

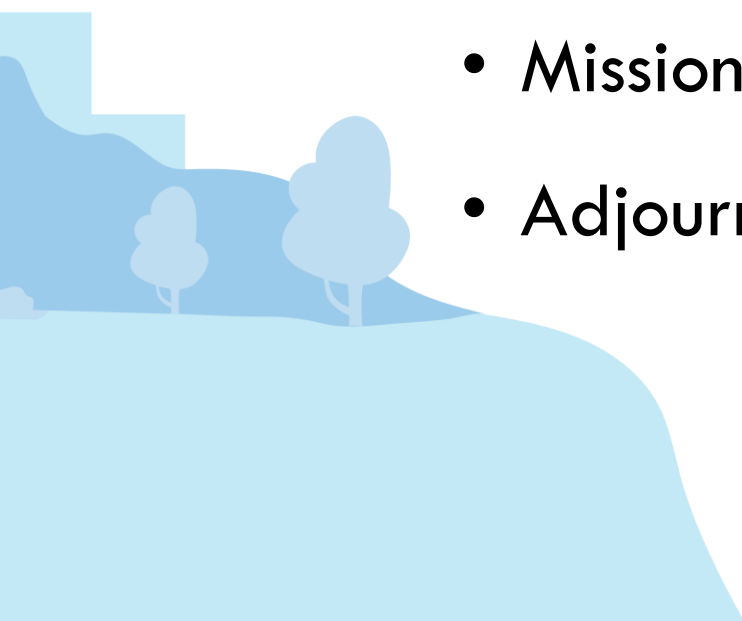
2023 Workplace Campaign Volunteer Caller Training



United Way
of Central Iowa

Meeting Agenda

- Welcome & Introductions
- 2023 Community Impact Report
- Campaign Structure & Purpose of CEO Calls
- CEO Calls – Process & Resources
- Mission Moment
- Adjourn



PARTNER WITH UNITED WAY



Partnering with United Way of Central Iowa shows your commitment to making central Iowa a place where everyone can thrive.

When employees work for a company with a strong purpose, they report they would be more

**loyal, motivated,
and productive.**

Portner Novelli Purpose Tracker: Employee Perspectives on Responsible Leadership During Crisis

71%

of workplace donors say they want to work for employers whose missions and values align with their own.

America's Charities Snapshot Series

68%

of employees say it is imperative or very important their employers provide them with paid time off to volunteer.

America's Charities Snapshot Series

88%

of company leaders believe effective employee engagement programs help attract and retain employees.

America's Charities Snapshot Series



IMPACT

Your company and employees will play an active role in creating lasting positive change throughout central Iowa.



MEANINGFUL ENGAGEMENT

United Way partners with you to meet your employee engagement, social responsibility, and philanthropic goals.



TRANSPARENCY

United Way is intentional about measuring and demonstrating progress in every area of our strategic imperative.



INDIVIDUAL VALUE

211 Iowa, Powered by Purpose, and other United Way programs provide valuable services to your employees and their families.

UNITED to THRIVE



MAKE LASTING COMMUNITY IMPACT

United Way brings together all sectors of our community to identify critical challenges, agree upon effective strategies, and work in a UNITED WAY to make real, measurable progress.

Together, we look at the big picture and are able to identify gaps and leverage points that no individual entity can see or address on their own.



ESSENTIAL NEEDS

Central Iowans need not only to meet their most basic needs of food and shelter, but access to quality, nutritious food, and a safe place to call home.

1,146

central Iowa students
started the school
year experiencing
homelessness.



Of those
students
experiencing
homelessness,
66% are students
of color.

Students Experiencing Homelessness

90% of these students attend schools in Polk County. Evictions in central Iowa increased by **35%** from 2021 to 2022 which equates to nearly **20 evictions a day**. Nearly **8,000** central Iowa households are behind in rent.

UNITED WAY ADDRESSES POVERTY & HOUSING

by funding multiple programs such as food pantries, homeless shelters for adults/families, and those providing legal representation involving evictions, landlord/tenant counseling, and case management, along with funding to support building and rehabilitating affordable housing units, all to assist families in breaking the cycle of poverty and unstable housing.

United Way's **OpportUNITY** initiative convenes expert work groups to identify and enact solutions in Housing, Food Insecurity, Re-entry, and other poverty-related issues.

EARLY CHILDHOOD SUCCESS

Our youngest central lowans need **not only** access to childcare, but access to safe, reliable, and affordable childcare to be healthy and ready to learn.

Polk County
has lost more than

1,000

licensed childcare
openings since
mid-2022.



Dwindling Childcare Options

Nearly **75%** of central Iowa children under the age of 6 have all parents and/or caregivers in the workforce. “Childcare deserts” exist in central Iowa—areas where there are too few licensed slots for the number of children who need care. There are only **3 licensed childcare slots for every 5 children** in Polk county. Childcare is the most expensive item in a typical household budget... more than housing, food, tuition, or transportation.

UNITED WAY SUPPORTS CHILDCARE INITIATIVES

by working to provide high-quality, affordable childcare to families living in low-income, and advocates for policies to increase the availability of childcare and compensation for childcare providers.

Since 2002, **Women United** has raised more than \$27 million to ensure young children are ready to succeed in school.

More than **60%**
of children under
age 6 are living in
poverty in some neigh-
borhoods in central
Iowa.

EDUCATION SUCCESS

Central Iowa students need not only to graduate from high school but should also have the opportunity to graduate with a plan for a successful future.

26%

of central Iowa high school graduates do not have a plan for the future.



No Plans for the Future

More than 1 in 4 of central Iowa high school graduates do not have a plan for continuing education and/or training. This number increases to **33%** for Black graduates, and **38%** for Latino graduates.

88% of jobs in Iowa require some training beyond high school.

UNITED WAY HELPS STUDENTS LOOK AHEAD

by supporting many initiatives and programs focused on helping students graduate, and understand their options after high school.

The recently-launched **United Wayfinders** initiative offers middle and high school students in-person introductions to many employment options in skilled labor and other areas.

42% of central Iowa graduates from low-income households do not have a plan for the future.



ECONOMIC OPPORTUNITY

Central Iowans need not only to be self-sufficient, but to be financially stable and have the opportunity to build wealth for their family and future generations.

20%

of central Iowa households could not survive a short-term loss of income.



Households on the Brink

In central Iowa, **1 in 5** households lack sufficient liquid assets, meaning they could not subsist, even at the poverty level, if they experience a job loss, medical emergency, or another financial crisis leading to a loss of stable income.

36% of Black and **19%** of Latino households have \$0 net worth. Their debts are greater than their assets, meaning they have no financial cushion to help them weather a financial crisis or invest in their future.

UNITED WAY FOCUSES ON FINANCIAL STABILITY

by supporting many initiatives across the community to help central Iowans gain the skills and training they need to increase income, improve liquidity, and build wealth. The **Volunteer Income Tax Assistance (VITA)** program provides free tax return preparation for thousands of households, resulting in millions of dollars in tax refunds.

For Black and Latino households in central Iowa, more than **56%** could not survive a short-term loss of income.

HEALTH & WELL-BEING

Central Iowans need not only access to medical care, but access to quality, culturally-appropriate care promoting physical and emotional well-being and improving resilience.

33%

of Iowa adults were not able to receive the mental health treatment they needed.



Those living in poverty are **3x** more likely to report poor mental health.

Last in the Nation

Iowa is ranked last in the nation for the percent of adults unable to receive the mental health treatment they need. **44%** of Iowa adults with mental illness receive no treatment at all.

Our state falls short of the number of mental healthcare providers needed to meet this challenge. Children relying on Medicaid wait an average of **12 weeks** for an appointment with a new mental healthcare provider.

UNITED WAY PROMOTES HEALTH & WELL-BEING

by providing funding to multiple partners offering mental healthcare services to individuals & families of low-income.

United Way has been a leader in **The Well Kids Coalition** and others dedicated to children's physical and mental well-being with a focus on creating access to resources that support healthy lifestyles where people live, work, and play.



BIG-PICTURE FOCUS

COMMUNITY-LEVEL IMPACT

GIVE

United Way combines your contribution with donations from others and invests in proven programs making a real, measurable impact.

UnitedWayDM.org/give

ADVOCATE

United Way collaborates with partners and passionate individuals to advocate for every lowan through policy and regulation changes at the state and local level.

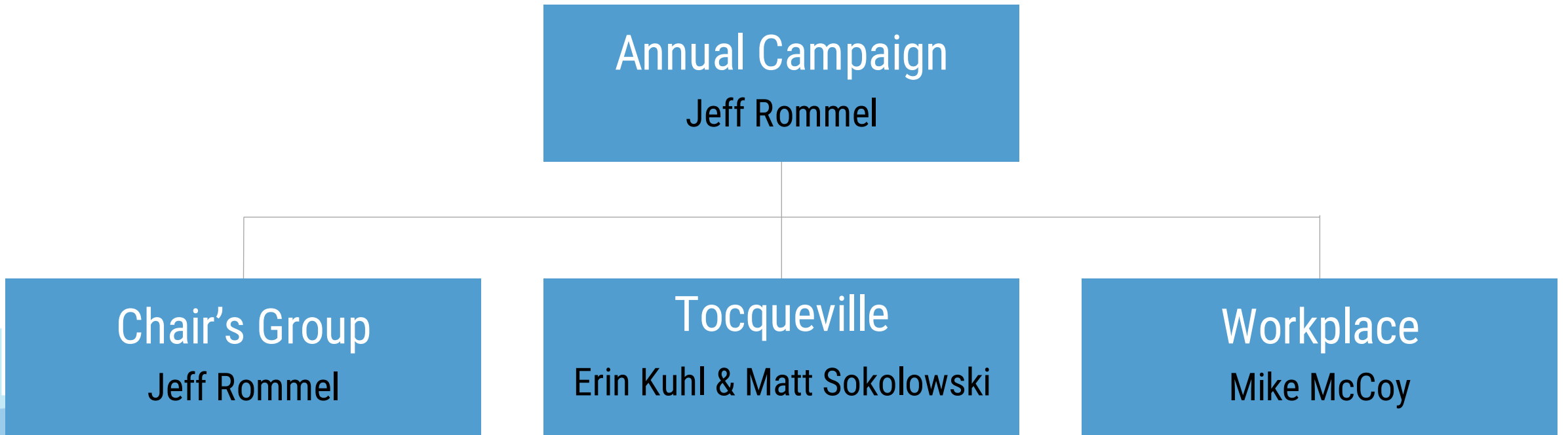
UnitedWayDM.org/advocate

VOLUNTEER

United Way coordinates volunteer activities for thousands of central lowans to support initiatives across our community. Find volunteer opportunities with a variety of community partners at

UnitedWayDM.org/volunteer

Campaign Structure



2023 Chair's Group Companies

American Equity

Athene

Bankers Trust Company

Corteva Agriscience

Dotdash Meredith

EMC Insurance

F&G

Farm Bureau Financial Services

Farmer's Mutual Hail

Federal Home Loan Bank

Global Atlantic Financial Group

Hearst

Holmes Murphy & Associates

Homesteaders Life

ITA Group

John Deere

Knapp Properties

Krause Group

MercyOne Des Moines

MidAmerican Energy

Nationwide

Prairie Meadows

Principal

Ruan Transportation

Sammons Financial Group

Wells Fargo

Willis Automotive

2023 Workplace Campaign

Loaned Executive
Recruitment

Education
Leadership Initiative

LINC

United LEAGUE

Women United

Business Services

Finance & Insurance

Legal

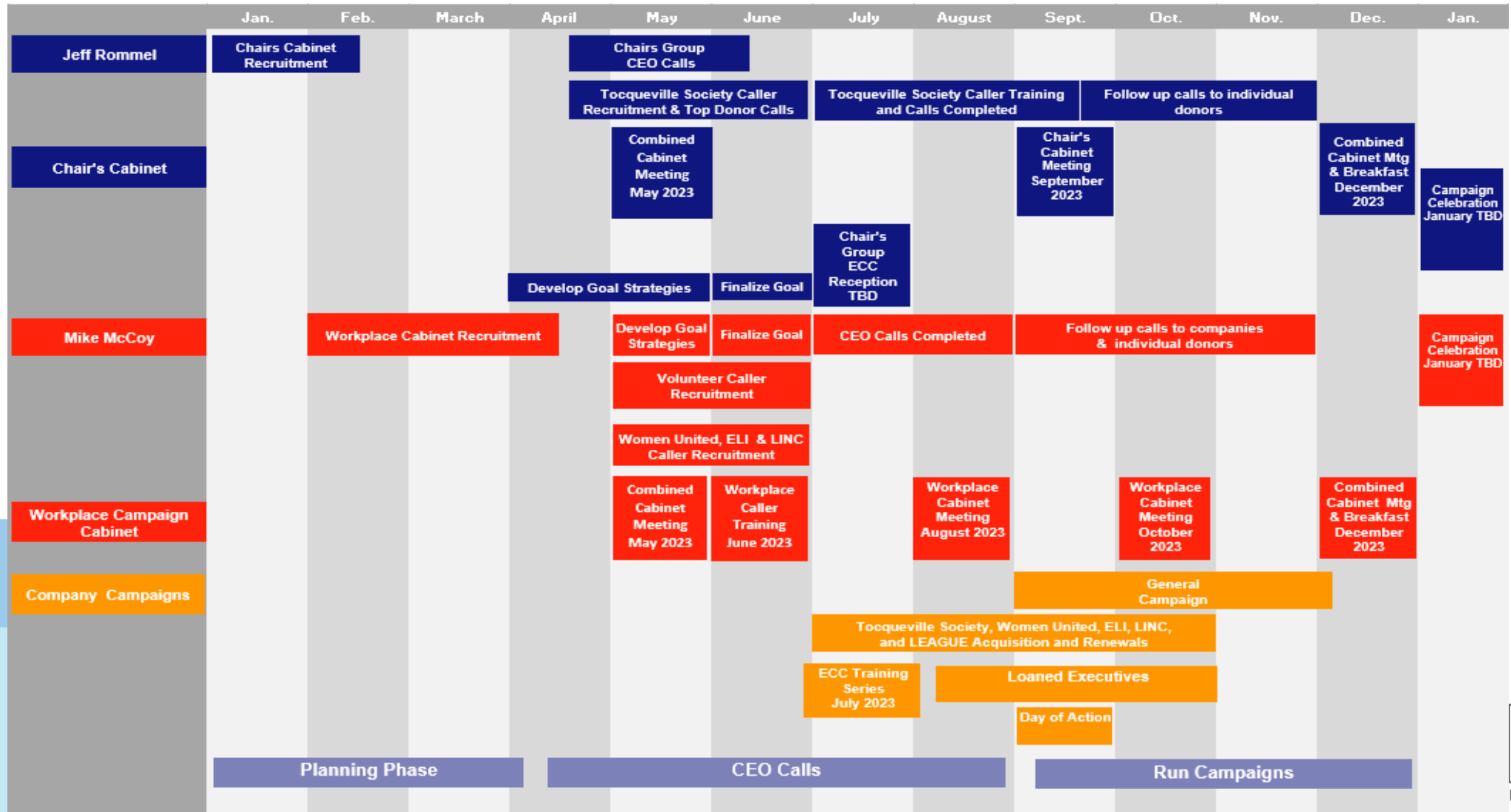
Manufacturing &
Commercial Services

Medical

Public Services

Retail &
Communications

Campaign Timeline



Purpose of CEO Meetings

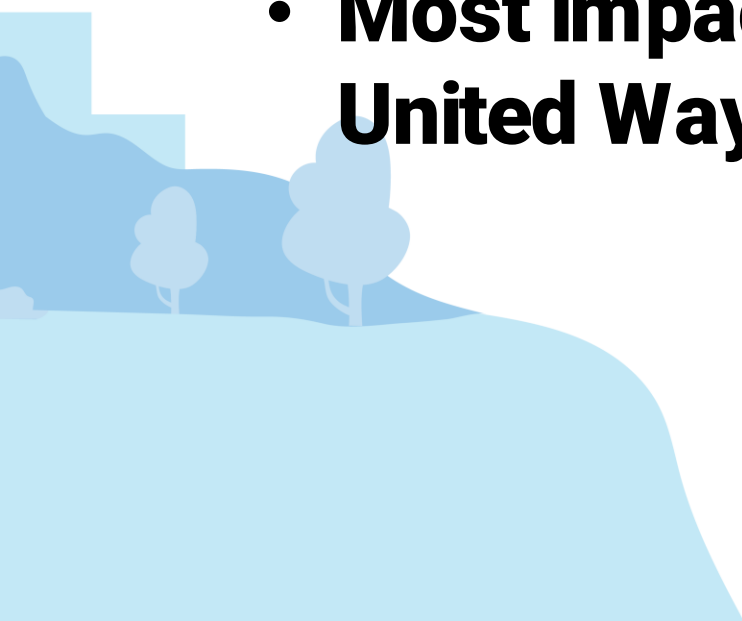
- **Important to have the company leader on board.**
- **Opportunity for us to thank the CEO for all that they and their employees have done for UWCI, engage them with UWCI year-round and inspire them to grow their campaign.**
- **Opportunity to ask how we can assist with any goals they have for their company or the community.**
- **Our data shows companies for which we are able to secure CEO meetings historically have stronger campaigns.**
- **Opportunity to identify any potential concerns/red flags with this year's campaign.**

Importance of CEO Calls

- **107 CEO Calls completed in 2022**
 - **Represented 85% of campaign dollars**
- **Of those companies who received a CEO call:**
 - **Average corporate gift of Workplace companies is nearly 3x higher than those with no CEO call**
 - **Average employee participation rate is 39% vs 31% for those with no CEO call**

Importance of Peer-to-Peer Conversation

- **Don't underestimate the importance of the peer-to-peer ask.**
- **CEOs more likely to respond and engage with you and your endorsement of UWCI.**
- **Most impactful when you can share why you support United Way of Central Iowa.**



Getting the Meeting

- **Schedule the meeting with the CEO/Executive Contact**
- **Include the employee who runs the campaign (Employee Campaign Chair)**
- **Call or email to schedule meeting**
- **30-minute face-to-face meeting**

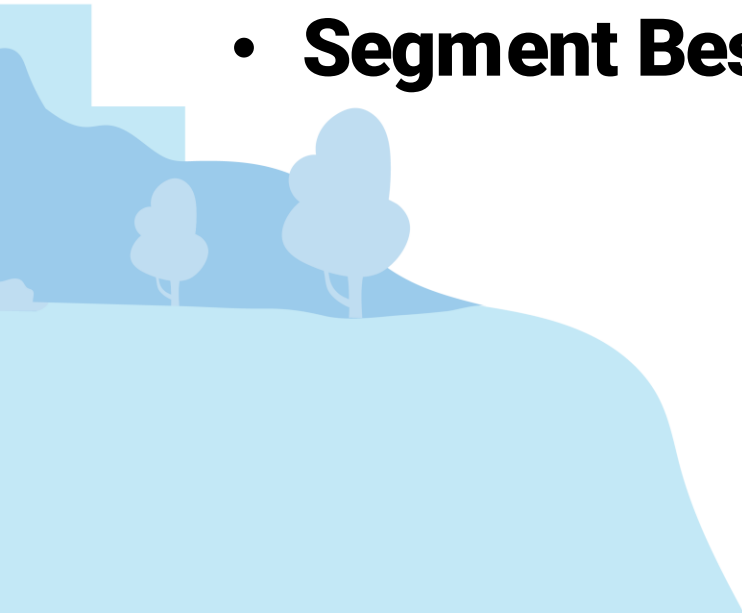


Getting the Meeting

- **Can start reaching out to schedule as soon as you have assignments**
- **Schedule the meetings between July 5 - August 25**
- **Send calendar invite to Company Contacts & United Way Staff**
 - **Attendees**
 - **Date & Time**
 - **Location (any safety/check in requirements) or Virtual Platform**
 - **If they have an internal system to use, the company can send out the invite.**

CEO Call Folder

- **Community Impact Report**
- **Cabinet Roster**
- **Company profile**
- **Segment Best Practices (as needed)**



Key Dates

July 5

Workplace CEO Calls Begin

July 11, 8:30am

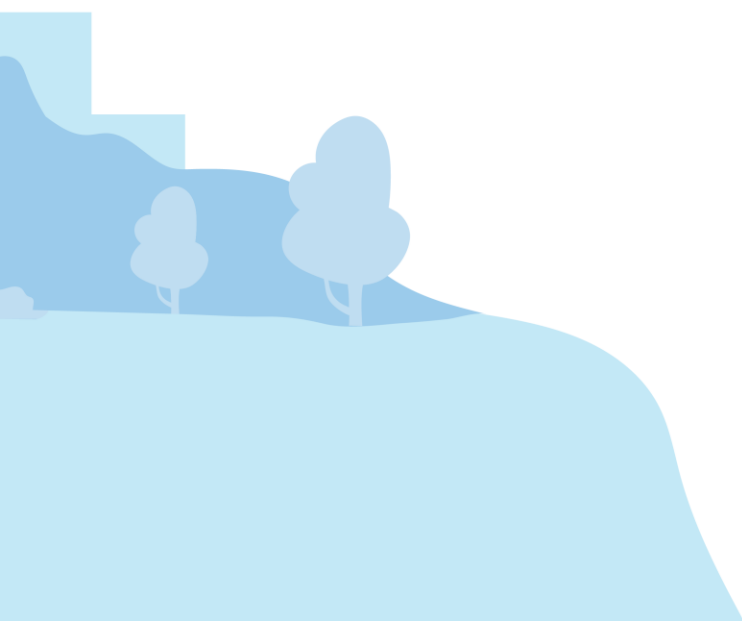
Campaign Connect ECC Training (in-person)

July 12, 9:00am

Campaign Connect ECC Training (virtual)

August 25

All CEO Calls Complete



Mission Moment



Thank you!

