

United Way of Greater Milwaukee & Waukesha County

AMBASSADOR GUIDE

A GUIDE TO PLANNING YOUR 2017 CAMPAIGN



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ManpowerGroup

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Boys & Girls Clubs of Greater Milwaukee

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Landmark Credit Union

UNITED WAY AMBASSADORS



Thank you for being a UNITED WAY AMBASSADOR

Dear Ambassador,

You are essential to the success of our Community Campaign. Without you, we could not provide the critical funds needed to support 220+ programs at more than 110 local agencies. What binds us together is the belief that each of us has a stake in the success of our fellow citizen. United, we can ensure our community thrives.

Whether this is your first time as an Ambassador or you're a seasoned veteran, this guide will help you conduct a successful campaign from start to finish.

On behalf of our organizations, United Way, and all of the people served in our four county region, we thank you for coordinating your 2017 workplace campaign.

Sincerely,



Jay M. Magulski
Landmark Credit Union



Sheila D. Cochran
Milwaukee Area
Labor Council AFL-CIO
Retiree



Matthew S. Levatich
Harley-Davidson
Motor Company



Jonas Prising
ManpowerGroup



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, August 10 | 8-9:30 a.m.
Ruekert & Mielke
W233 N2080 Ridgeview Parkway, Waukesha

Thursday, August 10 | Noon – 1:30 p.m.
United Way of Greater Milwaukee
& Waukesha County
225 W. Vine Street, Milwaukee

Tuesday, August 22 | 8-9:30 a.m.
Easter Seals
505 Northview Road, Waukesha

Tuesday, August 22 | Noon – 1:30 p.m.
United Way of Greater Milwaukee
& Waukesha County
225 W. Vine Street, Milwaukee

Wednesday, September 13 | 8-9:30 a.m.
United Way of Greater Milwaukee
& Waukesha County
225 W. Vine Street, Milwaukee

Wednesday, September 13 | Noon – 1:30 p.m.
Ruekert & Mielke
W233 N2080 Ridgeview Parkway, Waukesha

Ambassador "101" Training Webinar

Thursday, October 5 | Noon – 1 p.m.

Loaned Executives Begin

Monday, July 31

Campaign Kickoff

Wednesday, August 30
Milwaukee County Zoo

Season of Caring

August - December

Give & Win Sweepstakes Deadline

Friday, November 10

Campaign Closing Celebration

Thursday, December 14
ManpowerGroup

CAMPAIGN CHECKLIST



Denotes resources available at
UnitedWayGMWC.org/CampaignToolkit



✓ Plan Your Campaign		Target Date
Attend United Way Ambassador Training.		
Review the previous campaign's performance, determine opportunities and challenges.		
Meet with your CEO, determine your participation and monetary goals, incentives for giving, and get his/her personal endorsement.		
Recruit a Co-Ambassador or Planning Committee (if necessary).		
➡ Connect with a Donor Network Council Member at your workplace (if applicable).		
Meet with your Loaned Executive to discuss campaign strategies, themes and develop a calendar of events.		
Request materials & speakers through your Loaned Executive. 🔗 Available Materials		
Send a "Campaign Kickoff" letter from your CEO endorsing and announcing the upcoming campaign. 🔗 Sample Communications		
➡ Invite Retirees to your Kickoff Event.		
Promote your campaign and distribute your calendar of events. 🔗 Fundraising Ideas		
Consider incorporating a volunteer opportunity into your campaign. 🔗 Workplace Volunteerism		
Visit the online Toolkit any time for campaign materials and ideas. 🔗 Campaign Toolkit		
Execute Your Campaign		
Hold Kickoff Event with Loaned Executive and agency speaker.		
➡ Share your story...why do you give?		
Acknowledge your Loyal Contributors (10+ year donors).		
Hold a Leadership Giving, Retiree, and/or Loyal Contributor event. 🔗 Leadership Giving Campaign		
Conduct special events, Lunch & Learn sessions and other activities. 🔗 Fundraising Ideas		
➡ Share photos of persons participating in these events via your intranet.		
Make sure every employee receives a pledge form and has the opportunity to give.		
Publicize community facts and interim campaign results. 🔗 Stories, Sample Communications		
Finalize Your Campaign		
Collect pledges, calculate results and submit final report envelopes to your. Loaned Executive. 🔗 Report Envelope Instructions		
Review campaign results with your Committee members and Loaned Executive.		
Announce results to all employees.		
Thank all donors with a celebration event, letter or email from your CEO or a visit from a United Way representative.		

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
- Retire United
- Tocqueville Society
- Women United

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

"There's a lot of need in our region and there's no organization that's better positioned than the United Way to really understand the issues that are being faced by people across our region. They do tremendous work not only understanding those needs but aligning the funding, the volunteers, and all the resources that we need to really make a difference in people's lives."

Austin Ramirez
President & CEO, HUSCO International

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, and any additional support needed.

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.	✓	✓

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.

Your gift to United Way's Community Fund ensures that your donation is invested where the need is greatest. Donations are monitored to ensure the programs are effective, meet current community needs, and are financially stable and sustainable.



MATCH YOUR MONEY

When you give to any of our focus areas – Health, Education, or Financial Stability – or special initiative within the Community Fund your donation may qualify for matching funds, increasing the investment even more. Find out more:  **Giving Incentives**

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.



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

90% of businesses indicated that partnering with reputable nonprofit organizations enhances their brand. 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](#)
- **Create an annual engagement calendar** that includes Lunch & Learn sessions, hosting a drive, Adopt-an-Agency, site visits and more. Contact your United Way staff for more information.

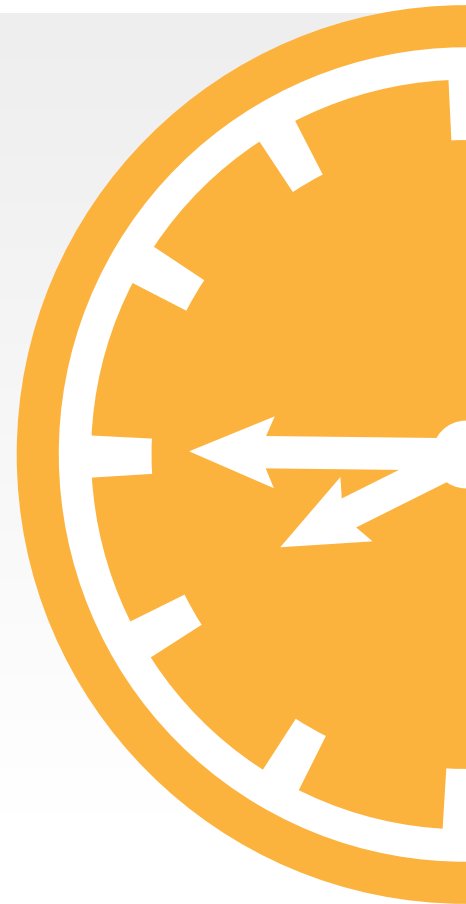


Denotes resources available at UnitedWayGMWC.org/CampaignToolkit

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.
- United Way is not a short-term investment; it's about lasting change. We surround a community's most critical problems and we fight. We fight for those who need a voice and those whose names we do not know.
- 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 Health, Education, and Financial Stability located in Milwaukee, Waukesha, Ozaukee, and Washington 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

414.263.8160



82% of employers say employees want the opportunity to volunteer with peers in a corporate-supported event.

Building an environment that is fulfilling, meaningful, and fun is not only good for employees, but can also potentially result in better business outcomes including higher productivity, increased efficiency, higher levels of customer satisfaction, and better overall business results. – Deloitte



Denotes resources available at UnitedWayGMWC.org/CampaignToolkit



VOLUNTEER EVENT IDEAS

ON-SITE

Do good without even leaving the office.

- Host a kit packing party for personal care items, birthday boxes or reading bundles.
- Coordinate a supply collection drive for school supplies, winter apparel or diapers.
- Organize a sandwich-making or snack pack assembly line.



SKILL BASED

Use your professional talents to make a difference.

- Serve as an interview or resume-writing coach at the annual *Women's Job Seminars*.
- Become a financial budgeting coach at the *Financial Empowerment Seminar*.
- Share your professional expertise and career advice with local youth at the annual *IT United Career Fair*.



LEVERAGING YOUR PRODUCT

Roll up your sleeves and do what you do best.

- Consider a product or service that you offer, can it be used to help others?
- Whether you are a transport company, mattress manufacturer or offer financial planning products, you can do good through your product.



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

IMPACT

83%

of the adults and families who utilized United Way-funded emergency food programs felt they had a better understanding of healthy eating habits.

\$10
WEEK

PROVIDES

26
group fitness classes
to keep older adults active

IMPACT

82%

of those who participated in United Way-funded older adult support and independence programs socialized and made friends.

\$20
WEEK

PROVIDES

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

IMPACT

96%

of the adults and families that utilized United Way-funded emergency shelters felt that their basic needs were met.



For more on what your gift can do go to 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.

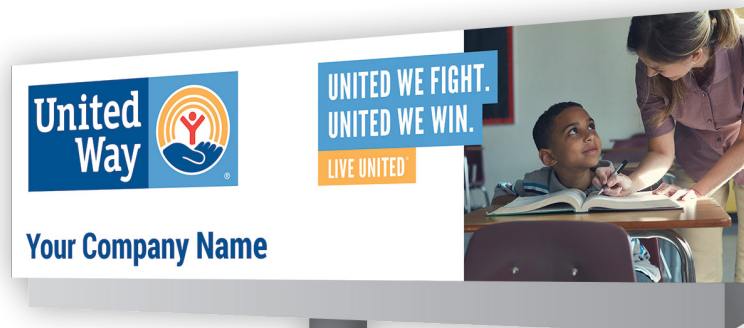
Benefits

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

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.



**Value:
Up to \$4,000**

An Evening at the Marcus Majestic Cinema

Increase your company's giving to United Way's Community Fund in 2017 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.

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 2016, 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 2018 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.



THANK YOU 2016 AMBASSADOR INCENTIVE SPONSORS



Thank you to our print sponsor



UnitedWayGMWC.org

