

## **The Enhanced Workforce Campaign – Making a Good Thing Even Better - and a Catalyst for Change at your United Way**

United Way's annual campaign is the cornerstone and anchor for raising funds for our communities. With the campaign, we gain access to 50 million individuals nationwide – an incredible number. This unique and unparalleled access to thousands of companies around the globe – and the community residents who work in these companies – drives us to optimize its effectiveness and change how we are organized and how we prioritize and do our work.

Over the past two years, United Way Worldwide has engaged numerous partners in determining best practices and strategies to enhance our campaign. The Center on Philanthropy at Indiana University has provided national donor and corporate surveys. More than 20 United Ways have helped develop Recruitment & Retention Toolkits, and the Global Corporate Leadership Advisory Council has been partner in this effort as well.

Optimizing the effectiveness of our annual workforce campaigns and using them as catalysts for changing how we work stems from the central premise that we need to strengthen our relationships with companies and our individual employees within these companies. And all of this starts with listening and connecting the dots about what is important to them and our community work. We are looking for the “sweet spot” where the needs and interests of our supporters intersects with engagement (giving, volunteering and advocating) to make progress on specific community work.

Listening can take on many forms. On the corporate side, it means being knowledgeable about a company's Corporate Social Responsibility goals, causes they have supported and the interests of the CEO and senior management. Visits with the CEO and other executives to listen to and probe their business needs, philanthropic interests within and perhaps beyond your local community and their personal passions are invaluable for you to create a customized program to engage them in your work. These discussions should focus on the company and the individual CEO and not last year's annual campaign dollar results. To do so limits your ability to relate to them, learn about new ways to partner for mutual benefit, broaden their perspective on how United Way can be a valuable resource and collaborator, strengthen your credibility and gain their trust.

Listening to our donors starts with conducting community conversations. Finding out what causes employees care about can help you connect employees with customized, relevant opportunities that are aligned with their interests and United Way's goals. This allows for more opportunities to improve community conditions so they can give, advocate and volunteer year-round. Finally, to improve relationships with employees it is crucial to genuinely thank them and share the impact they are making.

In June of 2011, a group of 19 United Ways launched Enhanced Workforce Campaign efforts, each focusing on working closely with five companies to implement five “tactics” (effective CEO calls, issue-based campaigns, direct communication with employees, more e-

campaigns, 12 month engagement and communication calendar). This pilot group focused on specific and strategic areas of community impact. One group, for example, focused the majority of its efforts on early grade reading.

Based on learning from this pilot, these five tactics have evolved into four core elements of Enhanced Workforce Campaigns:

1. Listening and connecting the dots about how to partner = RELATIONSHIPS
2. CUSTOMIZING our response = Issue-based messaging, campaigns and initiatives
3. Offering compelling ways to Give, Advocate, Volunteer NOW & LATER = All Year Long
4. Creating “DONOR-CENTRIC” focus = thanking and informing donors about their impact

This focus has prompted some of the pilot United Ways to change how they are organized and how they do their work:

- They now divide and prioritize corporate accounts based on which are or could be relational with more potential for engagement and support, and which are transactional
- Account managers are now relationship managers, with most of their time calling on relational accounts to listen to, learn about and partner with them in new ways
- Customized, “living,” account plans are created for relational accounts, which include resource generation but also year round engagement strategies
- They are investing in creating relevant stories to communicate their work and compel people to say “I’m in.”
- They are focused on volunteer engagement
- They are retooling their internal processes to support this work

Plans are in place to share even more of the best practices and lessons learned from the 2011 pilot group, and we are pleased that we’ll be able to share even more tips on improving the ever-important workforce campaigns. For more information or to ask questions, contact Louise Kenny, Director, Investor Relations at [louise.kenny@unitedway.org](mailto:louise.kenny@unitedway.org) or 703-836-7112 x570.