

UNITED WAY of GREATER MILWAUKEE & WAUKESHA COUNTY

# AMBASSADOR GUIDE

A guide to planning  
your campaign



## UNITED WAY AMBASSADORS

**Samantha Johnson**  
GE Power & Water

**Iketrena Bond**  
Housing Resources

**Ceso Sprewell**  
Boys & Girls Clubs of Greater Milwaukee

**Theresa Kuehmichel**  
Marcus Investments

**Andreas Pack**  
HUSCO



# Thank you for being a United Way Ambassador

Dear Ambassador,

United Way connects people who want to make a difference in our community with the people who need help the most. Thank you for joining us as we fight for the education, income, and health of every person in our four-county region.

As you know, we all win when a child succeeds in school, when a neighborhood turns around, when families have good health, and workers have solid jobs.

United Way's 2016 Community Campaign is kicking off and we thank you for coordinating your workplace giving campaign.

Sincerely,



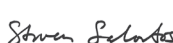
Larry Blanton  
MetalTek International



Jacqueline Herd-Barber  
Community Volunteer



Richard A. Meeusen  
Badger Meter, Inc.



Steven S. SaLoutos  
U.S. Bank



## Ambassador Benefits

- Career-building skills
- Networking opportunities
- Recognition within your organization
- Expert knowledge of the value of giving to United Way

## United Way Ambassadors

engage co-workers in building a stronger community by planning, organizing, and coordinating a successful United Way Campaign.

## Ambassador Role

- Work closely with your organization's leadership
- Work closely with your Loaned Executive
- Develop an effective campaign plan
- Recruit a team of volunteers to assist you (if needed)
- Hold campaign kickoff and recognition events
- Promote the campaign throughout your organization
- Encourage leadership giving in your campaign
- Make your campaign fun
- Thank your donors and volunteers

# Key Dates

## Ambassador Training

**Thursday, July 28 | Noon - 1:30 pm**  
United Way of Greater Milwaukee  
& Waukesha County  
225 West Vine Street, Milwaukee

**Wednesday, August 10 | 8 - 9:30 am**  
Easter Seals  
505 Northview Road, Waukesha

**Wednesday, August 10 | Noon - 1:30 pm**  
United Way of Greater Milwaukee  
& Waukesha County  
225 West Vine Street, Milwaukee

**Tuesday, August 30 | 8 - 9:30 am**  
Ruekert & Mielke  
W233 N2080 Ridgeview Parkway, Waukesha

**Tuesday, August 30 | Noon - 1:30 pm**  
United Way of Greater Milwaukee  
& Waukesha County  
225 West Vine Street, Milwaukee

**Tuesday, September 13 | 8 - 9:30 am**  
United Way of Greater Milwaukee  
& Waukesha County  
225 West Vine Street, Milwaukee

**Tuesday, September 13 | Noon - 1:30 pm**  
Ruekert & Mielke  
W233 N2080 Ridgeview Parkway, Waukesha

## Ambassador "101" Training Webinar:

Thursday, October 6, 12-1:00 p.m.

## Loaned Executives Begin

Monday, August 1

## Campaign Kickoff

Wednesday, August 31  
Milwaukee County Zoo

## Season of Caring

August – December

## Give & Win™ Sweepstakes Deadline

Friday, November 11 by 5 pm

## Community Celebration

Tuesday, December 14  
Badger Meter, Inc.

# Campaign Checklist



Denotes resources available at  
[UnitedWayGMWC.org/CampaignToolkit](https://UnitedWayGMWC.org/CampaignToolkit)

## Plan Your Campaign

- ☐ Attend Ambassador training
- ☐ Meet with your CEO to confirm his or her commitment
- ☐ Meet with your Loaned Executive to develop campaign goals, strategies & timeline
- ☐ Review the previous campaign's performance, determine opportunities & challenges
- ☐ Visit the online Toolkit for campaign materials & ideas 🛠️ [Campaign Toolkit](#)
- ☐ Set dates for employee meetings & agency tours 🛠️ [Campaign Requests](#)
- ☐ Request materials 🛠️ [Available Materials](#) & speakers through your Loaned Executive
- ☐ Send communications from the CEO endorsing & announcing the campaign 🛠️ [Sample Communications](#)
- ☐ Connect with a Donor Network Council Member at your workplace (if applicable)
- ☐ Invite retirees to your Kickoff Event
- ☐ Promote your campaign special events & meetings 🛠️ [Fundraising Ideas](#)

## Start Your Campaign

- ☐ Hold Kickoff Event with Loaned Executive and agency speaker
- ☐ Hold a Leadership Giving, Retiree, and/or Loyal Contributor event 🛠️ [Leadership Giving Campaign](#)
- ☐ Acknowledge your Loyal Contributors (10+ year donors)
- ☐ Launch special events & activities 🛠️ [Fundraising Ideas](#)
- ☐ Make sure every employee receives materials and has an opportunity to give
- ☐ Publicize interim campaign results, community facts 🛠️ [Stories](#) 🛠️ [Sample Communications](#)

## Finalize Your Campaign

- ☐ Collect pledges, calculate results & submit final report envelopes to United Way 🛠️ [Report Envelope Instructions](#)
- ☐ Review campaign results with your team & Loaned Executive
- ☐ Announce results to all employees
- ☐ Thank all contributors with a celebration event, letter or email from your CEO or a visit from a United Way representative

### What's a Loaned Executive?

They are area professionals loaned or sponsored by local businesses to help United Way with the annual community campaign. They are here to assist you with:

- Materials
- Campaign theme and strategies
- Organizing agency speakers (or to serve as your speaker)
- Additional support as needed



## DONOR NETWORKS

Donors can create lasting change while building personal, professional, and philanthropic relationships when they join a donor network. In addition to their financial support, leadership donors are key volunteers and advocates for United Way.

### Networks:

- Diversity Leadership Society
- Emerging Leaders
- IT United
- Jane Bradley Pettit Society
- Leadership Society
- LINC
- Tocqueville Society
- Women's Leadership

### Company Benefits

- Build stronger teams
- Boost employee morale & commitment
- Improve employee retention & future recruitment
- Allow individuals to utilize their skills & strengths
- Create opportunities to develop future leaders

Learn More at  
[UnitedWayGMWC.org/DonorNetworks](https://UnitedWayGMWC.org/DonorNetworks)

**“MetalTek employees have a high giving and participation rate. I believe it's a result of United Way providing the opportunity to give to an organization that they trust, is efficient, and has the wherewithal to meet the needs in the community.”**

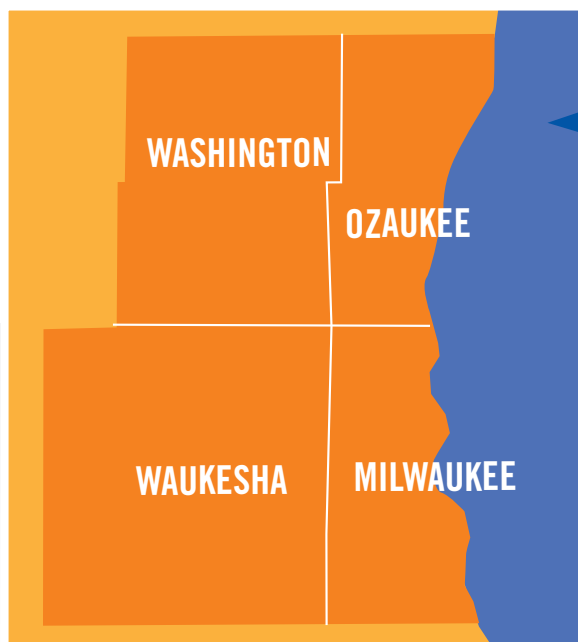
**Larry Blanton**  
*MetalTek International*



# United Way's Community Fund

Giving to United Way's Community Fund is the most efficient and most powerful way for you to invest in our community.

	United Way's Community Fund & Special Initiatives	Designated to Agency
Community needs are assessed and the most critical issues are identified	✓	
Funding stays local and is based on program performance and overall impact on our community	✓	
Rigorous program oversight is provided by United Way staff and volunteers year-round	✓	
Agencies are visited by United Way staff and volunteers to ensure program compliance and progress	✓	
Quarterly reviews of agencies' financials are conducted	✓	
Opportunity exists to double donations through challenge grant matches sponsored by companies and foundations	✓	
Donate conveniently through workplace campaign and payroll deduction	✓	✓
Donation is distributed directly to nonprofits	✓	✓



## United Way's Impact

Our focus is on Education, Income, and Health. United Way advances the common good by creating opportunities for a better life for all. United Way also invests in our community through special grants and initiatives. United Way impacts people throughout our four-county region.

## WE ARE TRUSTWORTHY & EFFECTIVE

- At United Way, we invest in programs that produce results at agencies that manage their money wisely.
- We have been recognized nationally and locally for our high rate of efficiency and consistently receive a four-star rating by Charity Navigator – its highest ranking.
- Nearly 90 cents of every dollar raised is invested into our community.



# The Best Way to Give.

A gift to United Way's **Community Fund** allows you to help more people than a gift to a single nonprofit can.

United Way experts look for gaps and duplications so **Community Fund** dollars go to the needs everyone is aware of but also to those needs less obvious but no less important.

Our community's problems are interrelated and only the **Community Fund's** diversity of programs work together to address the complex causes of poverty, teen pregnancy, homelessness, and many others – in a way that no single agency, donor, volunteer, or sector of the community can do alone.



## Match your money

When you give to any of our focus areas — Education, Income, or Health — or special initiative within the Community Fund your donation may qualify for matching funds, increasing the investment even more. Find out more: [Giving Incentives](#)



*"I enjoy giving back and supporting organizations that have a positive impact on my community."*

*Nayo Parrett,  
American Transmission Company*

## ONLY HAVE 60 SECONDS?

### Be an Advocate:

- United Way recruits people and organizations who bring passion, expertise, and resources needed to get things done.
- Giving to United Way's Community Fund is the most efficient and most powerful way for you to invest in our community. We invest nearly 90 cents of every dollar raised into community problem solving – and that far exceeds national standards.
- Our focus is on Education, Income, and Health — the building blocks for a good quality of life.
- United Way is:
  - Effective. We only invest in programs at agencies that are in good financial health and in programs with results that are measurable, sustainable, and meet current community needs.
  - Efficient. Donor dollars are leveraged with others to meet the most pressing needs in our community.
  - Local. We invest in 220-plus programs at over 110 local agency program partners in the areas of Education, Income, and Health located in Milwaukee, Ozaukee, Washington, and Waukesha County.

## Give more than a gift! Volunteer.

United Way creates customized volunteer opportunities for groups of any size, on- or off-site, with community organizations that are making a difference.

[Workplace Volunteerism](#)

To learn more or start planning your project contact:

**Karissa Gretebeck**

[kgretebeck@unitedwaygmwc.org](mailto:kgretebeck@unitedwaygmwc.org)

414.263.8160



# Good to know!

Here are a few things to keep in mind as your organization gears up to give.

## Tips for a Successful Campaign

### Get Donors Interested

78% of people are more likely to give a financial donation if they first have a positive engagement experience.

- **Share the story:** Educate employees by inviting an agency speaker to share a story about the positive impact that donor dollars have on our community. Contact your Loaned Executive or United Way staff to schedule a speaker.
- **See impact in action:** Experience how important United Way-funded programs are to the community by touring an agency. [🔗 Campaign Requests](#)
- **Volunteer during Season of Caring:** Strengthen your team and community by participating in a fall volunteer project. [🔗 Campaign Requests](#)

### Make the Ask

Research shows that the #1 reason people don't give to United Way is because they were never asked.

- **Ask for the pledge:** With new donors, ask for a first-time gift. For annual donors, thank them for their past support and encourage an increase.
- **Answer questions and handle concerns:** Answer questions honestly and if you don't know the answer ask your United Way representative.
- **Leverage incentives:** Employee prizes and incentives are a way to reward employees for participating. No prize is too small. Vacation days, VIP parking, and gift cards are great incentives. Don't forget the Give & Win Sweepstakes and Impact Coupons. [🔗 Giving Incentives](#)
- **Say thank you:** Regardless of what the donor decides, thank them for their time.

### LIVE UNITED All Year Long

We provide you with all the tools you need to show donors how United Way is using their gift, months after they've given.

- **Share facts and updates:** Send fun facts and stories via emails, newsletters, the intranet, or a bulletin board. [🔗 Sample Communications](#)
- **Connect on social media:** Advocate for United Way by posting photos of your employee volunteers in action or your special event.  
[🐦 @UnitedWayGMWC](#)  
[📘 /UnitedWayGMWC](#)

## New Event Ideas

[🔗 Fundraising Ideas](#)

### CELEBRITY BARTENDER

Become a celebrity BluTender and whip up some crafty cocktails for colleagues, friends, and family at Blu in the Pfister Hotel. Dollars raised count as a special event in your company's campaign. 10% of bar revenue & 100% of tips will be donated to United Way's Community Fund.



### TWEET IT!

Paychex provided its branch offices with branded t-shirts and placards, and encouraged employees to take selfies that were shared through their office intranet and on social media using a special hashtag.

### GET SET, GO!

Competitive events always add a splash of fun and excitement to campaign activities. Waukesha County employees team up and compete in a trike race as part of their annual campaign kickoff.





# What your dollars can do

Your gift, no matter what size, makes a difference. Plus, the dollars you donate to United Way's Community Fund stay right here in our community. For the cost of everyday items and activities, you can provide urgent and life-changing resources that impact people throughout our four-county region.

**\$5**  
WEEK

PROVIDES

**208**  
days of emergency  
food for a family of five

OUTCOME

Of the adults and families who utilized United Way-funded emergency food programs:

**98%** felt the pantry provided them with nutritious food.

**\$10**  
WEEK

PROVIDES

**26**  
group fitness classes  
to keep older adults active

OUTCOME

Of those who participated in United Way-funded older adult support and independence programs:

**89%** socialized and made friends.

**\$20**  
WEEK

PROVIDES

**15**  
days in a shelter, case  
management, and  
support services for a family

OUTCOME

Of the adults and families that utilized United Way-funded emergency shelters:

**97%** felt that their basic needs were met.



For more on what your gift can do go to [UnitedWayGMWC.org/Impact-Calculator](https://UnitedWayGMWC.org/Impact-Calculator)

## eWay: Take Your Campaign Online

eWay is an online pledging software\* that allows employees to pledge through a personalized website. You can include your company logo, CEO endorsement letter, photo, incentives, and donation instructions. Many companies using eWay have experienced increased participation and gifts.

\*Note: There is a transaction cost associated with the use of this software. Learn more at [UnitedWayGMWC.org/eWay](https://UnitedWayGMWC.org/eWay).

### Benefits

- Reduced administrative costs
- Timely reporting
- Email communication
- Confidentiality
- Automated payroll deduction files

# Thanks again!

## Company Billboard Recognition

Give a corporate gift and/or run an employee workplace campaign and your company will receive a billboard thank you:

- Each company is featured for one week on three to five digital billboards located on major area freeways.
- During that week, your company's name will appear approximately 300-600 times.

### An Evening at the Marcus Majestic Cinema

Increase your company's giving to United Way's Community Fund in 2016 by 10%\* or more for a chance to win a four-star movie experience at the Marcus Majestic Cinema in Brookfield.

Up to 15 companies will be chosen to receive 6 tickets. Feel like stars with complimentary food and beverages, networking, and movie viewing!

*\*Minimum increase of \$2,000 in overall giving required.*



Be recognized on our website and in the *Milwaukee Business Journal* for Corporate Giving, Employee Giving, and Combined Recognition results if you meet specified goals.

### THANK YOU 2015 AMBASSADOR INCENTIVE SPONSORS



Your Company Name  
Lives United. You can too.

UnitedWayGMWC.org

United  
Way



Value:  
Up to \$4,000

## Ambassador Recognition

United Way appreciates all of our 1,400+ ambassadors. To thank you and recognize your efforts, **those who attend Ambassador Training (page 2) and complete at least 5 of the activities listed below** will be entered into a drawing for prizes. (In 2015, this included weekend getaway packages and dining gift certificates). In addition, the top 50 ambassadors and their guest will be invited to the Marcus Majestic Theatre in 2017 for cocktails, a 5-star dining experience, and movie premiere.

- Have a pre-campaign meeting with the Loaned Executive
- Invite a United Way staff member or Agency Program Partner to speak to employees
- Host a Leadership, Loyal Contributor, and/or Retiree event
- Hold a special event activity
- Participate in a volunteer project
- Ensure each employee receives an individual ask
- Increase participation
- Increase overall dollars raised
- Report results and thank donors



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United  
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