



UNITED IS THE WAY VOLUNTEER GUIDE

United Way of Story County is a leader in driving change for Bright Futures, Financial Empowerment, and Collective Well-Being. As a volunteer, you play a vital role in our mission through collective engagement and ensuring the success of our community campaign.

Volunteers have the unique ability to harness the generosity, talent, and energy of your workplace. **United is the Way** we create a community where all can thrive. Whether this is your first time as an employee campaign coordinator or if you've worked with us before, the tools here can assist you in executing a smooth and successful campaign.

Thank you for joining the United Way team! We're thrilled to work with you to create a connected community and engage people in Story County.

RESOURCES

Access pledge cards, designation forms, flyers, and more by visiting uwstory.org/campaign-toolkit.

CONTACT

(515) 268-5142
unitedway@uwstory.org.

SOCIAL



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CONNECTED COMMUNITY



OUR VISION

A connected and thriving Story County.

OUR MISSION

Unite people, ideas, and resources to transform lives in Story County.

UWSC 2030 STRATEGIC PLAN

We believe transformation happens when the entire community—neighbors, businesses, nonprofits, and volunteers—come together around shared goals. United Way of Story County is a leader, investor, and catalyst in creating this positive, long-lasting change.

Investing in **BRIGHT FUTURES** creates **FINANCIAL EMPOWERMENT** which leads to **COLLECTIVE WELL-BEING**.

STORY COUNTY'S NEEDS AND UNITED WAY'S SOLUTIONS

BRIGHT FUTURES

Low reading proficiency levels across Story County

- 24% of kindergartners are below fall literacy benchmark
- 32% of third graders don't meet proficiency

Why does this matter?

- Third grade reading proficiency is a critical milestone as it marks the shift from learning to read to reading to learn.
- Children who aren't reading at grade level by the end of third grade are more likely to fall behind academically, making early literacy a key predictor of high-school graduation and long-term opportunity.

Our response: Deliver 12,500 high-quality early childhood education opportunities.

FINANCIAL EMPOWERMENT

Financial insecurity is a daily reality for many households, limiting stability and opportunity

- 26% of households don't have \$400 on hand for emergencies
- 12% of households are underbanked

Why does this matter?

- Access to supportive programs helps individuals and families manage limited resources, avoid financial pitfalls, and build long-term stability.
- When families understand how to budget, save, and plan, they're better equipped to handle emergencies, reduce stress, and create long-term stability that can break cycles of poverty and open doors to opportunity.

Our response: Invest in tools to build long-term financial stability for 1,000 households annually.

COLLECTIVE WELL-BEING

Food insecurity, declining mental health, and fewer volunteers limit well-being, connection, and community resilience.

- 10% of people are food insecure
- 31% of youth reported two or more weeks in a row of poor mental health
- 66% decrease in annual volunteers since 2020

Why does this matter?

- Without essentials like food, connection, and basic resources, the risks of poor health, isolation, and instability grow - impacting not only individuals, but the entire community.
- Food security, social connection, and access to basic needs like housing, healthcare, and transportation are the foundation of well-being. When people have reliable support and resources, they're better equipped to thrive in every area of life.

OUR RESPONSE: MEET BASIC NEEDS WHILE FOSTERING 15,000 MEANINGFUL CONNECTIONS.

THE BASICS

If you've never run a campaign before or if you're a seasoned veteran, there are terms that will be used throughout this document and in your conversations with us where a shared definition can decrease confusion. Let us know if there are any we missed!

CAMPAIGN TOOLKIT

This document and any information found at www.uwstory.org are referred to as the campaign toolkit. It's anything we've provided to help you in your campaign!

VOLUNTEER

Volunteers are people who give their time to an organization without being paid. In this document, anyone from a company who works with United Way on their campaign is referred to as a volunteer.

CAMPAIGN

Campaign is the chosen period of time that a business works to raise funds for UWSC in a coordinated manner. This may involve special events and extra attention!

KICKOFF

This is the meeting that sets everything up - usually a UWSC staff will come present about our mission and the future we are working toward!

PLEDGE FORM VS. DESIGNATION FORM OR DONOR CHOICE FORM

Pledge Forms are online or paper documents where a person indicates the amount they will be donating toward UWSC. A designation form is attached to this and includes additional information from the donor about what or where they'd like their money to go. In the online form, a donor choice form is an additional field. No need to attach anything additional!

DESIGNATED VS. UNDESIGNATED GIVING

Undesignated dollars, or a gift TO United Way, is the most effective donation. These are dollars directed to our community fund, one of our three community impact areas, or one of our special initiatives. These gifts combine with thousands of donors and are invested directly into programs and initiatives that benefit the entire community. Our community's problems are interrelated, and only donations of this kind fund an array of programs collaborating to address complex issues in a way no single agency, donor, or sector can do alone.

Designated dollars, or a gift THROUGH United Way, are donations of \$50 or more directed to any eligible 501(c)3 organizations. UWSC processes these as a courtesy to organizations who host corporate campaigns with us.

JUMPSTART YOUR CAMPAIGN

Planning makes perfect in the case of a United Way drive. There are a few factors that are most often at play in a successful drive, including:

- an organized project manager
- vocal support and endorsement from organizational leaders
- an easy enrollment process
- a network of people helping behind the scenes

We are available and ready to assist with strategy and planning, so please reach out if you need help brainstorming ideas to make your campaign the best it can be for your organization. We're all working together toward the same goal, but this could not happen without you!

This packet is not exhaustive, but should help jump start your creative thinking process surrounding your campaign. Not every good idea is included! You can find additional materials on our website, www.uwstory.org/campaign-toolkit. **United is the Way** Story County can make a better community for all who live here.

DATES TO KNOW

Day of Caring - Friday, September 11, 2026

Campaign Celebration - Friday, December 12, 2026

Women United Breakfast - Late March

Food Drive - Late April/Early May, before
residence hall move out

RUNNING A CAMPAIGN

You are the centerpiece of your organization's United Way campaign! Use this tool and the check-in and timelines document to ensure you're prepared for your campaign. You and your committee have the power to create transformational change in Story County communities when you coordinate a campaign that is engaging, meaningful, and fun!

PREPARE

- Learn the basics about United Way and UWSC's Community Impact plan.
- Participate in United Way's visit with your CEO or campaign leader to be informed of goals for the campaign.
- Assemble your committee! You'll want people from different departments and backgrounds.
- Analyze the previous year's campaign goals and results.
- Set goals for total donations, participation levels, dollars raised, create and adjust timelines, and develop strategies and measures for success.
- Meet with your CEO to discuss goals and strategies, secure endorsement, get approval for incentives, and confirm a corporate match or company gifts.
- Assign specific tasks to the team and schedule planning and progress meetings.
- Connect with United Way if you need support!
- Attend Campaign Volunteer training.

PLAN

- Determine length of campaign and additional ideas for engagement.
- How can leadership help you engage donors?
- Review campaign materials in UWSC's campaign toolkit!
- Set a date for your campaign kickoff with leadership, invite United Way to speak!
- Plan and schedule engaging events and opportunities to inspire colleagues to give back, including virtual opportunities if appropriate.
- Source items needed for scheduled events!
- Contact United Way if there is anything we can do to support you, including reviewing the planning process and inviting us to events!

CONDUCT

- Promote your kick-off event and other engagement opportunities via email, meeting agendas, etc.
- Hold your kick-off events! Invite UWSC to share our goals, and have a team member or leader talk about United Way's impact.
- Ask coworkers to participate by donating, volunteering, and/or advocating.
- Provide campaign materials for every person in the company.
- Talk through donation processes.
- Participate in Day of Caring and other UWSC events.
- Ensure all employees can access the campaign and understand its purpose.
- Update employees on progress toward shared goals.
- Keep United Way involved and informed!

CONCLUDE

- Consider final push and close-out strategies to encourage last-minute donations.
- Show donors the impact of their contribution and encourage them to stay connected with United Way's efforts throughout the year.
- Consider hosting a thank-you event for all employees to attend.
- Send a letter or email from you and CEO/leadership team thanking every employee for their contribution.
- Thank your campaign team.
- Document results, feedback, and other lessons learned to ensure next year's campaign is more effective! Be sure to involve your committee and United Way staff.
- Arrange for United Way to collect campaign materials and pledges. This should happen soon after your campaign has concluded.
- Invite United Way to speak to employees to say thank you!

WAYS TO GIVE

There are two versions of pledge forms available, a paper, printed pledge form, and a company-specific page on our website. The paper forms are available for print on our website in the campaign toolkit. Your personalized link will be included with your campaign communications from our team. They are both equally used, valuable, and carry the same information, so whichever you use is up to you! Designation forms are separate, can also be found on our website, and need to be attached with the pledge form, but do not need to be included for online forms, since that information is included in the site.

If using the printed versions below, please download these from our website,
www.uwstory.org/campaign-toolkit

2024 UNITED WAY PLEDGE FORM
 315 Clark Ave
 Ames, IA 50010
 (515) 268-5142
www.uwstory.org

1. MY INFORMATION

First Name _____ Last Name _____
 Preferred Mailing Address _____
 City _____ State _____ ZIP _____
 Preferred Email: _____ (My mailing my email is going to be digital communications to better connect with UWSC's work)
 Preferred Phone _____ Employer Name _____ (I Retired (I Plan to retire in 2023)
 Spouse Name (if applicable) _____ Spouse Employer Name _____ (I Retired

2. MY 2024 GIFT \$ _____ **CHOOSE TOTAL DOLLAR GIFT AMOUNT**
☐ CASH/CHECK ENCLOSED \$ _____ (Check payable to United Way of Story County)
☐ BILL ME: ☐ QUARTERLY ☐ ONCE ON _____ / _____ (mm/yy)
 If Applicable: ☐ PAYROLL DEDUCTION \$ _____ x _____ = \$ _____ (no tax)
☐ EMPLOYER MATCH = \$ _____ (no tax)
 Credit Card donations can be made at www.uwstory.org. For gifts of stock/securities please call UWSC office at 515-268-5142.

3. MY CAMPAIGN RECOGNITION
☐ Tocqueville Society (\$10,000 or more in one year) ☐ I prefer to remain anonymous
☐ Leadership Challenge (\$2,500-\$999 in one year)
☐ Leadership (\$1,000-\$249 in one year)
☐ Women United - Entire gift * Portion of gift: \$ _____ (\$1,000 or more in one year for membership status, provides financial education opportunities for women)
☐ Young Leaders Society (\$250 or more in one year for donors age 40 and younger)

4. MY LASTING IMPACT
☐ I've also enclosed a gift to the Endowment \$ _____ (Check payable to Story County Community Foundation, name: UWSC Endowment)
☐ Endowment Builder (\$1,000 or more to the Endowment fund) ☐ I've included UWSC in my estate

THANK YOU An inspiring leader United Way of Story County is a qualified 501(c)(3) organization, and does not provide goods or services in exchange for partial consideration for the contributions made to it. Please understand that the attached constitutes your specific gift designation. The general information contained herein does not replace you to keep a copy of this pledge form along with your paper money, 100 or other important documents to verify any payment amount paid to United Way of Story County.

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DONOR CHOICE FORM

United Way of Story County (UWSC) encourages you to influence the condition of all with one gift. However, if you prefer to make choices, please complete this form and return it with your pledge card.

United Way of Story County
 315 Clark Avenue
 Ames, IA 50010
 (515) 268-5142
unitedway@uwstory.org
www.uwstory.org

Name _____
 Employer _____
 Address _____
 Phone or email _____

Investing in United Way of Story County Community Impact
 UWSC works with partners to identify needs and solve problems in the areas of:

☐ **Health**
 • Affordable essential services
 • Accessible essential services

☐ **Education**
 • Prevention strategies
 • Outreach and advocacy services
 • Building blocks for academic success

☐ **Financial Stability**
 • Basic needs
 • Emergency needs
 • Movement toward self-sufficiency

A minimum of \$50 per designee is required to process your designation beyond UWSC. Designations not meeting the minimum will be distributed as an undesignated gift and will benefit over 30,000 people throughout Story County.

☐ Please check here if you want to remain anonymous to your designated agency.

Select the donor option you prefer:
☐ Specific UWSC partner agency(ies) _____ \$ _____
☐ Another United Way _____ \$ _____
☐ Exclude the following UWSC partner agency(ies) from your gift _____
☐ Non-partner agency(ies) (see guidelines below) \$ _____ (all information below must be completed)
 Agency Name _____ Phone _____
 Mailing Address _____ City _____ State _____ Zip _____
 Email/Website _____ EIN _____

Guidelines for designating to other agencies:
 • Donor must provide correct name, address and phone number for agency.
 • Agency must have federal tax exempt status, 501(c)(3), or be a United Way in the United States.
 • Agency must be certified in compliance with anti-terrorism requirements.
 • If a donor gives inaccurate or incomplete information, or if the designated agency does not qualify, these funds will be distributed as an undesignated gift and will benefit over 30,000 people throughout Story County.
 • Donor-designated pledges and contributions are assessed an administrative fee.

United Way of Story County has a venmo! You can find a printable flyer with our QR code and space for a personalized hashtag on our campaign toolkit website, www.uwstory.org/campaign-toolkit. Encourage your colleagues to use your hashtag as their memo when donating!

When creating your hashtag, please be sure to include the name of your company, what the donation is for (i.e. if you're aiming for a certain dollar amount for denim Fridays or are hosting a special event) and to not use emojis. Below are some examples of what your hashtag might look like:

- #FNBJeanDay
- #BusinessNameTrivia
- #HertzWiiBowling
- #BusinessName

SPECIAL EVENTS & LEGAL INFORMATION

WHAT SPECIAL EVENT IDEAS ARE THERE?

Special events are great ways to energize your campaign by gathering additional interest and/or donations for United Way's work. These dollars are not eligible to be designated due to the nature of having received a good or service in return for the donation. Intentionally building events that are efficient and effective can be a specialty. You can also incentivize people to choose payroll deduction or another method by making these free to attend for anyone who has done so! Below are some options to consider, there are more ideas and space to write your own on page 13!

- Jeans Day
- Bake Sale
- Parking Spot Auction
- Basket Auctions
- Pizza Party
- Spirit Day
- Penny Wars
- Tailgate Party
- Breakroom Breakfast
- Company Swag raffle
- Potluck luncheon
- Used Book or rummage Sale
- Rootbeer Float Sale
- Offsite volunteering
- Pet fashion show (can be done virtually with photos)
- Spare Change Bucket
- Doughnut Day
- Dunk Tank
- Candy gram
- "You Rock" Notes
- Wii Bowling Tournament
- Bags Tournament
- Trivia or Kahoot!
- Mario Kart Tournament
- Building snack kits or goodie bags to donate
- Giving tree or mission wall
- Cooking Competition
- Paper airplane contest
- Coffee Cart
- Photo Contest
- Guess who the pet belongs to
- Pie the executives
- LipSync/Karaoke
- Field Day
- Costume contest
- Lunch and Learn about UWSC OR a skill from a colleague
- Scavenger hunt
- Recess or field trip
- PTO lottery
- Local or UWSC swag drawing
- Tote bag and hat decorating
- Spelling Bee
- Meme creation contest

IMPORTANT LEGAL INFORMATION: GAMBLING & RAFFLES

United Way of Story County MUST approve any plans for games of chance or gambling. For any approved games of chance, all monies must be kept separate and clearly labeled. United Way will need to pay the appropriate gaming taxes under our gambling license.

IMPORTANT NOTE: it is illegal to gamble in Iowa using credit. Gaming must NOT be purchased through credit card or Venmo. Bingo games where numbers/squares are called are not allowed to operate on our gaming license. Raffle tickets must be kept, submitted, and retained with your funds when the money is received by United Way.

YEAR-ROUND ENGAGEMENT

There are a lot of things you and your company can do to increase engagement year-round! United Way's work doesn't just happen during campaign season. We host events throughout the year and can assist in coordinating volunteer opportunities that impact individuals in Story County.

UNITED WAY EVENTS

Day of Caring - Friday after Labor Day

- See all of the work United Way of Story County has done this year so far and spend some time volunteering with local Nonprofits. Businesses can sign up for volunteer projects on our website, starting in August.

Women United and Women United Breakfast

- Women United offers year-round programming for families that is focused on financial empowerment, including a mentorship program and a money management series. In March, a breakfast is held to recognize women in our community. Sponsorships for the breakfast become available in January.

Food Drive - Late April/Early May

- Our annual food drive is held through late April and early May, before residence hall move out and the close of classes to ensure our pantries are stocked after school dismisses for summer. Businesses can sign up as drop-off locations in March, and other opportunities are available for volunteering!



VOLUNTEER OPPORTUNITIES

Volunteering together is a great way to team build and create shared experiences that connect individuals back to the community and are a great way to achieve corporate social responsibility goals. These opportunities show how someone's time and dollars have an impact in the community and can better connect individuals with the work UWSC does. We offer on-site volunteer opportunities as well as kit building projects that are managed solely by UWSC, including supply purchase and delivery. UWSC can source and coordinate these opportunities for a small fee, and include the option for a short presentation from staff. After the conclusion of your experience, we will reach out to the partner organization for information about how your volunteering made an impact was and share that with you. On-site projects involve going to a local nonprofit and assisting them with tasks, including sorting supplies, cleaning, laying mulch, etc.

Kit builds can happen at your business or at United Way, and we will source supplies, guide you through your activity, and deliver them to the partner agency. As of this time, we offer snack bags and birthday bags to be delivered to food pantries, friendship bracelets to promote belonging, literacy kits (which include a book and activity) and teacher/educator thank you goodie bags for local childcare centers and schools.

You can also choose to work directly with a local nonprofit and coordinate your volunteer opportunity without United Way. Opportunities not managed by UWSC can be found at <https://liveinames.com/live/volunteer/> and on our website, www.uwstory.org/volunteer-us.

**IF YOU'RE INTERESTED IN
VOLUNTEERING TOGETHER, EMAIL
VOLUNTEER@UWSTORY.ORG!**

AFFINITY GROUPS

Affinity groups are a great way for community members to get further involved in the mission of United Way and to connect with like-minded individuals to work toward the common good.

40+

TOCQUEVILLE SOCIETY - \$10,000 ANUALLY

Named after a French philanthropist who was inspired by Americans giving generously of themselves to help others. They work to strengthen local United Way leadership through personal philanthropic action and networking with business leaders.

500+

LEADERSHIP DONORS - \$1,000 ANNUALLY

A significant portion of contributions to our campaign come from this group, and these individuals make a significant impact in Story County, and their influence and scope is growing.

60+

WOMEN UNITED - \$1,000 ANNUALLY

Donations from this group of Leadership Donors are dedicated to Financial Empowerment of women in the community. They invest in financial education and mentoring with a wide-ranging impact.

100+

YOUNG LEADERS SOCIETY - \$250 ANNUALLY

Philanthropic-minded individuals under 40 work together with United Way of Story County on volunteer opportunities, lunch and learns, networking, socializing, and more. These individuals are uniquely positioned to bring people together who are in need of social connection and to create life-long philanthropists.

KICKOFF MEETING IDEAS

Kickoff meetings can look different for everyone, depending on the size of your organization and your engagement levels. For many, a kickoff meeting involves a United Way staff giving a short presentation about the work we're doing and where we're going alongside another activity. Below is space to write down your own ideas! Some ways to increase engagement for these events are:

- Kit building or off-site volunteering with a UWSC partner agency
- Adverse Childhood Experiences (ACES) Brain game (contact UWSC if you're interested in this activity)
- Lunch and learn with United Way staff. This can be about one of our three impact areas, a specific partner agency, or more broad, or invite a member of your team to share a skill they have such as baking, yoga, painting, etc!
- Kahoot! or trivia
- Scavenger Hunt
- Happy Hour or block party
- Potluck or cooking competition
- Food drive, school supply drive, or other donation drive
- Costume contest, trick-or-treating, or themed dress down day
- Design and paint a bags board
- Board game party
- Bake sale or handmade goods sale

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GOAL SETTING

Use this tool to think through what goals you'd like to set for your campaign.

Some considerations:

- If your company could add ___ number of people with \$1 per pay period, how would that increase your total?
- If your company could add ___ number of people at your average gift, how would that increase your total?
- If your company could increase your average gift by 10%, how would that increase your total?

Make sure you set targets for the number of campaign activities, communications, and volunteer projects, too!

Measure	Prior Year Results	This Year Goals	Key Strategies
Employee Participation	# of Donors _____ # of Employees _____ % Participation _____ Average Gift _____	# of Donors _____ # of Employees _____ % Participation _____ Average Gift _____	
Employee Contribution Total			
Corporate Gift			
Special Event Total			
Overall Campaign Total			

TIMELINES AND CHECK-INS

		ASSIGNED TO	TARGET DATE	COMPLETED
6-8 Weeks Before Kickoff	Hold meeting with United Way staff and company leaders/campaign committee.			
	Recruit your volunteer team and set your kickoff date.			
	Contact HR to determine what information and lead time they require (for employees who choose payroll deduction).			
	Set goals for your drive! Include desired participation, number of donors, % increase, and any other metrics you want to measure.			
4-6 Weeks Before	Visit United Way's website to view resources available to support your campaign.			
	Schedule department or all-company meetings and speakers.			
	Determine special events your team would like to run! These should serve an identified purpose like building awareness or raising additional campaign dollars.			
2-3 Weeks Before	Ask your CEO to author a letter or email of support.			
	Announce your campaign plans company-wide.			
	Prepare campaign materials and distribution plan for kickoff. Check out the campaign toolkit page for flyers, email templates, sample communications, and more!			
4-5 Days Before	Customize email reminder for your kickoff event.			
	Hang posters in high-traffic areas of your office.			
	Post information or even videos on your company intranet, if possible!			

TIMELINES AND CHECK-INS, CONT.

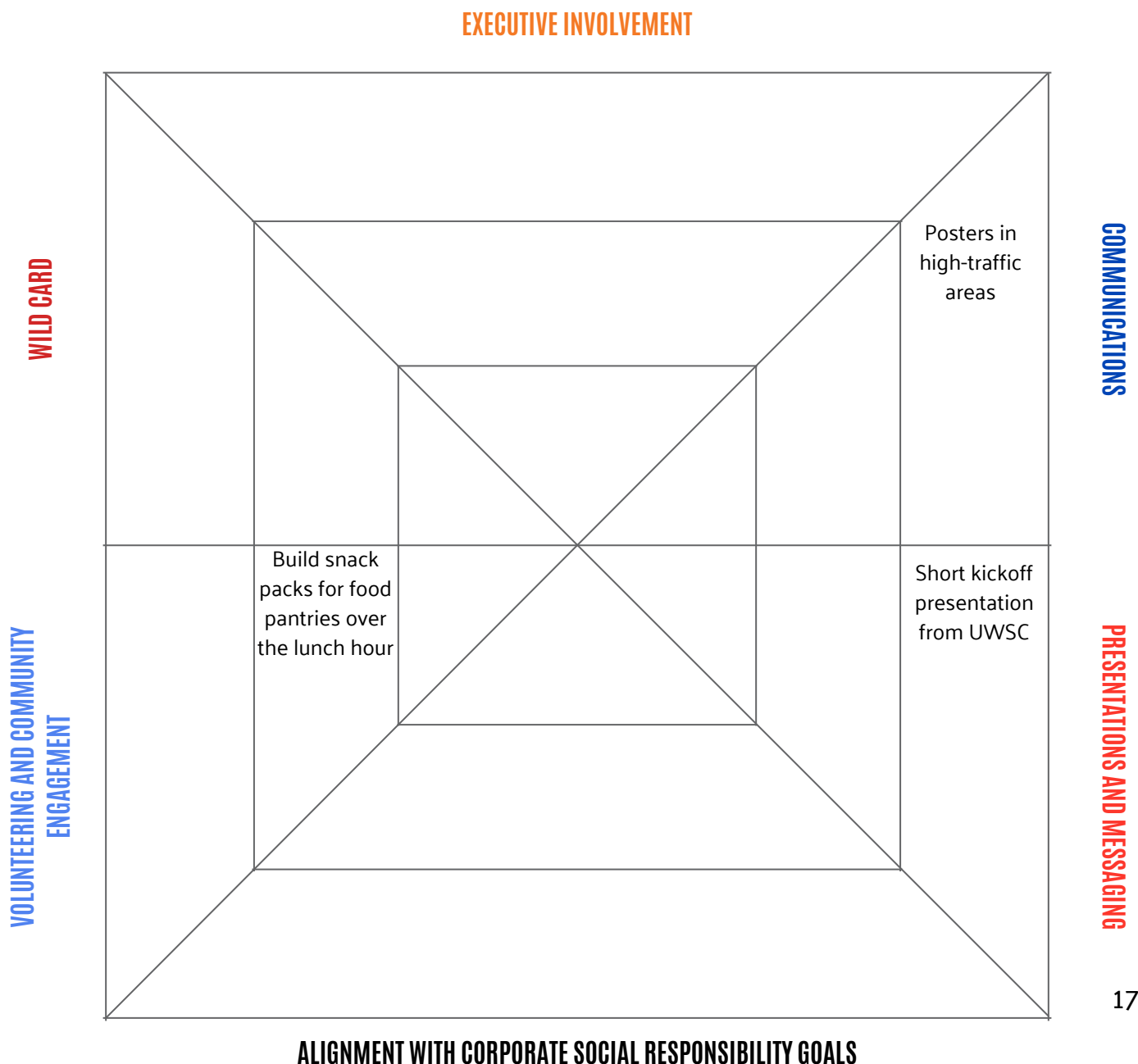
		ASSIGNED TO	TARGET DATE	COMPLETED
Day of Kickoff!	Send one final email reminder about your event!			
	Inform and ask: • Explain United Way's impact with speakers, videos, and personal testimonials. • Ask for your colleagues to join you with a gift this year. • Include detailed information on how to give and any incentives for giving.			
	Double check your supplies - make sure you have enough pledge cards or the link to the pledge site and that all members of the committee can talk about UWSC's impact and how to give!			
Throughout Campaign	Send success story emails or statistics in mid-campaign updates.			
	Use department meetings as reminders and additional touchpoints.			
	Take pictures of your activities to post internally and share with United Way!			
After Campaign	Provide HR with copies of all payroll deduction elections.			
	Communicate results in a final email with a message of thanks.			
	Finalize reporting template to be submitted with completed campaign.			
	Arrange for a delivery or pickup of your campaign with United Way staff.			
	Celebrate your successes! Think about what got your colleagues engaged and how you can carry that through and improve on it for next year while it's still fresh in your mind. Are there things you can do throughout the year to encourage your colleagues to get involved?			

WHAT'S ON YOUR RADAR?

When thinking about your ideal campaign engagement strategy, what activities can help you execute your plan in each area? For example:

- It might be helpful to schedule a presentation about Young Leaders Society if you have a significant portion of employees under 40.
- It may be ideal to have two kickoff events to ensure an excellent customer experience.
- You feel you can further engage employees by hosting some kind of collective volunteer event.

Plot your ideas within each category and the three levels of the square. The outermost layer is for ideas that would be easier to implement and may not produce significant engagement, while the innermost layer is for ideas that may be challenging to implement, but could have more significant impact.





UNITED IS THE WAY WE MOVE FORWARD TO A BETTER FUTURE FOR ALL

This toolkit isn't exhaustive, but should provide a solid basis for your campaign and some group activities to help you and your committee think through how it can be as impactful as possible. All tools provided are linked separately on our website, as well as flyers, our logos, email templates, sample communications, and short paragraphs to include in company-wide newsletters.

If you have any additional questions or would like to share success stories about United Way's impact, please feel free to contact us!

REACH OUT!

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