

UNITED WAY OF SOUTHWESTERN INDIANA

2021 EMPLOYEE CAMPAIGN CHAMPION GUIDE



UNITY BUILDS COMMUNITY.

UNITY BEGINS WITH YOU.

**United
Way**



**United Way
of Southwestern Indiana**

Thanks from our President & CEO

Dear Employee Campaign Champion,

Thank you for accepting your pivotal role in this year's United Way campaign! You are essential to our success, especially as United Way undergoes changes.

Employee Campaign Champions are ambassadors, storytellers, and the go-to person for information about United Way, our new "pathways," and community impact. The United Way campaign is all about bringing people together to address our community's most critical issues.

This guide provides United Way information, insights, and quick tips to help you and your campaign committee members conduct a successful campaign. Please look through the materials and visit United Way's website at www.unitedwayswi.org/2021-campaign-toolkit for more information and campaign assets. During the campaign, United Way staff will be here to help you in any way we can.

Thanks again for helping United Way empower individuals and families with resources to support their upward mobility. Unity will build a better community, and unity begins with YOU.

Sincerely,



Amy Canterbury
President and CEO
United Way of Southwestern Indiana

VISION

Communities where all individuals and families have the opportunity to achieve their full potential.



MISSION

Unite resources to understand and address priority community issues.



GOAL

Empowering individuals and families with resources to support upward mobility.



BUILDING PATHWAYS TO POTENTIAL

THE ISSUE

40% OF LOCAL HOUSEHOLDS CANNOT MEET A BASIC SURVIVAL BUDGET.

MORE THAN 11,200 OF OUR CHILDREN ARE LIVING IN POVERTY.

Most of these families have a working adult, but earn below the "living wage" standard, while facing increased costs of essential services and goods. *Source: IUW 2020 ALICE Report, 2020 Census Data & MIT's Living Wage Calculator

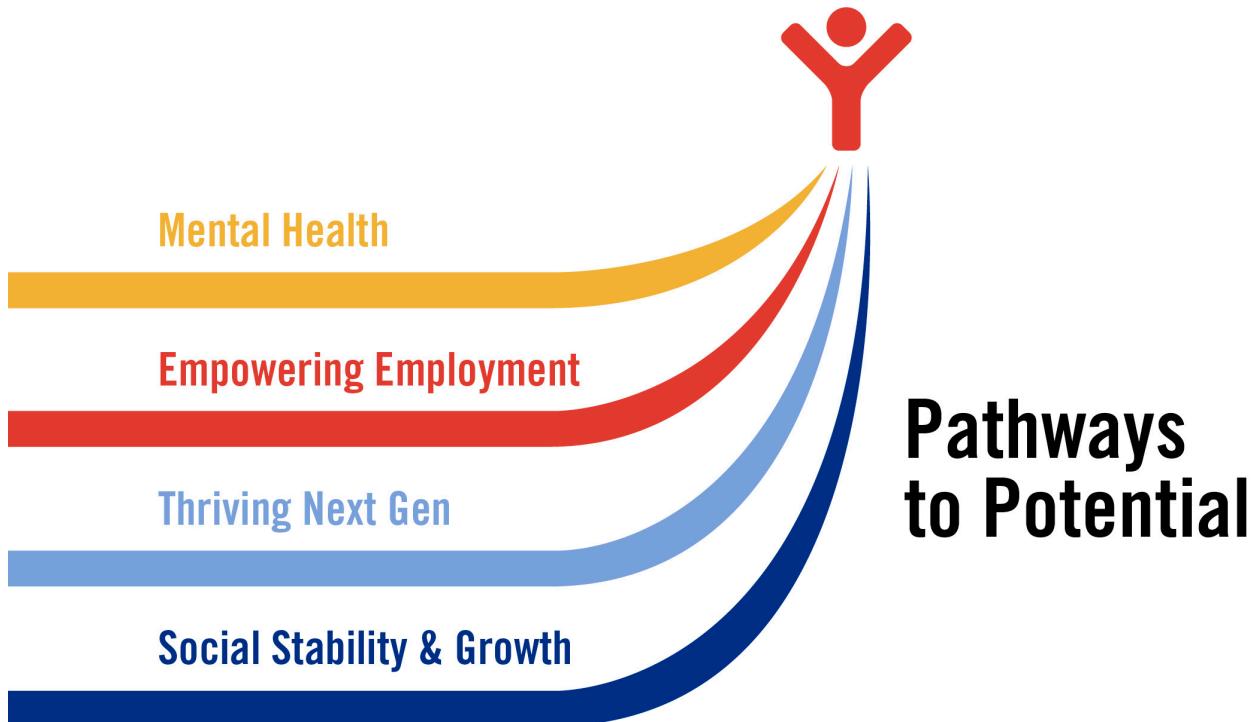
OUR STRATEGIES

Focus on the underlying elements that are shown to help individuals, families, and communities become more upwardly mobile.

Move to an **open**, competitive funding process that encourages collaboration and innovation, and includes stringent outcome measurement toward the goal.

UPWARD MOBILITY:
the capacity to rise to a better economic position

OUR NEW PATHWAYS TO POTENTIAL



Mental Health - Advocating for, and improving, mental health care access and awareness

Empowering Employment - Empowering individuals with the resources needed to secure and maintain employment

Thriving NextGen - Equipping children and youth with skills to thrive, both socially and academically

Social Stability & Growth - Strengthening relationships that serve as a safety net (family & friends) and alliances that expand opportunities for growth

WHY UNITED WAY?

United Way of Southwestern Indiana brings together nonprofits, volunteers, businesses, and dollars to activate change on a scale that no single organization can do alone. A gift to United Way is the most efficient and powerful way to help those in our community who are impoverished or struggling to make ends meet. Your donations are leveraged with others to help more people.

A holistic approach - United Way's new Pathways weave together the critical factors for improving upward mobility.

Breaking the cycle - Temporary measures focus on the short-term need (food, overnight shelter). To create lasting change, UWSWI is taking a long-term, comprehensive approach to break the generational cycle of poverty (living wage employment, social capital).

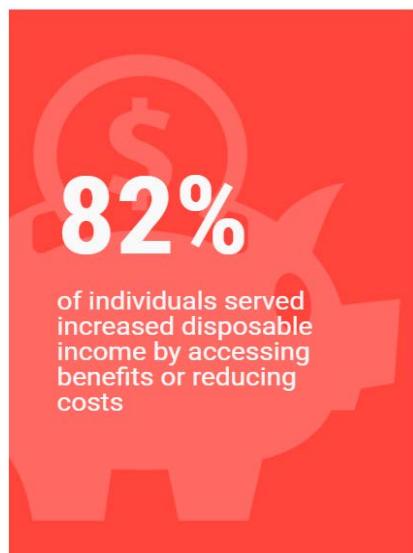
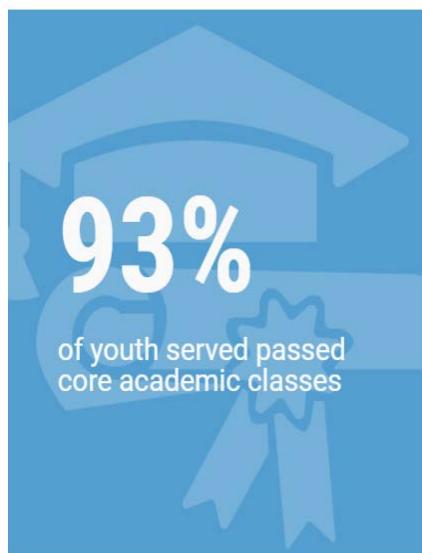
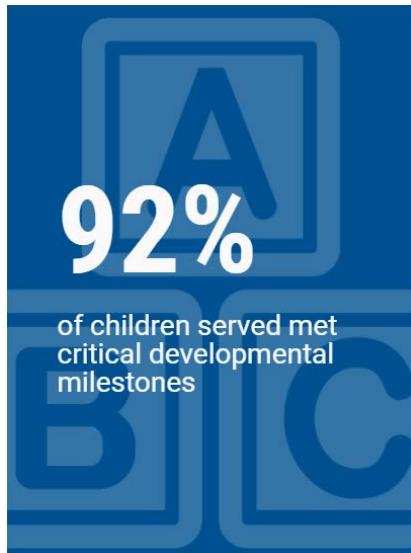
Consolidated donations make a bigger impact - Donations are consolidated to make a significant investment into a problem-solving initiative, allowing for larger impact than single donations to one organization.

Accountability - United Way funded partners must demonstrate how they will achieve the stated goal, how the outcomes will be measured, and fiscal stability. A cross-sector, diverse panel of subject-matter experts assess both applications and required progress reports. Rest assured, your donations are invested wisely to catalyze the most change.

We are more than a "funder" - United Way's work extends beyond investing in local nonprofit partners and their initiatives. In addition to providing K-Camp (Kindergarten Readiness Camp) and Volunteer Income Tax Assistance, United Way also leverages its technology, financial, and human resources to secure additional aid for our community. We provide administrative and fiscal sponsorship of the Emergency Food & Shelter Program, Resilient Evansville, the Southwest Indiana COAD (Community Organizations Active in Disaster), and the former COVID-19 Crisis Response Fund of Greater Evansville.

Local - Your United Way donations stay right here in our community to help our neighbors. They are not sent to any other United Way location unless we are directed by the donor to do so.

YOUR INVESTMENT BRINGS RESULTS



STEPS TO A GREAT CAMPAIGN

1. PREPARE

Plan your campaign in advance and recruit a strong team to lead your company's efforts.

- Set a campaign goal that your team and employees can rally around.
- Familiarize yourself with the Digital Campaign Toolkit, its contents, and this year's messaging.

2. INSPIRE

Help employees understand how their support can help us build a better community.

- Share campaign videos and message to connect employees with our impact.
- Schedule a virtual or in-person presentation with a United Way representative.
- Recruit company leadership to share why they believe United Way is important.
- Create fun special events or challenges to engage employees.



POST-CAMPAIGN STEPS

1. REPORT RESULTS

- Submit final campaign report envelope to Resource Development as soon as your campaign is over.
- Check pledge forms to ensure they are filled out correctly.
- If you use non-United Way forms, provide all pertinent donor details. (Template in the Toolkit)
- Review the report envelope instructions and complete your company's information.
- Survey employees to determine what was useful.

2. PLAN FOR NEXT YEAR

- Identify next year's ECC and provide survey results and resources.
- Send your ECC's name and contact information to UWSWI for inclusion on the ECC mailing list.
- Include UWSWI information in the new hire packet to give them the opportunity to support our community.
- Stay in touch via our website and social media to see how your effort is building a better community!

2021 CAMPAIGN DIGITAL TOOLKIT

1. Campaign General Information

United Way Campaign Presentation 2021
Community Impact Report (Online)
Workplace Client Template (for recording pledges and gifts)
Campaign General Poster
Campaign Talking Points

2. Campaign Videos

Leadership Message
Workplace Campaign Video
:30 United Way Ad

3. Campaign Forms (all editable PDFs)

Donor Pledge Form with fair share
Donor Pledge Form without fair share
Donor Option Form
Corporate Pledge Form

4. Campaign Digital/Social Media Images (2 formats/3 sizes)

5. Heritage Federal Credit Union Donor Incentive Information

Cash Giveaway Eligibility, Rules, and Guidelines
Incentive Ads (3 sizes)

6. 2021 Tax Benefit Information

Information and Sample Messaging
Digital Images for Web and Social Media

7. United Way Logos (Horizontal and Vertical in RGB & CMYK)

8. Sample Email Messages

9. Ways to Give

Workplace (payroll and checks)
UW Website - <https://www.unitedwayswi.org/give>
Text Unity21 to 41-444
Mail or email donor pledge forms to United Way



MAINTAIN YOUR PLEDGE (\$50 MINIMUM)
Same as last year's pledge = 1 Entry

INCREASE YOUR PLEDGE
Increase your pledge by \$50 or more over last year's pledge = 2 Entries
Increase your pledge by \$100 or more over last year's pledge = 3 Entries

NEW DONORS
Pledge \$50 or more = 1 Entry
Pledge \$100 or more = 2 Entries

For info and rules, visit unitedwayswi.org

*Net of applicable taxes.

ePledge: Take Your Campaign Online

ePledge is an online software that allows employees to pledge through a personalized website. You can include your company logo, leadership letters, and incentives.

Contact Helen Zimmerman to get started on ePledge.

FREQUENTLY ASKED QUESTIONS

Q. WHO DECIDES HOW DONATIONS ARE INVESTED?

A. United Way utilizes a cross-sector, diverse group of subject-matter experts to develop funding strategies and assess applications. The Cabinet also monitors funded partners for impact toward the goal, stringent measurement of stated outcomes, and fiscal stability. Their charge is to invest donations into the most effective, innovative, and efficient initiatives creating long-term change in improving upward mobility.

Q. CAN EMPLOYEES DONATE ONLINE?

A. Yes! Visit www.unitedwayswi.org and click Give Now or text the phrase Unity21 to 41-444. Both methods will take you to a secure donation page where you can pay by credit card, debit card, PayPal or Apple Pay. Donors can set up a payment schedule.

Q. DO YOU HAVE GIVING SOCIETIES?

A. We do! Our Leadership Giving Societies are crucial to the important, lasting work we do in the community. Each society level enjoys a unique set of benefits that are based on annual giving amounts.

- \$ 500 - Young Leaders United (Ages 40 and under)
- \$ 1,000 - Keel Club
- \$10,000 - Alexis de Tocqueville Society

To learn more, contact Helen Zimmerman, Resource Development Director.

Q. IS MY CONTRIBUTION TAX-DEDUCTIBLE?

A. Possibly. The CARES Act tax benefits have been extended and expanded for 2021. Non-itemizers are allowed the standard deduction plus up to \$300 in charitable contributions for individual filers and up to \$600 for joint filers. Itemizers can now claim up to 100% of their adjusted gross income, where it had been previously capped at 60%. Please consult your tax advisor for more information. Contributions must be made in 2021.

Q. IS THERE AN INCENTIVE AGAIN THIS YEAR?

A. Yes! Thanks to the generosity of Heritage Federal Credit Union, donors who meet the eligibility requirements will have the opportunity to participate in the \$10,000 Donor Incentive Cash Giveaway. Due to the economic impact of COVID-19, United Way has extended the expanded eligibility to include those individuals who choose to maintain their 2020 giving level, provided it was at least \$50. For eligibility information, rules and guidelines, visit unitedwayswi.org/give. *NOTE: Award will be net of applicable state and federal taxes.*

Q. CAN DONORS STILL DESIGNATE THEIR GIFT?

A. Yes. Donors may still designate their gift to a Pathway, a United Way program, another United Way, or a current Funded Partner, provided it is at least \$25. We encourage designations to one of the new Pathways, as it will be both a powerful and efficient investment in the area of your interest.

THANK YOU!



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