

**United Way
of St. Joseph County**

**RESOURCE
DEVELOPMENT
COMMITTEE**

UWSJC RESOURCE DEVELOPMENT COMMITTEE

United Way of St. Joseph County Inaugural Resource Development Committee Meeting

December 6, 2019

AGENDA

- Welcome
- Mission Moment Story
- Committee Member Roles
- Develop Your 1 Minute Story
- Game Plan/ How to
- Questions
- Thank you
- Conclude

ABOUT UNITED WAY OF ST. JOSEPH COUNTY

United Way fights for the health, education and financial stability of every person in every community. We are a part of the world's largest charity, but are known as a hyper local organization right here in St. Joseph County, and our mission is to mobilize the community to collectively reduce poverty!

- **MISSION: To mobilize the community to collectively reduce poverty.**
- **VISION: Moving people from a life of poverty to possibility.**
- **CORE VALUES: Integrity, Compassion, Intentionality, Collaboration, Dignity, and Excellence**

WHAT WE DO:

United Way of St. Joseph County is a nonprofit that is dedicated to reducing poverty in the community. In order to assist at every level and work as a whole-community solution, rather than a semi-permanent solution, United Way of St. Joseph focuses on four impact areas: Early Learning, Youth Success, Stable Families, and Critical Needs. Because we believe that reducing poverty requires the efforts of more than one single agency, United Way collaborates with and invests their funds into over 20 local nonprofits. In taking this approach, we have the unique ability to convene, collaborate, and direct resources where they are most needed. United Way conducts community needs assessments, secures critical resources to fund vital social services, provides fiscal oversight and accountability for community partners, and evaluates program results to measure and communicate community impact.

We also provide local employers, employees, and other donors a cost-effective system to address community needs while allowing other local agencies and programs to concentrate more on helping and less on fundraising. United Way gives people a trustworthy place to donate funds, knowing that their dollars will go to meet the greatest areas of need in the community and that money raised locally stays in the community. Our United Way has contributed more than \$122 million to St. Joseph County individuals and organizations since 1914.

WHY WE DO IT

- **Because 40% of St. Joseph County households are struggling to meet life's basic needs.**

HOW WE DO IT

- United Way partners with businesses, government, nonprofits and individuals like you to pull together resources and funds to drive impact. By investing in agencies and programs that impact the change in early learning, youth success, and stable families to break the cycle of generational poverty.

THE VALUE OF THE UNITED WAY BRAND:

- We hope to see our children succeeding, our families strengthened, and our community thriving.
- United Way is ranked #1 on Forbes 2018 list of 100 largest US charities.
- The United Way brand is recognized by 85% of the general public and in 95% of US workplaces.
- 78% of employees surveyed nationally want to work for a company that gives back and are proud of their employer's support of United Way.
- United Way's Public Service Announcement campaign ranks in the top 20 out of 1,000 PSA's measured.
- Independentsector.org values volunteer time at \$25.43/hour in 2018.
- United Way's most valuable asset is our unique ability to convene, collaborate, and direct resources where most needed. We concentrate on those issues that no single agency can solve on its own. We are committed to efficiency, transparency, and accountability. United Way conducts thorough research that supports our community investments. United Way advocates for favorable public policy that benefits those in need of health and human services. United Way has compassionate and knowledgeable volunteer leadership from individuals just like you!

- There are a range of studies that consistently demonstrate that there is a significant relationship between volunteering and good health, in addition to the social benefits brought about by volunteering. For example, a report by UnitedHealth Group, Doing Good is Good for You: 2013 Health and Volunteering Study, found that 76% of US adults who volunteer report that volunteering has made them feel physically healthier, and 78% report that volunteering lowers their levels of stress, leading to feeling better than adults who do not volunteer.

FAQ

- We are affiliates of United Way Worldwide and Indiana United Ways who fight for the health, education and financial stability of every person in every community. All monies donated in our community stay local unless the donor designates otherwise.
- United Way of St. Joseph County (UWSJC) allows donors to designate part or all of their United Way pledge to a partner agency, United Way Impact Area, or another United Way. UWSJC is then responsible for the processing, reporting, management and payment of said designations. UWSJC creates and sends reports for donor acknowledgement that includes donor and pledge information, unless the donor wishes to remain anonymous. UWSJC processes quarterly payments with corresponding payment remittance to each designated agency. UWSJC also incurs the fundraising costs of sales and marketing for these pledges. Like all United Ways, UWSJC prescribes to a consistent, fair and understandable methodology for calculating and recovering fundraising, processing, and management and general expenses on designated donations.
- UWSJC calculates fees based on the prior 3-year IRS Form 990. For the most recent campaign year our management and general percentage is 7.9% and our Fundraising percentage is 8.5%. A total fee of 16.4% is deducted from all designated pledges. A minimum pledge of \$50.00 is required if a donor wishes to designate because of the additional tasks listed above that must be performed and the fee that will be taken from each designation. It should also be noted that designations are over and above which a partner agency receives through the Allocations process and at this time designations are independent of Allocations.
- Our CEO does not fly a personal jet. We do not encourage commenting on the inaccurate social media posts that float around this time of year regarding CEO pay. We do encourage watching this video by Dan Pallota (https://www.ted.com/talks/dan_pallotta_the_way_we_think_about_charity_is_dead_wrong?language=en)
- New and increased donations are typically matched by the Lilly Endowment (not Lilly Foundation).

START WITH WHY

- What is your “why?”
- Mission Moment Story

“People don't buy what you do; they buy why you do it. And what you do simply proves what you believe.” — Simon Sinek, *Start with Why: How Great Leaders Inspire Everyone to Take Action*

COMMITTEE OVERVIEW

United Way Resource Development Committee Member Roles

United Way of St. Joseph County’s Resource Development Committee (previously Campaign Cabinet) is a volunteer opportunity for leaders in the community. The role of members is to raise awareness of the incredible impact United Way is having in our community and to invite current and potential donors to invest in the work. The committee represents United Way by contacting business and personal associates, friends, professional network, etc. about United Way to help build or strengthen a relationship. Members could also be asked to speak at strategic speaking engagement opportunities, presentations, meetings or other community events.

Responsibilities

- Effectively communicate United Way’s vision and mission.
- Be able to answer general questions about United Way should UWSJC staff not be present.
- Effectively communicate how your involvement in the community directly aligns to the work of United Way.
- Accompany United Way staff on Leadership, Executive level, and/or Employee presentations.
- Inspire the audience to invest in United Way by sharing compelling stories that elevate the impact and relevance of our work. - Invite others to join you in support of United Way.
- Thank current and potential donors for their time, consideration and commitment to community.

DATA/PHILANTHROPIC POTENTIAL

- 2017 – \$2,138 average total households' cash or cash equivalent (credit card, stocks, etc.)
- 103,069 HHs St. Joseph County
- \$220,361,522 was given by St. Joseph County HHs in 2017
- Giving USA categorizes "United Way, Jewish United Fund, and any other federated fundraising and fund distribution organizations under "Public Society Benefit." So public society benefit organizations are 7% of the giving, which means our market opportunity is \$15,427,493.
- 7% of philanthropic dollars giving in St. Joseph County in 2017 is \$15,427,493
- **UWSJC Philanthropic Potential = \$15,427,493**

UWSJC has had less to give back to our community because donor trends are down both locally and regionally, and our community partners and agency programs need more than ever to tackle poverty.

It also leaves less room for social innovation. Many of you who have served on the allocations committee have had to make tough decisions. The good news is that giving is at an all-time high, and we have the potential to do more. The following information outlines some of the matching opportunities we have access to through the Lily Endowment.



We Help Your Generous Dollars Expand Further

Thanks to Lilly Endowment Inc. (LEI), we are able to leverage \$328,000 back to St. Joseph County! Many new or increased gifts to United Way of St. Joseph County may qualify for a LEI match!

Corporate Match

- New workplace campaign*
- New or increased corporate gifts*
- Increased participation of 5%*
- New or Increased giving and signed Corporate Partnership Agreements 2:1 (min. \$1000)*

Individual Match

- New individual gifts of \$100 or more
- Increased gifts
- Coquillard Step Up Program
- Tocqueville Step Up Program

**up to \$15,000 per company.*

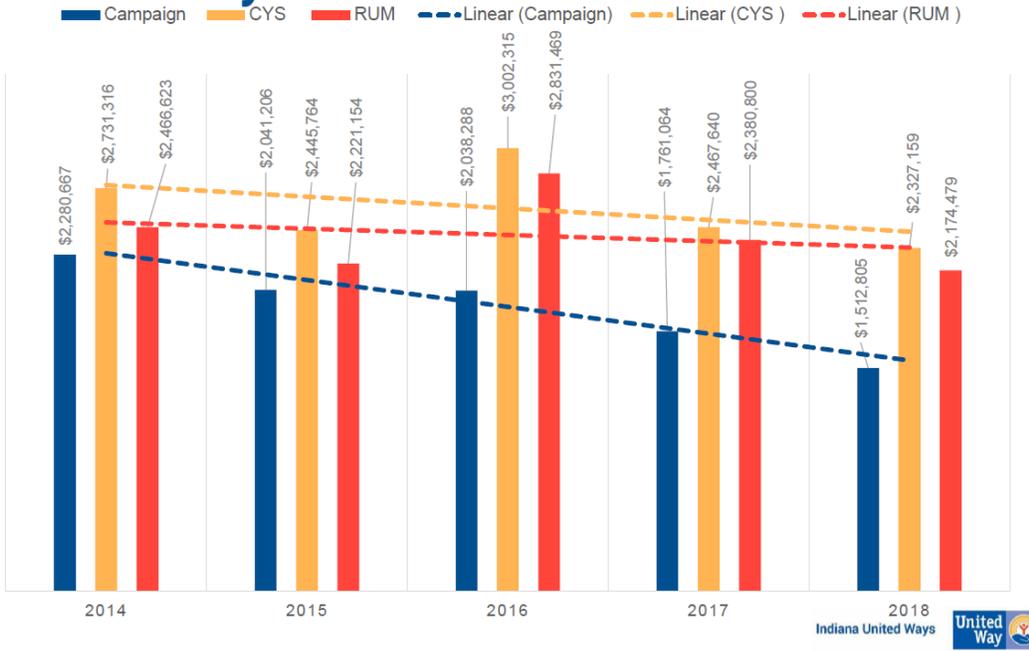
United Way of St. Joseph County
www.uwsjc.org



UNITED WAY TRENDS

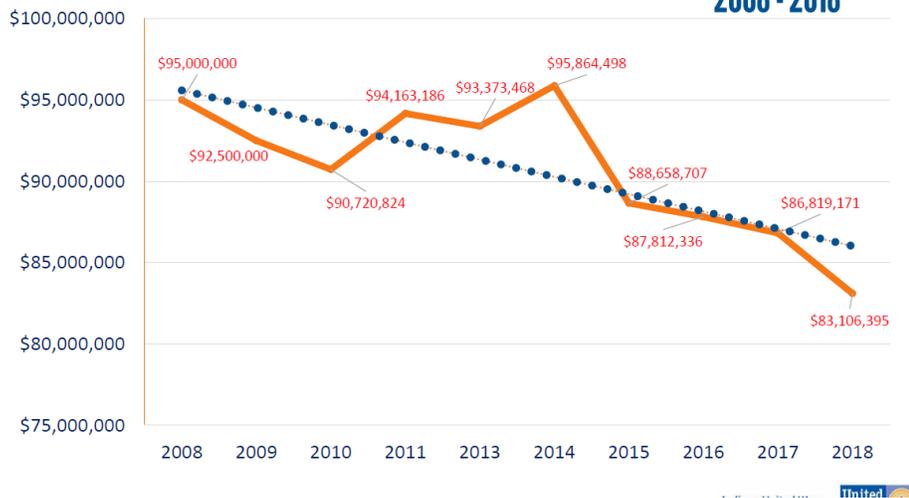
Local

St Joe County

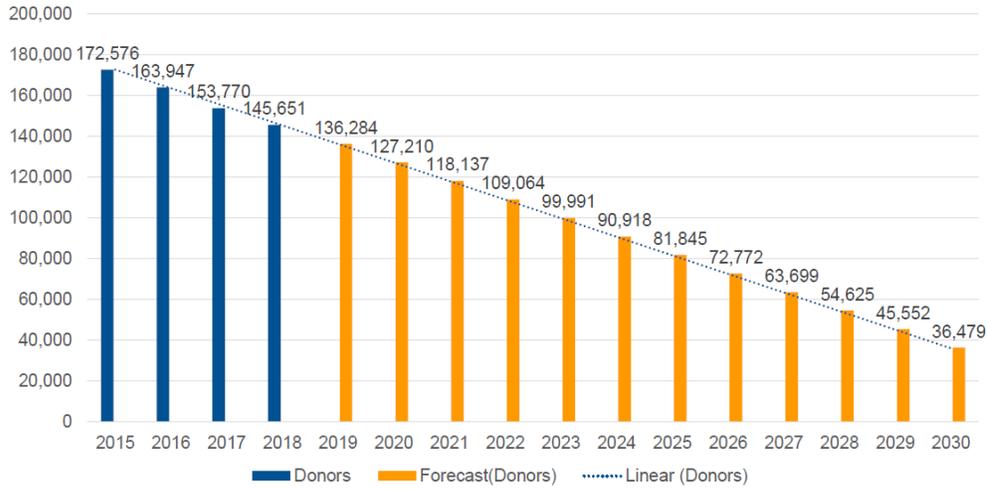


Indiana Campaigns

Indiana Campaign Trends 2008 - 2018



Donor Trend Projection for Indiana



**UNITED WE FIGHT.
UNITED WE WIN.**
LIVE UNITED

Our Current Reality United Way Donor Trends



Assuming our donor base continues to change at the same pace as over the last 3 years (2014-2017), the total number of donors will decline from ~6.4 million in 2017 to ~1.4 million by 2030



YOUR STORY

Sample “Elevator Pitch”

- United Way brings together people and resources to tackle our community’s most significant challenges. This is important because no one person or organization can fight these issues alone but together we can create lasting change. When everyone has a quality education, good health and the financial security to be able to support themselves, individuals thrive and our community thrives. At United Way, we impact the most people, in the most ways, for the most good in our community. We need you to give, raise your voice and volunteer your time because your involvement is our most powerful resource.

Start out by developing (and practicing) your story. Share your story with a friend or family member.

The more you practice, the easier telling your story can be! The most important thing we can say when we’re speaking about United Way is THANK YOU! It takes all of us working together to create lasting change in our community. We can’t do it alone. So, once you’ve shared your story, be sure to share your gratitude. This is what it means to LIVE UNITED!

Using the elevator pitch.

- This is a living document/statement. This pitch will change and grow.
- Stick to the core messages, but don’t feel you have to recite it. Most often you will use the elevator pitch in informal situations where you’ll need to put it in your own words.
- Allow for interruptions and questions and feedback. This is a conversation. The main points you absolutely need to hit are “the why,” “the what,” the “what’s more” and the “who?”
 - The Why: United Way brings together people and resources to tackle our community’s most significant challenges and improve lives. No one individual or organization can fight these issues alone but together we can make lasting change.
 - The What: United Way of St. Joseph County mobilizes the community to collectively reduce poverty. We envision moving people from a life of poverty to possibility.
 - When everyone has a quality education, good health and the financial security to be able to support themselves, individuals thrive and our community thrives.
 - The What’s More: At United Way, we impact the most people, in the most ways, for the most good in our community.
 - The Who: You! We need you to give, advocate and volunteer because our most powerful resource is your involvement.
- Customize this pitch by emphasizing the points that are most important to your audience.

Developing YOUR Personal United Way Story

Storytelling is one of the best ways to share your personal connection to the mission and vision of United Way.

Meaningful stories – about individuals and families who receive vital services through United Way and our partner agencies, and volunteers who improve our community by sharing time and talents – are key ways to illustrate to your audience what it means to Live United.

What makes a good UW story?

- Your story does not have to be long or complex. A good story is simple, concrete, and credible and shows emotion. Start with the end in mind and work backwards.
- What shift do you want to see in your audience?
- What three points do you want them to remember?
- What action do you want them to take after they hear your story?
- Think of analogy, like “What is United Way like?” (Example: The State Farm insurance agency does it best, “like a good neighbor, State Farm is there.”)

The best stories are told by people who are excited and knowledgeable about the subject matter – people just like you! This template may help you think through and develop your story if you feel stuck.

- Think of a time when you or someone you know made a difference. Introduce yourself and your role in the story.

- Who else was involved?

- What happened (The beginning, middle and end...)? What challenges arose along the way? What changed by the end of the story?

- What is United Way’s role in the story?

- How does your story relate to United Way’s priorities and supporting strategies?

- Why does this story matter? To those involved? To our community? To you?

Making the Ask

Once you've informed your audience about United Way and shared your passion for the work, making the ask is easy. You are the connector – your job is facilitating the company or donors' ability to impact a community issue that they find compelling.

Some examples include:

- “I hope you'll join me in improving lives in our community and empowering people to achieve their full potential by getting involved with United Way.”
- “Your involvement with United Way strengthens our community by creating opportunities for every person to thrive through a better education, stronger financial independence, and healthier lives.”
- “If you have been involved in the past, I would ask you today to please continue your support. If you are thinking about getting involved for the first time, I hope that you've heard something today that inspired you!”
- “We would love to schedule a time to visit with you further, who would be the best person for me to follow up with?” or “Can I set up a meeting to introduce you to (Laura/Lauren, etc.)”
- We are hearing that companies want United Way's help on 1. Employee engagement 2. Brand Lift 3. Impact 4. Corporate Social Responsibility Strategy. “What are your thoughts?” “What else?”

PROCESS/HOW TO

- Call your connection/stop by.
- Share your pitch/story by phone or email, copy us if you chose or in a reply!
- Thank them and ask for a meeting or how United Way could help them at their workplace. This is a great time to loop United Way team/staff in.
- What are their business goals? How might United Way be able to help them or their staff?
- Find a contact who we can meet with about getting involved.
- Leave information (may include UWSJC Brochure, 2-1-1 Info, Family Wize Info, Lilly Match Info, Corporate Pledge Form. Corporate volunteer opportunities, etc.)
- Keep notes on your contacts and email to United Way team.

GAME PLAN & STRATEGY

- Leverage Your Existing Relationships to Make Connections for Strengthening Current UW Relationships
- Leverage Your Existing Relationships to Connect with Potential New Business Accounts
- Others
 - Connections You May Have
 - Business Friends who would be interested in hearing more about United Way, could their employees utilize some United Way resources or employee engagement/volunteerism?

Thank you!

NOTES
