

Enhanced Workforce Pilot— Mobilizing companies and individuals

Webinar for Mobilization United Ways
July 25, 2012

LIVE UNITED

**United
Way**



How do we mobilize our workforce corporate partners and the individuals who work in these companies to give, advocate and volunteer for education, income and health?

(How do we stop thinking about them as a campaign and think about engaging them in the work and issues of our community... on an ongoing basis?)

Enhanced Workforce Pilot: Goal: 5 companies, 5 tactics, started June 2011



Tactics for the Common Good

Enhanced Workforce Pilot –

Results United Way of San Diego County Report

United Way
of San Diego County

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Workforce pilot purpose & tactics

1. Engage CEO and other “C” suite executives based on their CSR
2. Focus on a specific Community Impact area/strategy
3. Obtain donor names & personal contact information and opportunity to communicate with all employees
4. Use a technology platform to run e-pledge campaigns/leverage donor information that provides timely donor gift data*
5. Implement a year round, two-way calendar for communication and engagement

Objectives & Metrics

OBJECTIVES:

- Provide an outstanding donor experience
- Provide compelling information & engagement opportunities so that individuals want to become involved in the movement
- Obtain personal contact information
- Recruit high-potential new donors

METRICS:

1. Donor/customer satisfaction
2. Donor/customer engagement

Other improved metrics:

1. (+) Participation
2. Donor retention
3. (+) Donor segment behavior
4. (+) Undesignated (RUM) revenue
5. (+) Corporate financial support

Enhanced Workforce Pilot Activities

- CEO Meeting (multiple-engagements)
- Executive Meetings: "C" Suite
- Expanded Partnership Specific CI Messaging
- Community Conversations
- Internal Communications
- Access to Employees
- Access to Donor Data
- Direct donor Communication
- Electronic Giving
- Timely Donor Data
- Engagement Calendar
- Volunteers
- Volunteer Opportunities

Results

- 5 Workplace partners
- 2010-11 Card Value (cumulative): \$1.6M
- 2011-12 Results (cumulative):
 - Overall Revenue: \$1.7M, + 6%
 - RUM: + 9%
 - Participation: average 44%, -8%* OR 46%, +1%**
 - Leadership Giving: + 12% Leadership givers, + 3% dollars

AND: +2000 volunteers overall

*1 accounts results (participation & dollars) under review

**results w/o account under review

Lessons learned

- Use community conversation & discovery questions to your advantage
- Go to C-EO (community engagement opportunity) visits with key volunteers/members of leadership team
- Illustrate the value of undesignated dollars or ‘designated dollars to impact’
- Leverage WLC as a springboard to segmenting and deepening relationships
- Don’t take the numbers for face value—double check for accuracy
- LISTEN LISTEN LISTEN so you can better ASK, THANK, & INFORM on how to GIVE, ADVOCATE & VOLUNTEER

Enhanced Workforce Campaign – Lessons Learned

1. **Companies are open...**and in some cases, eager...to work with United Way to further community work.
2. The **CEO relationship is key** to opening doors to engage people.
3. **Engagement needs to be ‘issue-based:’** companies and individuals want to support a specific community focus area.
4. **Really listening to company interest/needs/culture to customize engagement** for each company is key.
5. Enhanced Workforce Campaign “spirit” has led to **focus** (prioritizing accounts), **creativity** (Portland’s storytellers) and **UW staff collaboration**.

Enhanced Workforce Campaign – Lessons Learned

6. **12-24 month engagement and communication calendars** create a continuous movement and ways to engage.
7. **Data analysis** quantifies results and points to weaknesses and opportunities.
8. **Targeting a limited number of companies** provides focus, builds confidence and knowhow, produces results that foster pride and starts a learning curve that influences how other accounts are engaged.
9. **Prioritization of accounts** based on relationship-potential is a major component.
10. **Specific tactics** could be modified and expanded for greater impact.

2013

Roll out to network with Mob Group Priority

What would help you?

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