2014-2015

Member Quick Start Guide

Tips and tools for United Way of the National Capital Area member nonprofit organizations

These benefits and responsibilities are in effect from July 2014 through June 2015.
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United Way of the National Capital Area (United Way NCA) works to create a thriving community where adults and children have access to excellent schools, good health, safe neighborhoods and jobs that pay a livable wage. Focusing on the critical areas of education, financial stability and health, United Way NCA serves eight regions: Alexandria, Arlington, District of Columbia, Fairfax/Falls Church, Loudoun County, Montgomery County, Prince George’s County and Prince William County.

**Education**

Every child is born ready to learn. To keep youth on track throughout their academic careers, United Way NCA connects them with caring adults who serve as tutors and mentors. We also invest in programs that have demonstrated proven success in conducting early interventions and offering academic and social support.

Our middle school success initiative focuses on helping students succeed at the middle school level, while also preparing them to transition into high school.

**Financial Stability**

Although the national capital area is one of the most prosperous regions in the United States, too many families in our area live in constant fear of losing their homes, being unable to pay medical bills, or other problems resulting from financial instability.

United Way NCA invests in workforce development and job training programs that prepare adults for careers that pay a family-sustaining wage and financial literacy programs that help people better manage their finances.

United Way NCA also partners with organizations to assist low- to-moderate-income families in accessing beneficial tax credits, including the Earned Income Tax Credit. Through this work, United Way NCA helps nearly 10,000 tax payers access the credit per year, which has resulted in more than $70 million in refunds returning to our region, since 2008.

**Health**

A community cannot thrive if its people are not healthy. Working with community partners who run programs, deliver services, and share our passion for improving lives, we focus on decreasing childhood obesity through Fun, Fly & Fit, our signature health program; providing access to affordable medical and dental care; connecting people in need to health and human services through our 2-1-1 call center, and helping people make healthy lifestyle choices.

We have a lot of work to do. We are up for the challenge.

Join our local movement to Live United.
About United Way NCA Membership

United Way NCA strives to offer member nonprofit organizations maximum value for participation in our network. This quick start guide is intended to help you understand all that United Way offers and asks of you.

**Funding Opportunities**
Workplace giving provides unrestricted funds—sustainable, long-term financial support that lets you plan ahead and provide ongoing services to your constituents. We raise millions of dollars each year for our members through our workplace campaigns, where donors are able to designate their payroll-deducted contributions directly to individual nonprofit organizations. We also provide grant opportunities for programs that support our core impact areas of education, financial stability and health.

Once your organization’s application for membership is accepted, our experienced team will then apply on your behalf for inclusion in corporate, municipal, Federal and state workplace campaigns.

**Outreach and Promotion**
We provide resources and opportunities for promotion and outreach to help spread the message about the good work of your organization, engage potential donors and recruit volunteers. Also, you are encouraged to utilize the United Way brand, which is one of the most recognized nonprofit brands in the world.

**Learning Opportunities**
We can help you build staff capacity. Throughout the year we will offer capacity building sessions on a range of topics designed to help nonprofit organizations become more effective, efficient and sustainable.

To get more detail about many of these topics and to find out about upcoming learning sessions, please visit the Members website at: UnitedWayNCA.org/events/members
Member Benefits

Membership Eligibility

United Way NCA member nonprofits must meet a strict set of eligibility criteria annually. This provides assurance to our donors, sponsors and supporters that United Way NCA’s member nonprofit organizations meet the highest standards of financial transparency and accountability.

All United Way NCA members are locally-based, 501c(3) nonprofit organizations, providing local services in the greater Washington, DC area. This includes the District of Columbia; Arlington, Fairfax, Loudoun and Prince William counties and Alexandria and Falls Church in Virginia; and Montgomery and Prince George’s counties in Maryland. Members must maintain an administrative overhead rate of 35 percent or less; document a total revenue of $50,000 or more; and have been in business for a minimum of three years to qualify for membership. To view all current membership requirements, please go to UnitedWayNCA.org/applying-for-membership.

Our campaign/membership year runs from July 1 through June 30, and the application process begins in November. This annual renewal requirement aligns with the application timeline of the Combined Federal Campaign.

United Way NCA does not charge dues or joining fees. An administrative fee is assessed to each donation processed by United Way NCA. The fee is deducted before funds are distributed to your organization. The fee is necessary to cover the costs associated with vetting members as well as coordinating, marketing and executing workplace campaign participation for our members.

Connecting people in need with local resources and assistance is a critical part of our mission.
Workplace Giving Campaigns

We facilitate workplace campaigns all around the region. Through these campaigns, Federal, municipal and corporate employees have the opportunity to designate their payroll deducted donations to nonprofit organizations of their choosing. Workplace fundraising can be an important piece of an organization’s overall fund development strategy.

Combined Federal Campaign

On your behalf, United Way NCA will apply to the Combined Federal Campaign (CFC) of the National Capital Area, Chesapeake Bay Area CFC and Potomac CFC. United Way NCA members are required to participate in these campaigns. The CFC provides access to hundreds of thousands of federal employees who donate tens of millions of dollars to United Way NCA and our members each year. The CFC assigns each participating nonprofit organization a distinct 5-digit CFC designation code.

Commonwealth of Virginia Campaign

If you meet certain eligibility requirements, United Way NCA will apply on your behalf to the Commonwealth of Virginia Campaign (CVC), an annual workplace giving campaign among more than 100,000 employees of the Commonwealth of Virginia. The CVC assigns each participating nonprofit organization a distinct 5 digit CVC designation code.


**Speakers Bureau**

Speaking to potential supporters is one of the best ways to advance your mission in our community. United Way NCA provides opportunities for our members to do just that. Our corporate community partners and the Federal workplaces are interested in hearing directly from our member nonprofit organizations. In addition to speaking engagements, nonprofit fairs also take place during the fall campaign season and provide you the opportunity to speak one-on-one with potential donors about the great work you do. To sign up for these opportunities, visit [UnitedWayNCA.org/speakers-bureau](http://UnitedWayNCA.org/speakers-bureau).

**Member Tours & Volunteer Placement**

You can invite donors into your organization to see how you change lives each day. We organize member tours and volunteer days for different groups, including employees at workplace campaign sites, leadership donors and other groups. United Way NCA can also assist you in finding individual volunteers to help with your day-to-day work. This program connects willing community members with volunteer opportunities at your organization. It is a great way to cultivate supporters and advocates for your mission.

Learn more about our volunteer placement efforts at [UnitedWayNCA.org/volunteer](http://UnitedWayNCA.org/volunteer).

**Community Events**

Members have the opportunity to participate in community events powered by United Way of the National Capital Area. This year, United Way NCA and local nonprofits raised more than $1.1M as part of Do More 24, the community-wide day of giving. For the past two years, the Shoebox Project brought the community together to donate and decorate hundreds of shoeboxes filled with basic need and emergency preparedness items.

Applying the age-old adage that the whole is greater than the sum of its parts, United Way NCA facilitates collaborative community impact events throughout the national capital area to address specific needs around our key impact areas of education, financial stability and health. By pooling staff, resources and expertise from our members and other key community partners, we provide direct services to area residents.
Learning Opportunities

Learning Series
We are committed to helping you to strengthen your organization, build capacity and achieve greater impact in our community. That’s why we offer the Nonprofit Learning Series.

Throughout the year we’ll be presenting valuable training sessions on a host of topics designed to help nonprofit organizations be effective, efficient and sustainable. Recently, we have heard from local experts on board governance, fund development planning, maximizing the value of technology, marketing and social media, the importance of your workplace environment, and program evaluation, among others.

To attend an upcoming event go to: UnitedWayNCA.org/events/members

Annual Members Conference
Each summer, United Way NCA holds a gathering open to all member nonprofits. At the Annual Members Conference you will learn about benefits and responsibilities of United Way NCA membership, as well as develop new skills and knowledge to enhance your organization’s efforts in workplace giving or other areas of your work.

The conference is also a great opportunity to network with United Way NCA staff, meet colleagues in the nonprofit sector and visit a nonprofit expo where you can learn about resources that might benefit your organization.

Community Impact Grants

Our regional Community Action Funds provide an alternative for donors. The funds are distributed through a competitive grant process. The grant categories align with our key focus areas and the application period begins in the fall. After completing a full year of membership all United Way NCA members meeting funding priority guidelines are eligible to apply.

For questions about grants, please contact us at: grants@uwnca.org.
Marketing and Outreach

Social Network
Join our social network. Follow us on Twitter @UWNCA and “like” us on Facebook at Facebook.com/UnitedWayNCA.

Social media is a great way to stay connected and is a key part of how we communicate and engage with our supporters and community partners. Our nonprofit members are encouraged to share their activities, successes and events with us. Interact with us often, write on our wall, comment on our statuses and tweet about what’s going on with your organization. United Way NCA is committed to sharing your news with our supporters; therefore, we ask for your help in sharing our news with the people in your social networks as well.

Workplace Campaign Brochure
As a member, your name and United Way designation code will be listed in our annual brochure, which is distributed at workplace campaigns, community events and in our annual direct mail solicitation.

Impact Story Submission
Send us your stories about how you have changed lives in the community. The most compelling cases for charitable giving demonstrate real transformations in people’s lives. Show us how your organization has improved people’s lives. To get guidelines and submit your story, go to UnitedWayNCA.org/shareyourstory.

Online Giving Platform
United Way NCA’s online giving platform allows donors the option of giving directly to member organizations. If your organization does not have its own online giving mechanism, you may link your donors to this page to provide them with an online donation option.

A member listing is also available on the United Way NCA website at UnitedWayNCA.org.
Use of the United Way NCA Brand
Tell the community that you are a “Proud Member” of one of the most valued brands in the world. United Way has the third most identifiable brand in the nonprofit arena according to an analysis by Cone LLC and Intangible Business. And, we are the only nonprofit organization to make the Forbes’ list of the most valuable brands in the world.

The use of the United Way NCA brand is more than just a requirement of membership; it’s a mark of distinction. The more we get the United Way NCA name out in the community, the more people will identify the name with good work. That provides mutually beneficial results for both United Way NCA and the members of our network.

The “Proud Member” logo must be displayed on all of the following items and be clearly visible:
- website
- brochures and promotional materials
- e-newsletters
- entrance to all facilities (we have signs at UnitedWayNCA.org/store)
- advertisements

Co-Branded Merchandise and Proud Member Signs
United Way NCA provides an array of promotional merchandise that members can purchase at competitive prices. We offer items of various price points, including pencils, t-shirts, water bottles, pens and much more. All of these products make it easy to let the recipient know that you are a trusted part of the United Way NCA network of organizations improving lives in our community.

The United Way NCA Store is also where you can order your “Proud Member” signs. United Way NCA has paid for the production of the signs. You only have to pay for the cost of shipping.

Be sure to bookmark the store site at: UnitedWayNCA.org/store.

You may see all the co-branding requirements at UnitedWayNCA.org/members-cobranding.

Follow us on Twitter @UWNCA

“Like” us on Facebook at Facebook.com/UnitedWayNCA.

We are committed to increasing the numbers of healthy children, young people and adults in our community.
Financial Information

Member Portal

United Way NCA makes it easy for you to access check payout reports, donor lists and payment process information through our Member Portal. This is a secure online platform where you can access all the information you need.

Your organization’s login credentials are sent to the person designated as your “primary representative” on your application.

For assistance, please contact our Membership Department at 703.549.4448, or membership@uwnca.org.

Note: the Member Portal is only open for active United Way NCA members of the current campaign year.

Bookmark this link: https://secure.uwnca.org/uwnca/epledge/crm/start.jsp.

We support effective programs that keep students on track academically, give struggling students extra help, and prepare all young people to transition to high school and beyond.
**Disbursement Cycle**

United Way NCA fully manages the collection and disbursement of donor designated funds for our member nonprofit organizations. With 40 years of experience, we provide timely and efficient payment delivery as well as complete and accurate reporting on donors and donations. That leaves you more time to focus on the important work of carrying out your service to our community.

United Way NCA offers the option for payments for all designations and grants via Automatic Clearing House (ACH) directly into your checking account.

Direct deposit will help eliminate lost or misplaced checks and it will get you your money faster. You will receive an email notification that will serve as the remittance advice.

Forms to request direct deposit are available in the member portal or by contacting us at membership@uwnca.org.

**Pledges and fully paid donations come in September 2014 – January 2015**

**Monthly or quarterly aggregated payments come in to United Way NCA**

**Quarterly payouts are made to member nonprofit organizations**

**Payroll deductions begin in January 2015**

**Fully paid donations (one-time gifts) are paid to member nonprofit organizations in February 2015**

**All payments for the 2014-2015 campaign are paid out by December 2016**

Member nonprofit organizations thank donors.

United Way NCA thanks all of your donors, but donors also want to hear from you. We make it easy to download your donor reports so you can reach out directly and thank each donor for his or her gift.
Member Engagement

Member Communications

United Way NCA provides relevant information, resources, announcements about capacity building and learning opportunities and time sensitive news through our website, on Facebook and Twitter, and by email and direct mail. Please be sure to read our communications so that you will have the latest information regarding your campaign and United Way NCA’s programs and initiatives.

Members’ Page of United Way NCA Website

Our Members Page is the go-to place for information and resources. Bookmark UnitedWayNCA.org/members to read news and updates; get info on membership criteria, the grant application process and CFC information; and download ad templates, logos and more.

Members-Only Notifications

Members-only notifications are designed to provide quick, concise and specific content of interest to member organizations, such as important deadlines, learning events and member news. Notifications are sent to the people identified on your membership application.

You can make sure to keep all of your staff in the loop by subscribing them to receive the notifications. An individual can also self-subscribe using the link on the Members Page of our website at UnitedWayNCA.org/newsletter.

Be an Active Member

As a committed partner in improving lives in our community, you can take positive steps to make the most of your membership by:

- Promoting your United Way NCA and CFC designation codes.
- Signing up to participate in the Speakers’ Bureau, Member Tours, and United Way NCA and CFC events. To register, go to UnitedWayNCA.org/speakers-bureau.
- Opening your doors to corporate volunteer groups who want to lend a hand with your organization.
- Sharing your success stories with United Way NCA. We want to know about your outcomes and hear from the people whom have benefitted from your services. Submit your stories via our online form at UnitedWayNCA.org/shareyourstory.
- Following us on Twitter @UWNCA and Liking us on Facebook at: Facebook.com/UnitedWayNCA.

Run an Internal Campaign

As a United Way NCA member, your organization is encouraged to run an internal workplace giving campaign to provide your employees the opportunity to give to the causes they care about. Employee participation is always voluntary.

Our campaign staff is here to help you. You can find resources and more information about how to run a workplace campaign here: UnitedWayNCA.org/workplace-campaigns.
Thank you for choosing to be a part of the United Way NCA federation of member nonprofits. We recognize that the strength of our organization depends a great deal on the success of our members. We are committed to helping you achieve that success and do all we can to make your partnership with United Way NCA a rewarding experience.

Working together we can improve the lives of individuals and families in need throughout the national capital area. That's what it means to Live United.

General Questions
Call 703.549.4448 or email membership@uwnca.org.