



**2017-2018**

# **PARTNER QUICK START GUIDE**

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

These benefits and responsibilities are in effect from July 2017 through June 2018



**United Way  
of the National Capital Area**

[UnitedWayNCA.org](http://UnitedWayNCA.org)

# LIVE UNITED<sup>®</sup>

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# ABOUT UNITED WAY OF THE NATIONAL CAPITAL AREA

UNITED WAY FIGHTS FOR THE HEALTH, EDUCATION AND FINANCIAL STABILITY OF EVERY PERSON IN EVERY COMMUNITY.

**United Way of the National Capital Area (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.**



## HEALTH

Healthy, active and well-nourished children are more likely to attend school, be alert, engaged in the classroom and ready to learn.

At United Way NCA, we know that we won't achieve our education goals without focusing on children's health and wellness as well. As we work with middle schools in our region to increase student achievement, we coordinate access to health, wellness, physical fitness and nutrition programs for students in those schools.

We also continue to connect people in need to health and human services through the 2-1-1 call center.

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**USING A COLLABORATIVE MODEL,  
WE WILL HELP MORE MIDDLE  
SCHOOL YOUTH SUCCEED.**

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## EDUCATION

To help low-income youth succeed in high school, United Way NCA invests in bringing together collaborative non-profit partners to offer comprehensive wraparound services in targeted middle schools in the eight regions we serve.

These partners provide services including academic tutoring; mentoring; afterschool and enrichment programs; medical, mental and dental care; parental engagement; housing and homeless services; financial stability programs; and physical fitness and healthy food programs.

Using this collaborative model, we aim to prepare more middle school students to succeed at the high school level and ultimately graduate.

## FINANCIAL STABILITY

Our goal is to help people achieve financial stability and remove barriers to stable and affordable housing.

To increase financial stability in our region, we provide residents with access to high quality asset-building and financial planning resources through new Financial Empowerment Centers.

Our goal is to connect families to banking services, credit counseling and financial planning tools that will allow them to manage debt, save, plan for the long-term and thrive.

We also want to serve and support the individuals and families experiencing homelessness in our community. To help address their immediate needs, we are once again bringing the nationally-recognized Project Homeless Connect model to our own community later this year.

# ABOUT BEING A UNITED WAY NCA PARTNER

United Way NCA strives to offer nonprofit partner 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.

## PARTNER ELIGIBILITY

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

All United Way NCA partners are locally-based, 501c(3) nonprofit organizations, providing local services in the eight regions we serve. Partners 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 partnership. All current partnership requirements are located [on our website](#)

## PARTNER TERM

Our campaign/partnership 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.

## PARTNER BENEFITS

As a nonprofit partner of United Way NCA you have access to funding opportunities, resources for outreach and promotion, and learning opportunities to help you support your mission, garner new advocates and increase your effectiveness in our community.

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**CONNECTING PEOPLE IN NEED WITH LOCAL RESOURCES AND ASSISTANCE IS A CRITICAL PART OF OUR MISSION.**

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# FUNDING OPPORTUNITIES

Partnering with United Way NCA gives your nonprofit access to funding through workplace giving campaigns and Community Impact Grants. Additionally, you can receive donations through our online giving platform.

## WORKPLACE GIVING

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.

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 partners through our workplace campaigns, where donors are able to designate their payroll-deducted contributions directly to individual nonprofit organizations.

Once your organization's application for partnership is accepted, our experienced team will then apply on your behalf for inclusion in 500+ corporate, municipal, Federal and state workplace campaigns.

Note: Associate Partners will not be represented in workplace campaigns. They can receive donations if a workplace allows donors to write-in organizations.



# COMBINED FEDERAL CAMPAIGN

**On your behalf, United Way NCA will apply to the Combined Federal Campaign (CFC) of the National Capital Area. United Way NCA Community Campaign Partners are required to participate in this campaign.**

The CFC provides access to hundreds of thousands of Federal employees who donate tens of millions of dollars to United Way NCA and our partners 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 6-digit CVC designation code.

## PROMOTE YOUR DONOR DESIGNATION CODE

Your 4-digit United Way NCA designation code is how donors who give through United Way will be able to identify you as the beneficiary of the gift.

With the universal giving continuing this year, your 5-digit CFC designation code is how Federal employees across the country identify you as a beneficiary of their gift through the Combined Federal Campaign.



United Way NCA Designation Code  
XXXX



CFC Designation Code  
XXXXX

## COMMUNITY IMPACT GRANTS

Our regional Community Impact Funds provide an alternative for donors who prefer to donate to a cause in lieu of designating a particular nonprofit. The funds are distributed through a competitive grant process and are for programs that support our core impact areas of education, financial stability and health. The application period begins in the fall for a two-year grant cycle.

For questions about grants, please contact us at [grants@uwnca.org](mailto:grants@uwnca.org).

## ONLINE GIVING PLATFORM

United Way NCA's online giving platform allows donors the option of giving directly to partner 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 partner listing is also available on [our website](#).



## 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.

### 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 partners to do just that. Our corporate community partners and the Federal workplaces are interested in hearing directly from our partner nonprofit organizations. In addition to speaking engagements, nonprofit fairs also take place during the 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 [our website](#).

### PARTNER TOURS & VOLUNTEER PLACEMENT

You can invite donors into your organization to see how you change lives each day. We organize partner tours and volunteer days for different groups, including employees at workplace campaign sites, leadership donors and other groups. This program connects willing community partners 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 on [our website](#)

### 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 partners 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 partner, 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.

*Note: Associate Partners will not be featured in the brochure.*

### 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 submit a story, email [liveunited@uwnca.org](mailto:liveunited@uwnca.org).



## COMMUNITY EVENTS

Partners have the opportunity to participate in community events powered by United Way NCA. United Way NCA and local nonprofits partner in support of Do More 24, the community-wide day of giving.

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 partners and other key community partners, we provide direct services to area residents.

**WE APPLY THE AGE-OLD ADAGE, “THE WHOLE IS GREATER THAN THE SUM OF ITS PARTS,” BY FACILITATING COLLABORATIVE COMMUNITY IMPACT EVENTS THROUGHOUT THE NATIONAL CAPITAL AREA.**



**WE ARE COMMITTED TO IN-  
CREASING THE NUMBERS OF  
HEALTHY CHILDREN, YOUNG  
PEOPLE AND ADULTS IN OUR  
COMMUNITY.**

## USE OF THE UNITED WAY NCA BRAND

Tell the community that you are a “Proud Partner” of one of the most valued brands in the world.

The use of the United Way NCA brand is more than just a requirement of partnership; 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 partners within our network.

The “Proud Partner” logo should be displayed on all of the following items and be clearly visible:

- website
- brochures and promotional materials
- e-newsletters
- entrance to all facilities

## LEARNING OPPORTUNITIES

We can help you build organizational capacity. Throughout the year we 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 [events page](#).

### NONPROFIT 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. Workshops have included topics such as 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 our [events page](#).

### ANNUAL COMMUNITY MEETING

Each summer, United Way NCA holds a gathering open to the nonprofit and business community. At the Annual Community Meeting you will learn about United Way NCA, as well as develop new skills and knowledge to enhance your organization's efforts and capacity.

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



# GETTING THE MOST OF YOUR UNITED WAY NCA PARTNERSHIP

## FINANCIAL INFORMATION

### Partner Portal

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

Your organization's log-in credentials are sent to the person listed as the "primary representative" on your annual nonprofit application.

An administrative fee is assessed to each donation processed by United Way NCA. The fee is necessary to cover the costs associated with vetting partners as well as coordinating, marketing and executing workplace campaign participation for our partners.

For assistance, please contact our Partner Engagement Team at 703.549.4448, or [partner@uwnca.org](mailto:partner@uwnca.org).

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



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**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.**

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# DISBURSEMENT CYCLE

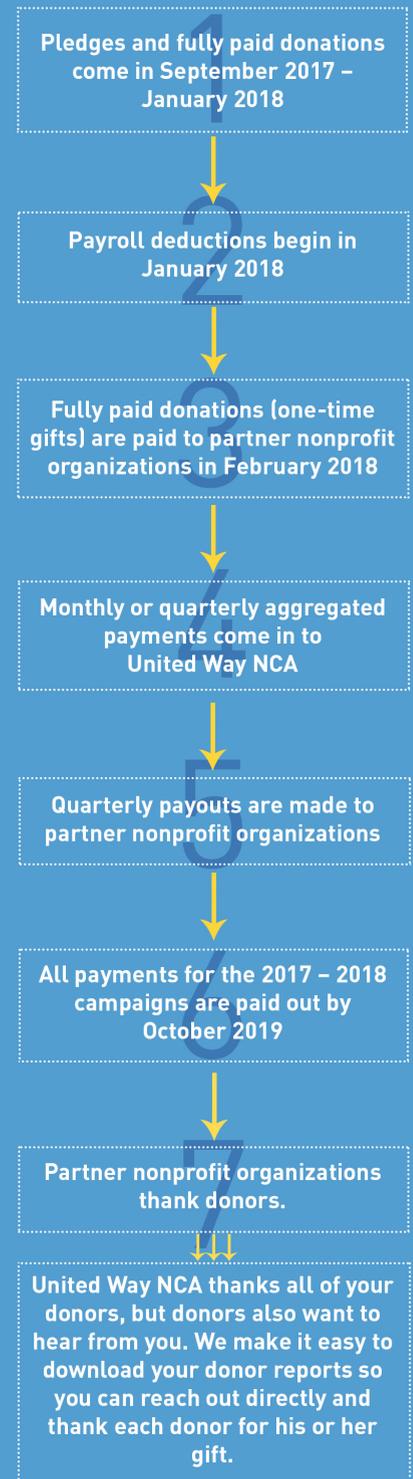
United Way NCA fully manages the collection and disbursement of donor designated funds for our nonprofit partner organizations.

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 funds faster. You will receive an email notification that will serve as the remittance advice.

Forms to request direct deposit are available in the Partner Portal or by contacting us at [partner@uwnca.org](mailto:partner@uwnca.org).



# PARTNER ENGAGEMENT

## PARTNER 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.

### **Partners' Page of United Way NCA Website**

Our Partners Page is the go-to place for information and resources. Bookmark our [partner page](#) to read news and updates; get info on partnership criteria, the grant application process and CFC information; and download templates, logos and more.

## BE AN ACTIVE PARTNER

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

- Promoting your United Way NCA and CFC designation codes.
- Signing up to participate in the Speakers' Bureau, Partner Tours, and United Way NCA and CFC events. To register, go to [our website](#).
- 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. To submit a story, email [liveunited@uwnca.org](mailto:liveunited@uwnca.org).
- Following us on [Twitter @UWNCA](#) and Liking us on Facebook at [Facebook.com/UnitedWayNCA](https://www.facebook.com/UnitedWayNCA).

## RUN AN INTERNAL CAMPAIGN

As a United Way NCA partner, 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 on [our website](#).

# THANK YOU

Thank you for choosing to be a part of the United Way NCA network of nonprofits. We recognize that the strength of our organization depends a great deal on the success of our partners. 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.

## Join the Conversation



@UWNCA



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