



UPIC
solutions

Technology on a Mission:
Empowering United Ways

Vision 2020



From our CEO

To our stakeholders,

In the 16 years we have been doing business, helping United Ways grow, adapt, and evolve has been the driving force behind everything we do at Upic. Technology is only useful if it enables United Ways to transform the way they engage with donors, empower employees, optimize operations, and reinvent business models. Upic is positioned to do all of these. In this document, we share with you our vision for how we will achieve these goals.

Technology is increasingly inside everything—data volumes continue to rise and connectivity has become expected and pervasive. In the current landscape of company-driven campaigns, competitive fundraising, and cultural changes experienced by most organizations, United Ways will need to adapt and embrace new ways of connecting people, data, and processes.

Through my own experience as Upic CEO, I recognize how uniquely poised we are to help United Ways embrace and overcome the technology challenges of today with agile platforms and services capable of accelerating the United Way mission into tomorrow.

My team and I are deeply invested in helping United Ways thrive into the future. We hope you join us in support of our continued efforts to provide state-of-the-art business and technology solutions that help mobilize the caring power of communities and advance the common good.

Sincerely,

A stylized, handwritten signature in black ink, consisting of a large, sweeping 'J' followed by a smaller 'R' and a horizontal line.

J.R. Howard

Chief Executive Officer





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Our Mission

To help United Ways mobilize the caring power of communities and advance the common good by providing state-of-the-art business and technology solutions.

Our Vision

To accelerate the mission of United Ways by working together as one with innovative business and technology solutions.



Guiding Values

Community
Engagement



Creativity and
Innovation



Empowerment and
Accountability



Knowledge and
Intentionality



Honesty and
Integrity



Strategic Priorities



Empower United Ways with Mobile and Cloud Technology



Enable and Personalize United Way Donor Engagement



Optimize United Way Operations



Provide an Unparalleled Customer Experience to United Ways

We fight to empower United Ways with mobile and cloud technology



- Anytime, anywhere, anyhow access to United Way data.
- Secure United Way data from natural and man-made threats.
- Help United Ways focus on their mission instead of technology.

“Upic Solutions has been a significant and dependable partner with our United Way. They have provided excellent support both behind the scenes and when needed, face-to-face with our valued customers.”

— **David Jackson**, Software Specialist,
United Way of Central Carolina

Aspiration

Empower United Ways to change the world with mobile and cloud technology that just works.



- Developing and supporting the next generation of mobile and cloud technologies for United Ways.
- Enabling industry leading agility, innovation, and redundancy by moving applications to the Amazon and Microsoft clouds.
- Securing donor data from modern threats with continuously evolving security practices and end user training.



We are the game changers that enable United Way donor engagement



- Creating great individual experiences for United Way donors and volunteers.
- Providing a central hub for all donor engagement and data integration.
- Supporting key United Way initiatives like DSOG and Rubicon.

“Upic provides us the tools to work more efficiently and communicate more effectively with donors.”

— **Cheryl Nelson**, CFO, United Way of Central Ohio

Aspiration

Modernize the United Way donor experience by igniting their passion with personalized engagement.



- Developing Community Connect as the single point of integration for United Way systems, like DSOG, Rubicon, and Salesforce.
- Modernizing individual engagement with processes like donor journey mapping and activity tracking.
- Helping United Ways re-invent business models by connecting people, processes, and technology.



We raise our hands to optimize United Way operations



- Flexible IT that maximizes technology value and minimizes complexity.
- Collaboratively engage with United Ways to find solutions to tough problems.
- Improve decision making with optimized business processes.

“Patient, attentive, great ability to handle surprises, cares about getting it right and willing to keep going until the issue is resolved .”

— **Michelle Campbell**, Finance Manager & ePledge Coordinator, United Way of Lincoln and Lancaster County

Aspiration

Optimize operations and drive maximum efficiencies across United Ways.



- Working collaborative as one, with United Ways, to build the solutions of tomorrow.
- Maximize the use of business intelligence to enable faster decision making with tools like PowerBI.
- Help United Ways during staff transitions, disasters, and technical challenges.



We unite to provide an unparalleled customer experience to United Ways



- Trustworthy experts focused on the United Way mission.
- Embody a customer-first culture.
- Easy access to service and support.

“The commitment that Upic takes to the success of their client is without equal ... there is no one more customer service driven that is willing to go above and beyond in the effort to deliver on-time, every time.”

— **Dean Guess**, Information Systems, United Way of the Midlands

Aspiration

Make our customers raving fans who value our level of service, United Way knowledge, and technology expertise.



- Focus on being the United Way market leader.
- Real people dedicated to helping United Ways with technology.
- Engage with United Ways to learn and improve processes, so we can hit the ground running when help is needed.





Our Solutions

Upic offers United Ways affordable access to innovative, mission driven technologies. We help United Ways leverage these technologies while reducing complexity, increasing efficiency, and delivering peace of mind and a great user experience to staff and donors alike.

Virtual Office

- A remote desktop solution, housed in the cloud, secured and hosted for United Ways on Amazon Web Services.
- Provides anywhere, anytime, anyhow access to United Way data and systems.
- Includes end-user PC support, remote PC management, and email hosting.



Community Connect

- A central hub for donor engagement built for United Ways to cultivate and retain donors.
- Tracks meaningful touchpoints and personalized experiences.
- Built on Microsoft Dynamics 365.
- Integrates with other business applications, including: Office 365, PowerBI, ClickDimensions, Wealth Engine, LinkedIn, Eventbrite, Andar/360, and more.



Online Giving Services

- Expert support team for online giving platforms such as Truist, ePledge, and Workplace Giving Portal.
- Personalized site configuration, development, and email messaging at a reasonable price.



Strategic Services

- Proactive application support for Community Connect and Andar/360.
- Provides a source for expert training, application helpdesk support and project work on demand.
- Integration Services connects key applications and data.
- Custom report writing and business intelligence for Community Connect, Andar/360, and more.



“Dependable, efficient, and resourceful. Response times are quick, and if the crew doesn’t have an immediate answer or solution – they will research until confident of their understanding.”

— **Dennis E. Renschler**, Director, Technology, Central Services, & BIMS, Metro United Way



Our Impact



Our helpdesk ranks 99%+ on customer satisfaction, handling over 17,000 United Way tickets annually.



Our United Ways raise over \$853 million annually, with over 2400 United Way team members utilizing Upic's services.

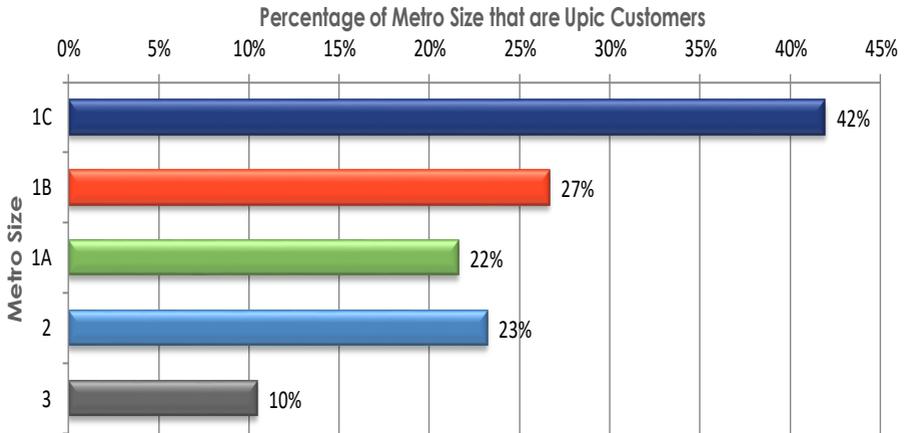


We build over 460 online giving sites and our analysts deliver over 870 United Way projects each year.



We donate \$50K of services to United Ways annually, in addition to sponsoring and supporting United Way conferences.

How Many United Ways Work with Upic



“Every dollar we don’t spend on technology is a dollar that can fund a mission-critical activity or go back into the community.”

— Cheryl Nelson, CFO,
United Way of Central Ohio



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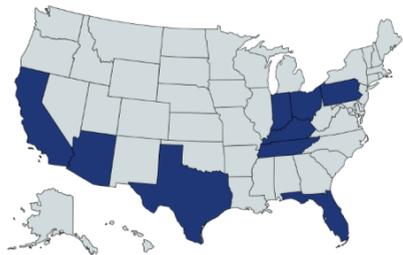
Our Team

Our team of incredibly talented and passionate people are proud to make a difference in their community by doing work they love every day.

Our stats:

- 25 team members
- 373 years of United Way technology experience
- 100% participation in our workplace campaign

Where is our team?



Our Board

Betsy Lowder, CFO, United Way of Greater High Point

Gil Betz, CSO, Metro United Way

Cheryl Nelson, CFO, United Way of Central Ohio

Doug Brueckner, VP Information Technology, Total Quality Logistics

Jerilyn Sinskey, VP and Data Officer, United Way of Greater St. Louis

Kathy Doty, COO, United Way of Greater Toledo

Tina MacVeigh, CSO, United Way of Greater Cincinnati

Bob Berdelle, Retired CFO, United Way World Wide

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