best practices:

A WINNING TEAM

Recruit an enthusiastic team of company coordinators to serve on your campaign committee. The committee should include individuals in your organization who are leaders, respected team players, and dedicated to the success and completion of the job. Recruit different talents and skillsets with a variety of personalities and positions to represent all within your organization. Your Loaned Executive should also be part of your committee.



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 United Way staff and resources, including the ePledge system, the coordinator toolkit, and campaign materials and supplies. Organization and documentation are key to successfully closing out the campaign, too!

CEO/MANAGEMENT SUPPORT

Provide a way for your CEO or management team to publicly support the campaign. Keep them engaged and involved in campaign activities and results. Encourage and provide ways for them to publicly support the campaign.



CAMPAIGN MEETINGS



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

Types of Campaign Meetings

- Leadership Meeting**
 Invite your management and company leaders to a separate leadership event to make their contribution and set the pace for the rest of your campaign. Our major gifts team can be present to thank donors and explain matching opportunities.
- Employee Meeting**
 Invite all employees to a United Way meeting to learn how they can help meet the needs of the community and reach your company campaign goal. The employee meeting and kickoff are sometimes the same event, depending on company preference.

UNITED WAY EDUCATION

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

- Agency Speakers**
 Work with your Loaned Executive to schedule a United Way partner agency speaker for your leadership and/or employee meetings.
- Agency Tours**
 Your LE can assist you in scheduling a tour of one of United Way’s partner agencies.
- Communication Tools**
 Use your company’s internal communications tools to keep United Way and community needs top of mind—internal newsletters, bulletin boards, common spaces, etc.

RECOGNITION & INVOLVEMENT

People like to be thanked, no matter the method. Find simple ways to say “thank you” to those who participated in the campaign via e-mail, message boards, and personal notes. Provide incentives for increased and first-time givers. Thank employees who contributed to the campaign and who volunteered their time. Recognize long-time donors, and involve retirees in annual solicitation and invitations to campaign events.



UNITED WAY AFFINITY GROUPS

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

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

Diamond Donors

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

Retirees

UWCA’s Retiree Program provides your former employees a way to stay connected with your company and active in the community. Include retirees in your campaign with special events and 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 and often have the greatest capacity and desire to give back to our community. It’s easy to get started!

FUN & ENGAGEMENT

Build enthusiasm for your campaign by offering prizes and facilitating special events appropriate for your company environment—offer food at your events, create competitions, provide incentives for giving, etc. Many companies align events with company picnics, cookoffs, tailgates, anniversaries, and the company's special initiatives. Your LE can help you develop new and exciting ideas for the campaign. Don't forget to include affinity groups!



VOLUNTEER OPPORTUNITIES



Engage your employees by providing an opportunity for them to volunteer in the community. Volunteer projects allow employees to see the community's needs firsthand. As engaged volunteers, they will likely give at a higher level and get more involved in the community. This document includes a resource from United Way Hands On to help you with some ideas.

Year-round Engagement Opportunities

Implement a plan to thank donors and to share United Way's impact outside of the campaign season. Some ideas include:

- Offer **volunteer projects**
- Include a **thank you** in a company event
- Use your company **newsletter or intranet** to share stories and results from the campaign or focus on **United Way testimonies** once a month
- Host a **Lunch & Learn** about a particular area of United Way, community need, or a way to get involved in the community
- Set up **agency tours** outside of the campaign timeline
- Recruit employees to serve on a **Visiting Allocations Team**

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 |
|---------------|--------------|----------------|-----------------|------------|
| 2023 | 2024 | \$2,500 | \$2,500 | \$5,000 |
| 2024 | 2025 | \$3,750 | \$1,250 | \$5,000 |
| 2025 | 2026 | \$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 |
|---------------|--------------|----------------|-----------------|------------|
| 2023 | 2024 | \$5,000 | \$5,000 | \$10,000 |
| 2024 | 2025 | \$7,500 | \$2,500 | \$10,000 |
| 2025 | 2026 | \$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 |
|---------------|--------------|----------------|-----------------|------------|
| 2023 | 2024 | \$12,500 | \$2,500 | \$15,000 |
| 2024 | 2025 | \$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 |
|---------------|--------------|----------------|-----------------|------------|
| 2023 | 2024 | \$15,000 | \$10,000 | \$25,000 |
| 2024 | 2025 | \$20,000 | \$5,000 | \$25,000 |
| 2025 | 2026 | \$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.





J. MASON DAVIS LEADERSHIP SOCIETY

LIVE UNITED

Are you interested in making a difference and wanting to make an impact in your community? Join the J. Mason Davis Leadership Society!

MAKING A LASTING IMPACT ON CENTRAL ALABAMA

United Way of Central Alabama's J. Mason Davis Leadership Society brings together changemakers who want to amplify black voices in the philanthropic space by giving an annual gift of \$1,000 or more to United Way. JMDLS strives to positively impact the community through a shared affinity for philanthropy, volunteerism and advocacy.

Currently there are 223 Regions employees that are J. Mason Davis Leadership Society members.

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





WOMEN UNITED

LIVE UNITED

LEADING THE CHARGE ... INSPIRING THE CHANGE

Women United members donate \$1,000 or more to UWCA annually to provide individuals and families the tools they need to become financially stable, help ensure children are ready to succeed in school and offer opportunities for healthier lifestyles.

Our mission is simple yet bold: to inspire, educate and motivate women to become positive change-agents within our community through philanthropy, leadership and volunteerism. 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 other service-oriented, influential women in Central Alabama.
- **Volunteer** with Women United members to better serve our community.
- **Attend** informative events to hear from experts about challenges facing our community and how you can be a part of the solution.



For more information, contact
womenunited@uwca.org.

UNITED WAY OF CENTRAL ALABAMA
WOMEN UNITED





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.



500+ members
more than
\$1.7 contributed annually

YOUNG
PHILANTHROPISTS
SOCIETY



GIVE

MAKE A LASTING IMPACT THROUGH LEADERSHIP GIVING



Tocqueville Society | \$10,000 minimum contribution

United Way of Central Alabama's Tocqueville Society is recognized nationally for its excellence. More than 900 members contribute in order to help support those in need. Matching funds available. Interested?

Email TocquevilleSociety@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.



J. Mason Davis | \$1,000 minimum contribution

United Way of Central Alabama's J. Mason Davis Society brings together African American changemakers who champion diversity and opportunity, and are striving to positively impact the community through a shared affinity for philanthropy, volunteerism and advocacy. Interested? Email jmdleadershipsociety@uwca.org.



Women United | \$1,000 minimum contribution

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

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

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)

Liz Edwards
Legacy Gifts Officer
liz.edwards@uwca.org
205/458-2027 (w)
205/821-1000 (c)

BEST PRACTICES CHECKLIST

- **Team Players**

Number of Team Players depends on company size; teams can vary from 1-10

- ☐ Human Resources
- ☐ Divisional Representatives
- ☐ Marketing
- ☐ Information Technology
- ☐ Loaned Executive (include in team meetings)

- **Payroll Deduction**

- ☐ Check with HR or payroll processor to ensure pledge cards (including ePledge) capture all needed information for internal processing

- **Campaign Analysis**

Analyze % of payroll deducted gifts vs. one-time pledges; % of leadership participation, etc.

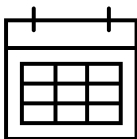
- ☐ Identify past strengths/weaknesses
- ☐ Leadership dollars' % of campaign total
- ☐ Last year's campaign results

Company Data for Campaign 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 (\$1,000+) |
| • Leadership donor count | • Average leadership gift |
| • Tocqueville donor count | • Total Tocqueville dollars (gifts \$10,000+) |
| • Tocqueville average gift | • Corporate gift |
| • Special events proceeds | • Matching dollars |

- **Develop campaign strategies**

- | | |
|---|---|
| <input type="checkbox"/> Campaign timeline | <input type="checkbox"/> Follow-up methods |
| <input type="checkbox"/> Campaign goal | <input type="checkbox"/> Campaign theme/focus |
| <input type="checkbox"/> Solicitation methods | |



Most companies can run their campaign in a 2-week timeline, depending on the size of the company and the number of campaign events. Even if collecting campaign results take longer, the events can still wrap up in 2 weeks.

Ways to Grow Your Campaign

To increase employee participation:

- Provide testimonials by company employees
- Provide an incentive for employees to reach a certain level of participation
- Focus on Young Philanthropist Society, Women United, and the J. Mason Davis Leadership Society

To increase the amount of funds raised:

- Host a leadership meeting and/or special solicitation
- Provide incentives for employees to increase their giving amount
- Create an internal recognition program
- Promote payroll deduction pledges over one-time donations

- **Ways to promote the campaign and other events**

- | | |
|--|---|
| <input type="checkbox"/> United Way posters | <input type="checkbox"/> Intranet |
| <input type="checkbox"/> United Way e-mail templates | <input type="checkbox"/> Company's social media |
| <input type="checkbox"/> Internal newsletters | |



Campaign events can include: kickoffs, volunteer days, agency tours, leadership meetings, employee meetings, and campaign celebrations

- **Needs for campaign meetings**

- | | |
|--|---|
| <input type="checkbox"/> Agency speaker (scheduled through LE) | <input type="checkbox"/> CEO/leadership endorsement |
| <input type="checkbox"/> Loaned Executive speaker | <input type="checkbox"/> Brochures |
| <input type="checkbox"/> Pledge cards (if not ePledge) | <input type="checkbox"/> UWCA video |

- **Additional Engagement Opportunities**

- | | |
|--|---|
| <input type="checkbox"/> Affinity group events | <input type="checkbox"/> Lunch and learn on UW focus area |
| <input type="checkbox"/> Visiting Allocations Team recruitment | <input type="checkbox"/> Item drive |
| <input type="checkbox"/> Volunteer opportunity | |

Sample Employee Meeting Agenda

Hold with entire company or by division/department

| | |
|-------------------------------|----------------------------------|
| Welcome | Coordinator |
| Endorsement | CEO or upper management |
| United Way Education | Loaned Executive |
| | Agency speaker (if applicable) |
| United Way Ask | Loaned Executive |
| United Way testimonies | Company employees |
| Thank You | Loaned Executive and Coordinator |

- * United Way video can be used after the Welcome or between United Way Education
- * Coordinator can share pledging and incentive detail in the meeting as well

- **Things to Include in a Leadership Meeting**

Invite company leadership and anyone who gives at the leadership level

- ☐ Hosted by CEO or high-level manager
- ☐ Held over breakfast/lunch
- ☐ Invite leadership speaker (scheduled by LE)
- ☐ Loaned Executive speaks
- ☐ United Way Major Gifts staff present to thank donors and share matching opportunities
- ☐ Ask company leadership to lead the campaign by contributing at the leadership level

- **Other Solicitation Ideas**

- ☐ Retiree letter campaign
- ☐ After-hours social for retirees
- ☐ UW packets year round for new hires
- ☐ Peer-to-peer asks within company

- **Designate a team member responsible for**

- ☐ Collecting pledge cards
- ☐ Submitting cash/checks to LE
- ☐ Compiling results
- ☐ Submitting payroll copies to HR
- ☐ Confirming the corporate pledge amount
- ☐ Announcing status of pledges throughout campaign
- ☐ Entering pledge data into a spreadsheet (*please use the example below if submitting results electronically*)

- **Process for Turning In Results**

1. Gather all pledge cards
2. Sort by pledge type: payroll deduction, cash/check, credit card, etc.
3. Total the dollar amount and number of pledges for each type
4. Finalize corporate dollars (including any company matches)
5. Submit results using these two options

- **Paper**

- ☐ Fill out provided envelopes
- ☐ Have LE pick up signed/sealed envelopes

- **Electronic**

- ☐ Compile results in a spreadsheet (see template below)
- ☐ Submit to *campaignresults@uwca.org*

| First Name | Last Name | Street | City | ST | ZIP | Email | Pledge Type | Donor Pledge | Company Match | DesgAmt1 | Agency Code | Recognition Name | Affinity Group? |
|------------|-----------|-------------|-------|----|-------|----------------|-------------|--------------|---------------|----------|-------------|-------------------------|-----------------|
| Mary | Smith | 123 Main St | Leeds | AL | 35111 | mary@gmail.com | Payroll | \$50 | \$50 | \$50 | A0024124 | Mr. and Mrs. John Smith | Y-Diamond Donor |

- **Thank everyone for participating**

- ☐ Hold a Campaign Celebration event
- ☐ Thank you e-mail
- ☐ Hand-written thank you notes
- ☐ Thank you message from CEO

- **Debrief for next year**

- ☐ Save file or binder to pass on to next year's coordinator
- ☐ Meet with team and United Way staff to discuss what worked, what to do differently

DIGITAL RESOURCES

If your company works remotely, has a hybrid work environment, or wants to incorporate virtual items into your campaign, then our Digital Resources are for you!

CAMPAIGN MATERIALS

www.uwca.org/campaign-center/campaign-materials

The Campaign Materials page of United Way's website includes digital versions of our campaign materials, including:

- Brochure
- Campaign Video
- Agency and Program Videos
- County Information Cards
- United Way logos and graphics
- Email templates
- Social media graphics
- Pledge Forms

Virtual Campaigns

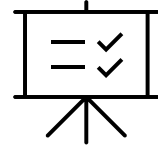
If your company is unable to run an in-person campaign, consider how you can incorporate these best practices digitally. Recruiting a team to help you coordinate and to set an overall goal for the campaign will continue to be crucial as you shift to a virtual campaign.

COMMUNICATION

- Have a communication plan in place for campaign updates and information
- Utilize United Way's email templates for your campaign.
- Feel free to create your own content to send out to employees about United Way's agencies and initiatives, 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 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 your virtual plans (emails, videos, Zoom links, etc.) with United Way staff or your Loaned Executive



EMPLOYEE MEETING/LEADERSHIP MEETING

- Host your employee meetings and leadership meetings virtually
- A leadership meeting is a specific employee meeting targeted towards donors who have the potential to give at the leadership level (\$1,000 or more)
- Utilize your company's virtual meeting capabilities (Zoom, Microsoft Teams, etc.)
- Include company leadership in your meeting. If leadership is not available, consider using a pre-recorded video of company leadership discussing the importance and impact of United Way
- Utilize United Way resources:
 - Your Loaned Executive and/or United Way staff will plan to attend each of your employee meetings
 - Show the United Way campaign video
 - Incorporate partner agencies in your virtual meeting through pictures/videos or live feeds coordinated by your LE
- Clearly communicate with employees how to make their pledge and how to engage with the campaign
- Consider providing "grab and go" breakfast/lunch or gift cards for employees to buy lunch on their own

Sample Virtual Employee Meeting Agenda

Welcome & Opening Remarks
 United Way Mission
 United Way Video (*share screen*)
 Partner Agency Speaker
 Instructions for Pledging

Company leadership
 Loaned Executive
 Coordinator
 introduced by employee w/ connection
 Coordinator

AGENCY SPEAKERS

- United Way has a collection of videos from some of our partner agencies on our website. Consider ways to share these with employees in a virtual meeting or through your communication plan
- Work with your LE to invite someone from a partner agency to speak in your virtual employee meeting

AGENCY TOURS

- Take a virtual tour of an agency through pictures or videos. Your Loaned Executive can help you coordinate this
- Have your Loaned Executive live stream from a partner agency during your virtual employee meeting



AGENCY FAIRS

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

CEO ENDORSEMENT



- Have company leadership speak in as many virtual meetings as possible about the importance and impact of United Way to him/her and to the company. If company leadership is unavailable, show a pre-recorded video of him/her endorsing United Way.
- Consider sharing multiple video messages from company leadership through your virtual campaign (during the kickoff, halfway through the campaign, at the campaign wrap-up event, etc.)

PLEDGE FORMS

- Consider making the pledge process entirely digital
 - If your company has 50+ employees, run an ePledge campaign and have all pledges completed through a secure, online pledging portal created and hosted by United Way. Contact United Way staff if interested.
- Utilize fillable PDF pledge forms, which can be completed and returned to United Way via e-mail

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 donors’ desks each day
- Set up thank you posters or banners in your lobby, employee entrance, or break room

Sample Virtual Campaign Timeline

- ☐ Announce Campaign Kickoff
 - Utilize campaign materials and theme to promote the start of the campaign in the company’s lobby or employee entrance
 - Email employees a video from company leadership about why United Way is important to them and what they look forward to in the company’s campaign
- ☐ Host virtual leadership meeting
- ☐ Host virtual employee meetings
- ☐ Email a video with an employee testimonial and video reminder from the CEO
- ☐ Host a virtual Lunch and Learn with partner agencies
- ☐ Feature a video listing the incentives your company offers—PTO, gift cards, etc.
- ☐ Wrap up with a thank you video from company leadership and a “grab and go” thank you treat



2023 HOT TOPICS/TRENDING/BUZZ

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, snesbitt@uwca.org or Destiny Cornelison, 205-458-2045, destiny.cornelison@uwca.org

AS OF MARCH 2023, NO TRENDING NEGATIVE NEWS

If a new **HOT TOPIC** needs to be addressed, we will make sure you receive a response statement.

Good News (as of March 2023) All can be found on www.bhamnow.com Follow them on social media for stories throughout the year.

Over \$210,000 raised for tornado relief in Selma, Alabama
100-Year-old Meals On Wheels Volunteer has a passion for serving
Chip Bivins elected 2023 UWCA Board Chairman
United Way launches fundraising campaign for victims of war in Ukraine
Katrina Watson named Senior Vice President for Community Impact



CENTENNIAL CELEBRATION

Since 1923, United Way of Central Alabama (UWCA) has faithfully served Central Alabama to meet the immediate and long-term needs of residents. By supporting partners and programs, responding to emerging needs, and innovating services to address complex issues, UWCA provides the community with resources needed to thrive. “We are firm believers that when we come together as a whole, the possibilities are endless,” said UWCA President & CEO Drew Langloh. “Our 100-year impact on the Central Alabama community proves this, and we look forward to continuing to pave the way for real, tangible change for the next 100 years.”

Local leaders founded UWCA, originally the Birmingham Community Chest, in 1923 with a fundraising goal of \$450,000 benefiting 31 agencies. Now, 100 years later, UWCA’s impact has grown to over 80 programs and initiatives across a six-county footprint with total revenue (campaign, government funding and other sources) in 2022 to over \$100 million.

Supporting celebrating events include an

- **Endowment Campaign** with a goal to grow the endowment to \$100 million in honor of the 100th anniversary.
- **Gifts to the Community** Volunteer supported projects in each county United Way serves in the form of a park or playground for all to enjoy
- **Centennial Birthday Party** Save the date for **June 24, 2023**, from 3:00pm -8:00pm at City Walk in Birmingham.
- **Sponsors as of March 2023** include Coca-Cola United, Blue Cross and Blue Shield of Alabama, Regions

A Strategic Vision Plan 2022-2030

As we approach our 100th Anniversary, we have also launched a plan that will take us to the next level in addressing community needs. Over the last decade, United Way of Central Alabama has experienced significant growth and is one of the very few United Ways in the nation that provides direct services to its community. This is consistent with our comprehensive approach to helping people in need.

Through a variety of grants and partnerships, we now operate programs ranging from the Area Agency on Aging and Priority Veteran to Success By Six, our statewide 2-1-1 Call Center and several housing and personal finance programs. Now more than ever, UWCA is better equipped to execute our mission to increase the organized capacity of people to care for one another and improve their community.

Rather, with the scope of this plan being 2022- 2030, it is our intention to outline a broad and inspiring vision for the future that will allow us to deliver more fully on our credo to LIVE UNITED, by aligning our work under specific goals for community improvement and better tailoring our services to match the needs of the many diverse communities represented across our footprint.

As UWCA pursues our 2030 Community Improvement Goals by moving more deliberately into communities facing greatest disparity, these principles will guide our community engagement strategy:

Inclusive Solicit input from disadvantaged communities and involve them in the development of strategies to affect change in their neighborhoods.

Action-Oriented Ensure objectives target people and communities that are impacted by disparities and act with urgency to accomplish our goals and strategic imperatives.

Balanced In serving a six-county area, we realize the importance of balancing regional efforts with local, targeted action and individual engagement. We will emphasize alignment of our regional priorities with our intentional efforts within local communities.

TOP MEDIA Interests from 2022

COVID Resources

Disaster Response

211 Calls For Help Income

Income Tax Prep

Meals On Wheels

Financial Wellness

Senior Issues

Housing Issues

Issues Veterans' Issues

RECURRING QUESTIONS

Does United Way endorse political candidates?

No. 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 an unbiased 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 unbiased 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 19 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 \$125 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 are 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 organizational 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 with 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.

2/23

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