

# Enhanced Workforce Campaigns

## Lessons Learned

### Executive summary

Community Investor: “What can I do here in (anytown) to improve education, help working families achieve financial stability and improve my health and that of others here in (anytown)?”

### Local United Way CPO:

**“How can we mobilize our workforce campaigns so that they serve as vehicles to companies and the individuals who work in these companies to see United Way as pivotal to making community change happen and feel compelled to take action by giving, volunteering and/or advocating?”**

**“How can we research companies and really listen to them to learn what really matters to them – their business needs, their Corporate Social Responsibility goals, their corporate culture, the interests and passions of their key executives – so that we can help them meet their needs and, in so doing, they can partner with us in new, creative ways that further specific community work?”**

United Way’s Enhanced Workforce Campaign helps answer these questions. It evolves United Way’s traditional workplace campaign to capitalize on its amazing, unique strength – access to over 50 million people in this country and the best way to reach many people in individual communities.

As such, it needs to be re-positioned and revitalized to our United Way our boards, our staffs, companies, volunteers, current donors and people who care about education, income and health. It needs to be a continuous, issue-based, mobilizing movement and source of information, provide engagement opportunities, highlight the company’s enthusiastic endorsement of United Way and our value, tie to the company’s and individual employee interests and thank donors and relate to them the impact of their gifts. United Way’s Enhanced Workforce Campaigns also serve to coalesce United Way staffs to work together to tell the story of their work in compelling ways and create opportunities for community residents in companies to personally contribute to this work. It is a major rallying point.

### Enhanced Workforce Campaign Pilot Group

In June, 2011, 20 United Ways (see last page for list of participating United Ways) formed the Enhanced Workforce Campaign pilot group to focus on implementing in 5 or more companies, specific tactics to deliver a motivating corporate and individual experience closely tied to our Community Impact work. These tactics were:

1. **Engage CEO and other “C” suite executives** to understand their business needs, CSR goals and personal interests and passions.

2. Focus the campaign on a **specific Community Impact area/strategy**
3. **Obtain donor names and personal contact information** and opportunity to **communicate directly 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 communication and engagement calendar**.

Over the past year, the group has met weekly through planned conference calls to share experiences, learn from themselves and other United Ways working to “enhanced” their workforce campaigns, share challenges and successes. Also, other United Ways have joined the group.

Metrics for this initiative include traditional campaign data (e.g., dollars raised, participation, average gift, retention, resources under management), they have also included feedback on growth of relationships, particularly with the CEO, corporate interest in partnering with United Way in different ways, employee engagement, improved alignment and collaboration within the United Way, improved telling of the story about United Way’s work, etc.)

There have been many “bright spots” – companies and their employees that are engaging with United Way in new ways – within the pilot group and at a number of other United Ways. The recommendation of the pilot group is to expand the Enhanced Workforce Campaign concept to other United Ways, expanding the list of specific tactics to implement.

## **Comparison to Enhanced Workforce Campaign to traditional United Way Campaign**

United Way’s Enhanced Workforce Campaign is built on our traditional fundraising workplace campaign in that it reaches individuals in the workplace and offers them an opportunity to make a pledge to support community work through payroll deductions.

It is different from traditional United Way campaigns in spirit, structure and desired outcomes:

- Timeframe: it is a continuous, mobilizing movement
- Opportunities for support: Community residents are given opportunities to volunteer and advocate for specific community issues they care about as well as give financial support
- Cause/reasons to give and engage: The campaign is tied to a specific issue/strategy in the areas of education, health and financial stability that is of interest to the company and its employees. It is not about supporting agencies but supporting work for a specific community issue (that may, and probably does, involve multiple organizations/agencies)
- Direct contact with donors and community residents: Campaigns are designed to reach, communicate directly with and offer ways for individuals to play an active role in furthering community work. Permission to access and

communicate with donors and community residents at companies comes from the relationships and trust we build with the company management.

- Relationships with donors: Campaigns are “donor-centric.” They honor and pay attention to individual donors by thanking them for their gifts in meaningful, sincere, personal (and creative) ways, informing them about the impact of their gifts and cultivating them so that they want to engage more and upgrade their financial support.
- Tonality and spirit: Campaigns are no longer one-size fits all. Rather they are tailored to the culture and interests of each company and the community residents who work there. They are flexible, open-minded and creative, designed to compel individuals to want to become involved and supportive and even innovative in how they become involved. They encourage people to take it personally and that they can make a difference.
- Communication: Year round communication plays a major role in enhance workforce campaigns. This can involve telling the story of our work, communicating personal stories, celebrating donors, providing information and statistics about community challenges, offering engagement and advocacy opportunities and reinforcing corporate support.
- Priorities: Corporate relationship-building and service will depend on the potential of each company and their desire to partner with United Way.
- Relationships: Relationships form the core of Enhanced Workforce Campaigns since they build trust, openness to partner with us and enthusiastic endorsement of the campaigns.
- Metrics: Campaigns are measured based traditional measurements but also on the engagement of employees, understanding and desire to support United Way’s mission and specific work and perceptions of United Way,

## **How a Company Mobilizes a United Way Enhanced Workforce Campaign:**

1. **CEO and/or other senior corporate executives meet with United Way team** to:
  - to explore corporate and philanthropic priorities and how United Way can help address these needs and goals
  - position United Way campaign in the context of their community and philanthropic interests
  - actively and enthusiastically endorse the campaign and encourage community residents who work there to become involved in helping to address specific community issues
  - support the overall theme that individuals create the kinds of change that makes the community better
2. **Campaigns are issue-based, aligned to the needs and interests of the company. There may be multiple issues.**
3. **Companies encourage and create an environment for Community Conversations.**

4. **Employee Campaign Managers** and others in the company are empowered to communicate with and engage employees in community work. Specific elements of the campaign are **co-created with United Way to form a 12-24 month communication, engagement, giving and appreciation program**. Activities that allow employees to actively and creatively contribute to community work, including Community Conversations, are encouraged and celebrated.
5. **Donors and volunteers are recognized and celebrated, particularly those who actively and creatively contribute to community change.**
6. **Affinity groups including women, younger employees and groups interested in specific community work are encouraged and engaged to play a leadership role in creating their company's campaign around specific issues, engaging senior leadership and rallying others to become involved.**
7. **Leadership participation** in volunteering and giving is supported and encouraged.
8. **Employees are encouraged to identify themselves, relate their area of interest and provide personal contact information** so that they can be communicated with based on their interest area, thanked, and informed about the impact and results of their financial support and offered engagement opportunities. They are regularly and genuinely thanked and reported to on the impact of their gifts.
9. **Companies encourage best practices** to build engagement and financial support.

### **How United Ways Mobilize Enhanced Workforce Campaigns:**

1. Provide outstanding **customer service**.
2. **Prioritize and group accounts based on potential. Focus staff and resources on high potential companies and create staff plans around activities** that build relationships and implement compelling full year campaigns.
3. **For high-potential companies, do research on and meet with CEOs** and other corporate executives to establish/build relationships and understand corporate business and philanthropic priorities; build trust by deepening and strengthening these relationships.
4. **Tell your story** – about your community work in interesting, compelling ways that the companies can use to educate and engage the community residents who work there.
5. **Co-create with the company, especially ECMs, customized 12-24 month communication, engagement, giving and recognition plans** based on company interests and United Way's community work. Include in this **Community Conversations**.
6. **Tie each campaign in with specific community impact work** – communication, engagement, giving.
7. Work with the company to **encourage employees to self identify, tell us of their interest area** and provide personal contact information.
8. **Energetically support Tocqueville, Leadership and affinity programs, particularly women, young people and groups interested in specific**

**community work** (education, financial stability and health). Provide segmented messages based on donor interests and increasing personal levels of donor experience based on giving, engagement and/or potential.

9. **Implement campaign basics and best practices**, prioritizing those that are most important and which reinforce United Way's positioning and mission. (recommended best practices to come)

**To be successful, United Way's Enhanced Workforce Campaigns must have:**

- The enthusiastic support and encouragement of the company's management based on United Way meeting their needs and interests through the campaign
- Focus on a specific issue/community impact strategy
- Communication directly to employees about the issues and United Way's mission and specific community work, presented in a compelling way (tell the story of our work)
- Opportunities for employees to volunteer or advocate in specific ways and/or encouragement to creatively contribute
- Opportunities to financially support community work through payroll deductions and other means.
- Appreciation, information and recognition of supporters in ways that are meaningful to them.

**United Ways participating in the Enhanced Workforce Campaign Pilot**

United Way of Greater Capital Region (Albany)

Capital Area United Way (Austin)

United Way of Berks County (PA)

United Way of the Low Country (SC)

United Way of Treasure Valley (Boise, ID)

United Way of Greater Cincinnati

Mile High United Way (Denver)

United Way of Southeastern Michigan (Detroit)

United Way of Lane County (OR)

United Way of Broward County (Ft Lauderdale)

United Way of Tarrant County (Ft Worth)

Heart of Michigan United Way (Grand Rapids)

United Way of Southeast Louisiana (New Orleans)

United Way of Northern Utah

Heart of Florida United Way (Orlando)

United Way of Ottawa (Canada)

Valley of the Sun United Way (Phoenix)

United Way of Pioneer Valley (Springfield MA)

United Way of Greater Portland

United Way of San Diego

United Way of Southwest Wyoming

United Way of Northwest Connecticut

### **Lessons Learned from Enhanced Workforce Campaign Pilot group (DRAFT)**

1. Companies are open...and in some cases, eager...to work with United Way to further community work. They were happy to be asked. “The CEO relationship is key to opening doors to engage individuals.
2. Tying the campaign to specific community work is a challenge since the CI work is being developed simultaneously. However, this is critical and creative ways can help solve this, e.g., relate stories, tie do research that indicates that that work has proven successful in other communities)
3. Really listening to company interests/needs/culture to customize the campaign to each company stimulates interest in working with us, builds trust, opens opportunities.
4. Enhanced Workforce Campaign “spirit” has led to focus (prioritizing accounts), creativity (Portland’s storytellers) and UW staff collaboration.
5. Twelve-twenty-four month engagement and communications calendars are viewed as a key component that helps break the traditional annual focus and provide action plan. Within this, volunteer opportunities provide the greatest challenge.
6. Data analysis quantifies results and points to weaknesses and opportunities, but is challenging for many United Ways due to limited data and capability.
7. A number of United Ways across the network are doing excellent work to make their workforce campaigns vehicles for engagement and repositioning United Way into the arenas of education, health and income and highlighting their work provides inspiration and “how to.”
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 mobilized
9. Prioritization of accounts based on relationship-potential is a major component as Enhanced Workforce Campaign concept expands at each United Way.
10. Specific tactics used could be modified and expanded for greater Impact.
11. Regular (weekly/bi-weekly) support – conference calls – help maintain focus, provide sharing opportunities, allows for discussion of specific campaign elements and builds camaraderie and shared purpose.