

# Welcome to the 2024 Champion Training!



\*Before we get started, please make a nametag at your table. Please grab coffee and a pastry

August 8, 2024

7:30 - 9:30 AM

[www.unitedwayfoxcities.org](http://www.unitedwayfoxcities.org)

# Housekeeping



01

Please grab some coffee and bagels

02

Restrooms are right outside the  
conference room

03

Please ask questions at any time

# Today's Agenda

- Introductions
- Why United Way?
- Campaign Planning
- Tools
- Year-round Engagement
- Upcoming Events
- Questions
- Group Photo

# You are a Champion!



## Introduce yourself to the person sitting next to you

- Your Name
- Where You Work
- Your Role/Position
- Why are you a Champion?



Copyright ©



# Our Promise

Our mission is clear

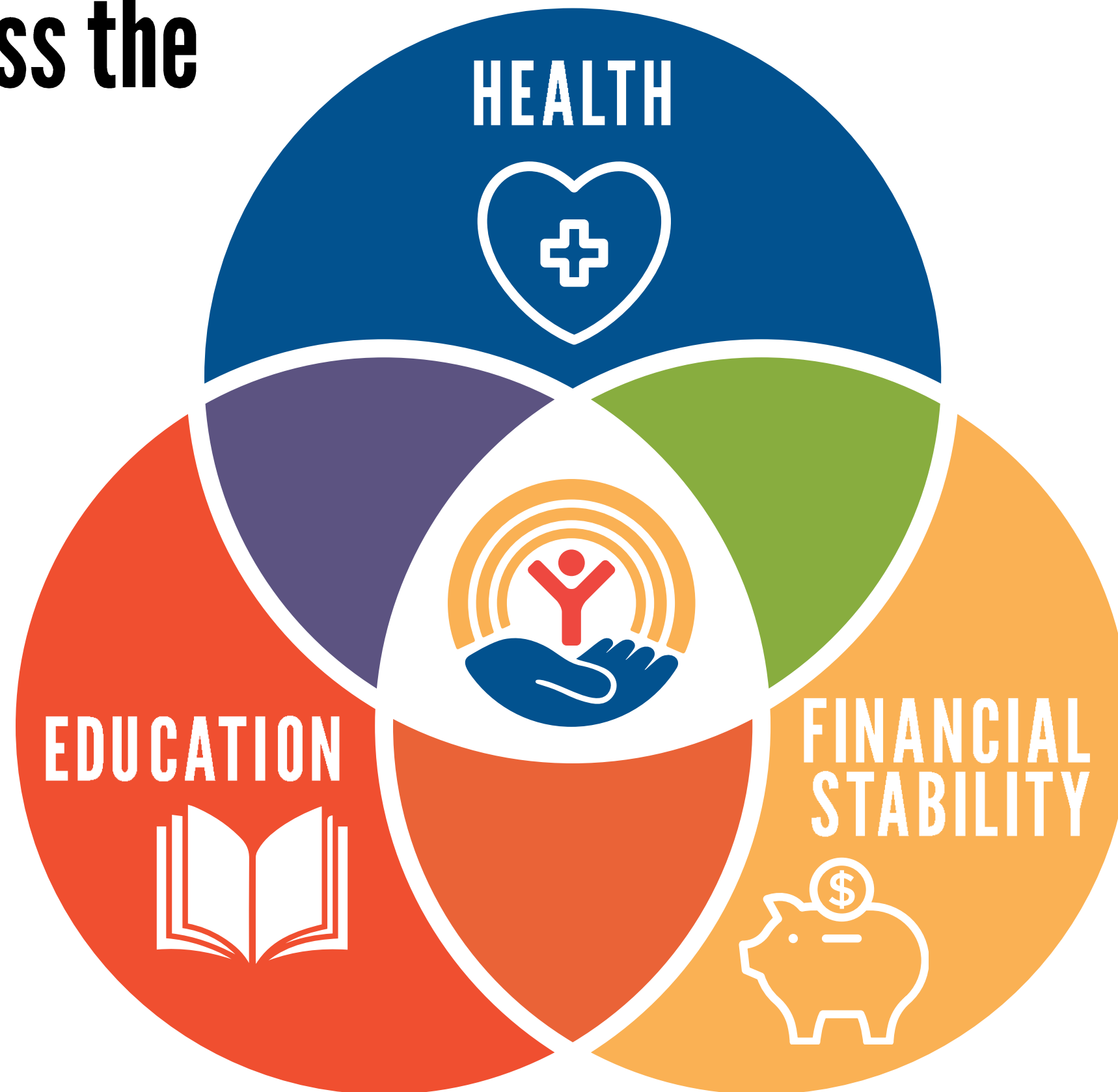
United Way **mobilizes communities to action** so all can thrive.

And, we have a powerful vision

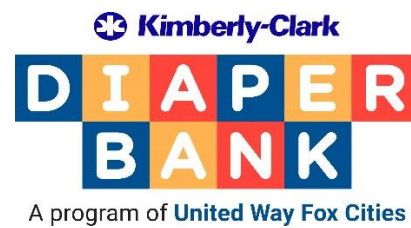
A world in which **every person** in **every community** is thriving.



United Way has a **high-level view** of our community,  
which allows us to address the  
**interconnectedness**  
of complex social issues.









# United Way's work is based on real-time data and research that identifies the most critical community issues.

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# Who is ALICE?

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ALICE: Asset Limited, Income Constrained, Employed

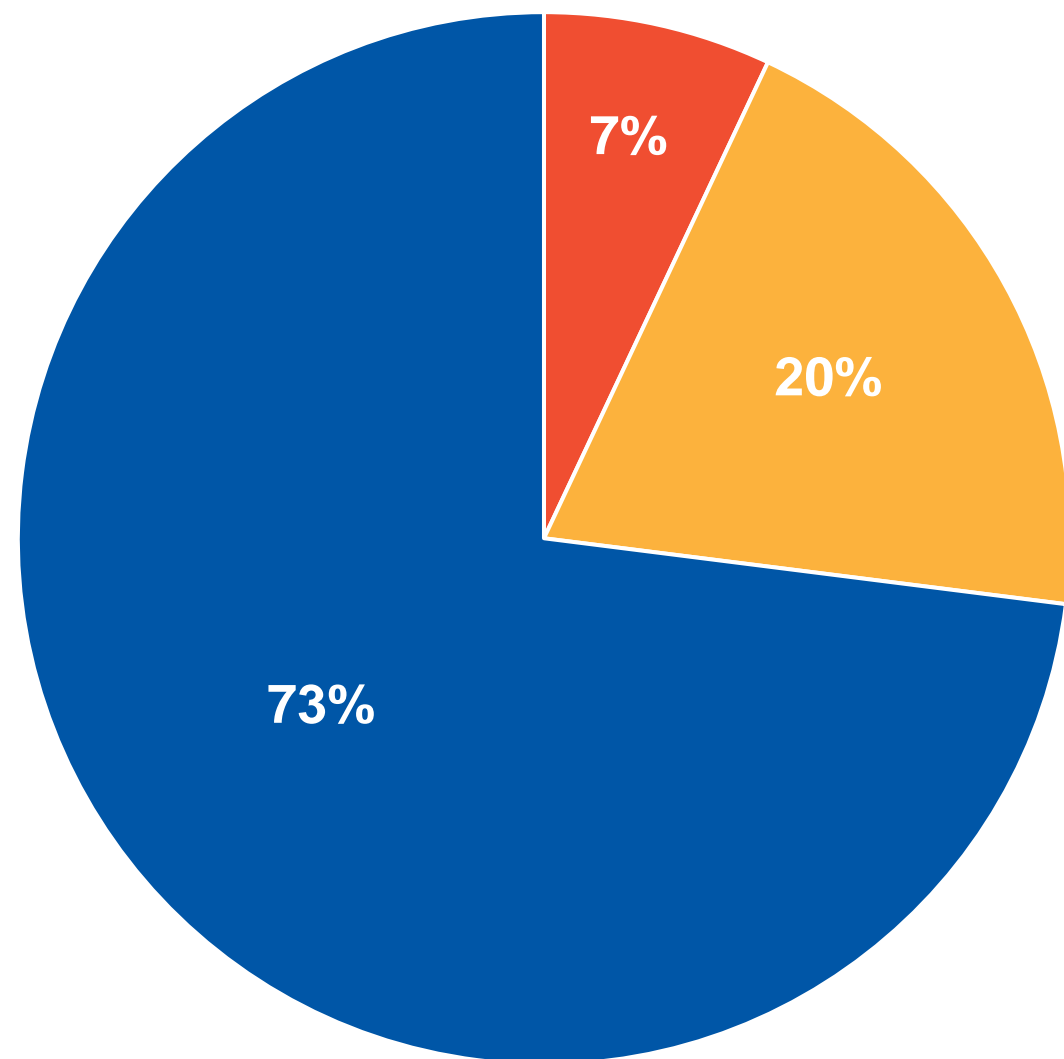




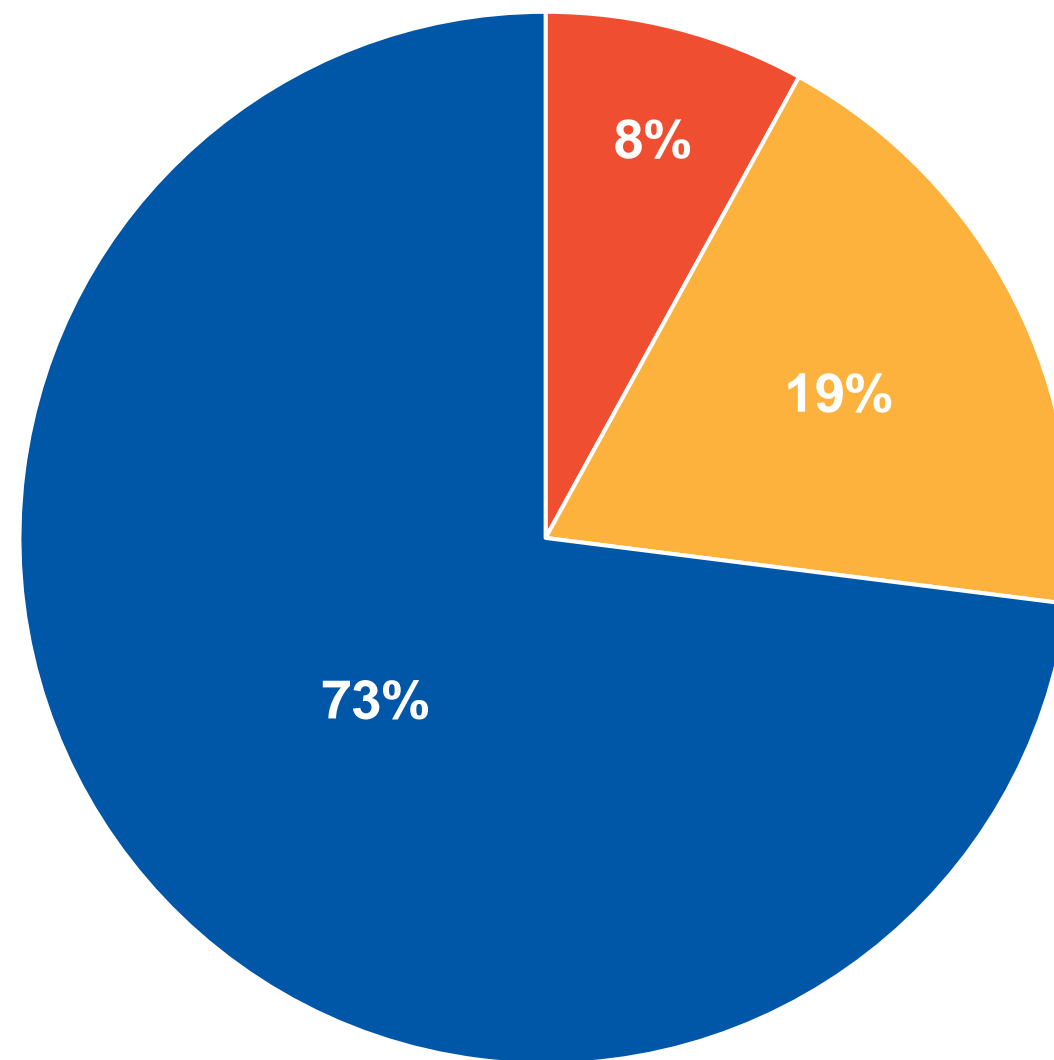
# ALICE IN THE FOX CITIES



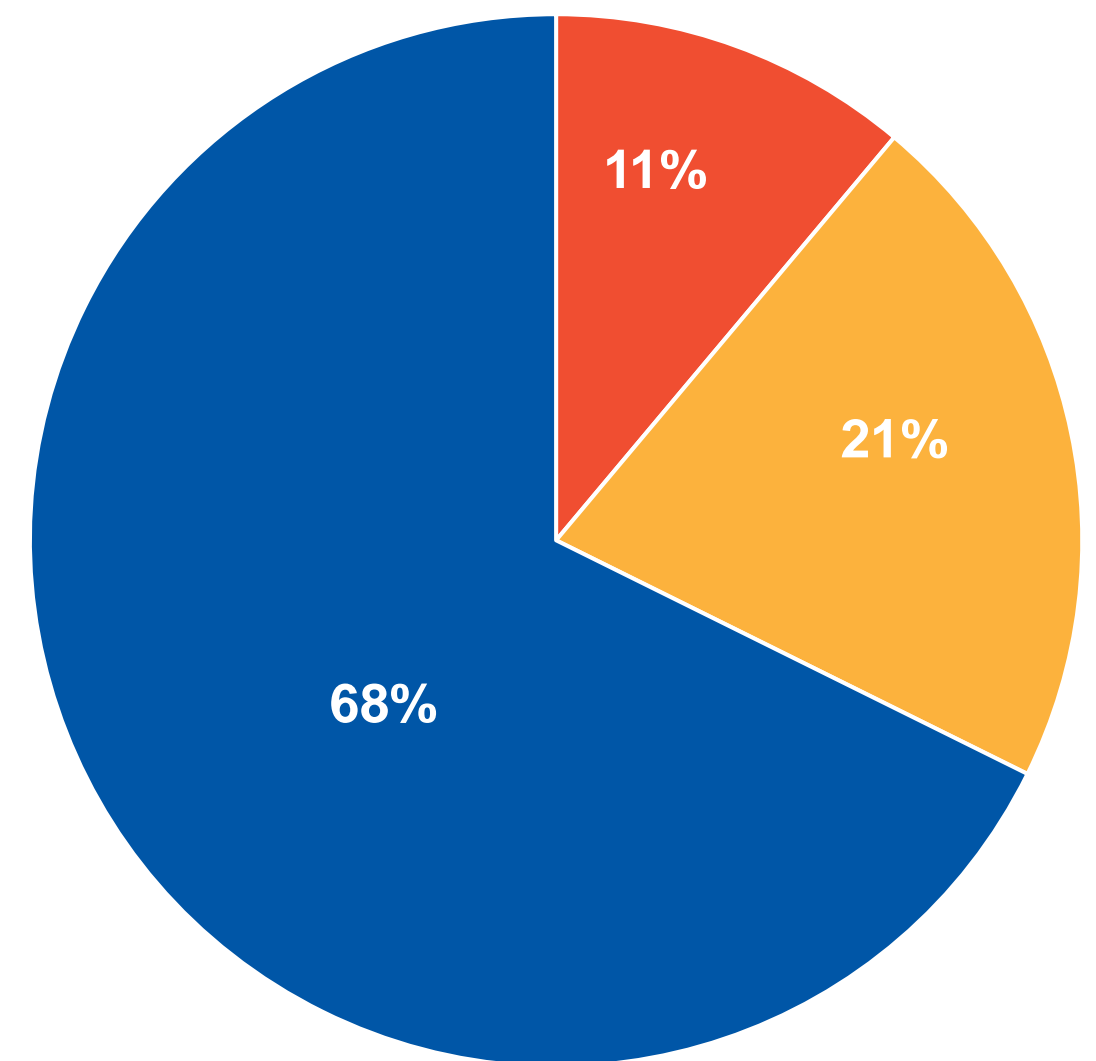
Calumet County



Outagamie County



Winnebago County





# In Wisconsin, Help is Only 3 Numbers Away



United Way Fox Cities





LIVE UNITED<sup>®</sup>

# Strength Based Messaging

**Impact**



**Relevance**



**Sustainability**



In a rapidly changing world, **United Way needs to transform and revitalize our Network as an impactful, relevant, and sustainable resource for the communities** we serve.





# Brand Personality



## Engaging

Personal  
Purposeful  
Accessible

- Real, relatable, and purposeful
- Use active voice and plain language
- Short blocks of text
- Add personal stories and/or talk about human impacts
- Don't be too data or stat heavy - make the numbers memorable. Less can be more

## Energizing

Inspiring  
Mobilizing  
Activating

- Inspire and rally toward action
- Focus early on the big 'why' and what we are working toward
- Make people the drivers of the change, not the programs (i.e., "communities raised \$XX" rather than "the program raised \$XX")

## Elevating

Hopeful  
Emboldening  
Amplifying

- Show how we seek to strengthen every community, so all can rise.
- Define communities by what they're working toward, rather than what they lack or need
- Start with the project goals, then define barriers and needs
- When possible, connect positive outcomes to the bigger picture and ways to support



A red heart-shaped hot air balloon is floating in the sky above a rugged mountain range. The balloon is positioned on the left side of the frame, and the mountains are visible in the background under a blue sky with some clouds.

# Strength Based Messaging

Strength-based messaging emphasizes the strengths, opportunities and power of an individual, group or community. It represents people positively, in a way that feels true and empowering to them. Instead of focusing on the negatives of a community or a population, strength-based messaging seeks to uplift the positive and move away from language that can be stigmatizing or objectifying to the communities, populations and clients we serve.

~ Prosper Strategies



# Strength-Based Continuum



## Stereotype

Exploits or over-generalizes the condition of a group that experiences disadvantages, typically in order to generate sympathy or support for a cause

## Need

Emphasizes the needs and challenges of an individual, group or community.


## Strength

Emphasizes the strengths, opportunities and power of an individual, group or community. It represents people positively, in a way that feels true and empowering to them






# Sample Strength Based Reframe...



Without a positive influence in their lives, and mentorship, it is so easy for kids to make poor decisions and get on the wrong path.



Mentors serve as a positive influence and play a powerful role in helping youth navigate challenges and achieve their goals.

# Sample Reframes...

United Way changes systems and communities for the better.

*TAKING THE CREDIT*

Global warming is creating a climate emergency. The clock is ticking, and we need to act before it's too late.

*ALARMIST*

We're on the ground, helping communities build capacity.

*JARGONY*

*SHOWS THERE'S A PLACE FOR EVERYONE!*

Together, we're protecting people and places from natural disasters, so we can all thrive for generations to come.

*FUTURE FOCUSED*

When we take action together, we can create change for all.

Together, we're helping communities grow stronger.

*APPROACHABLE*



# Making the Shift...

Your gift helps people in need create a better life.

Families below the ALICE threshold are stuck, and will stay there without your support.

Test scores are low because kids in our community don't have access to basic needs.

Volunteers spend over 1,200 hours reviewing programs and making funding decisions to ensure your donations are invested wisely.

Your gift empowers individuals and families to thrive.

With your support, families below the ALICE threshold can build a path to long-term financial security.

Your support can help equip kids in our community with more tools to succeed in school and life.

United Way walks alongside nonprofits that are positioned to address the true needs of our community.



# Thriving United Way Framework



Focus Areas



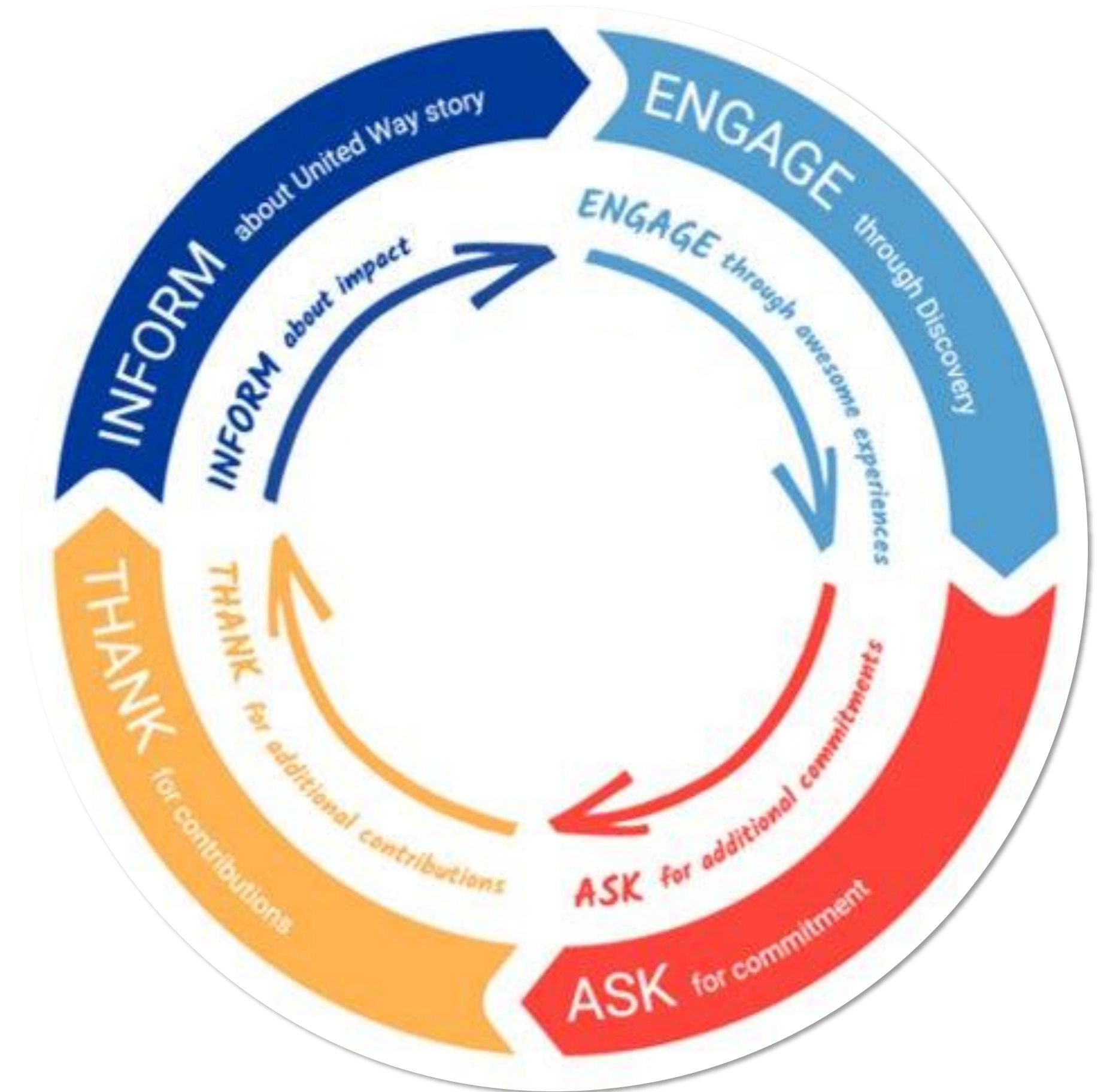
Success Factors



COMMUNITY LEADERSHIP	EQUITABLE COMMUNITY IMPACT	BRAND STRENGTH, AWARENESS & RELEVANCE	DIVERSIFIED REVENUE STREAMS	STRONG ORGANIZATIONAL FOUNDATION	NETWORK CITIZENSHIP
Listen to and Engage with the Community in Creating Solutions and Shared Ownership	Establish Measurable Impact Strategies that Reflect Community Needs and Drive Equitable Outcomes	Leverage United Way Brand Assets to Build a Strong Reputation Across Local Audiences and Channels	Engage Staff and Volunteers in Fundraising Strategies	Establish and Maintain Strong Financial Standards and Data-Informed Operational Efficiency	Follow United Way Worldwide Membership Accountability Practices and Procedures
Drive and Participate in Multi-sector Community Collaboration to Solve Local Challenges	Utilize Community and Corporate Volunteers to Enhance and Expand Scope of Impact Work	Communicate Impact Results to Demonstrate United Way's Role and Value, and Drive Local Engagement	Implement Year-Round Donor Engagement and Sustainable Fundraising Best Practices for Individual and Corporate Donors	Ensure an Effective and Sustainable Governance Model	Actively Contribute to Network, Local/Regional Collaborations and Offerings
Build Local Reputation Through Partnerships that Leverage United Way Expertise	Advocate for Public Policy that Advances Impact Priorities	Engage the Community Through Consistent and Proactive Marketing and Communications	Activate Diverse, Sustainable Revenue Streams	Board and Staff to Drive United Way Performance Using Relevant Resources and Technology	Strive to Partner and Collaborate with Other United Ways Across the Network
Lead with a Growth Mindset, Inspire Innovation, and Monitor Emerging Trends	Ensure Representation in all Work Related to Inclusion, Diversity, Equity, and Access (IDEA)	Understand the Public Sector, Philanthropic, and Social Landscapes to Leverage Trends and Opportunities	Leverage Community Impact Success to Amplify Diverse Fundraising Efforts	Build an Equitable, Agile and Forward-Thinking Culture	Engage with Global United Way Network to Create a Culture of Trust



# Campaign Planning



# Things to Consider

How can you align your campaign and your messaging with your workplace's mission, vision, and values.

How are you going to run your campaign? Are you going to use paper pledge forms, one of our digital giving options, or something else?

What's your timing and your campaign timeline? What works best for your workplace considering everything else you have going on?

How are you going to educate others?

How can you engage the leadership at your workplace?

What are realistic goals for your workplace? Consider what is realistic based on last year and your current state.

How are you going to kickoff your campaign?

We're here to help!



# Presentation Menu of Options



## Tier 1 (10 minutes)

- United Way Video
- Why United Way?
- The Importance of 2-1-1
- Vehicle Sweepstakes
- Key Take-Away Review
- Closing Activity/SWAG Give-away

## Tier 2 (20 minutes)

- Word Cloud/Poll Activity
- United Way Video
- “Did You Know” Data Talk OR Two Truths, One Lie Activity
- Why United Way?
- The Importance of 2-1-1
- Vehicle Sweepstakes
- Key Take-Away Review
- Closing Activity/SWAG Give-away

## Tier 3 (30+ minutes)

- Online Poll
- United Way Video
- “Making Ends Meet” Alice Experience
- Why United Way?
- The Importance of 2-1-1
- Vehicle Sweepstakes
- Key Take-Away Review
- Closing Activity/SWAG Give-away

## Optional Add-ons:

- “Did You Know” Data Talk
- Two Truths, One Lie Activity

## No A/V (10 - 15 minutes)

- Verbal Poll
- “Did You Know” Data Talk OR Two Truths, One Lie Activity
- Why United Way?
- The Importance of 2-1-1
- Key Take-Away Review
- Closing Activity/SWAG Give-away



# Your United Way Team



**Jen Rottier**

Associate Director of Resource Development



**Kyle Brauer**

CRM Coordinator



**Meghan Sherwood**

Associate Director of Community Engagement



**Alicia Frank**

Associate Director of Resource Development



**Amanda Vander Logt**

Resource Development Coordinator



**Josh Lambrecht**

Director of Resource Development



**Renae Verstegen**

Resource Development Specialist

# We want to hear from you!



- 1 Take a few minutes to write your thoughts and ideas for this year for the following categories. Use something that worked well in the past, or think of what you could do for this category this year:
  - Preparing for your campaign
  - Making your campaign engaging
  - Motivating others to join you
  - Making the ask
  - Thanking those who participated
  - Questions you might have
- 2 Share your thoughts with a person sitting next to you
- 3 Place your post-it notes on the appropriate chart paper around the room



# Campaign Materials



**United Way** **United Way Fox Cities**  
1400 Wilshire Road  
Menasha, WI 54852  
920-954-2150

# PLEDGE FORM

**Scan QR code to learn more on how to get involved in your community.**

UnitedWayFoxCities.org      Suffix \_\_\_\_\_

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## 1 Your Information

First Name \_\_\_\_\_ Middle Initial \_\_\_\_\_ Last Name \_\_\_\_\_ Personal E-mail \_\_\_\_\_ Preferred Phone \_\_\_\_\_  
☐ I prefer to be anonymous. Work E-mail \_\_\_\_\_  
 Birthdate \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_ (for sweepstakes, LINC, and Emerging Leaders eligibility)  
 Home Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_  
 Preferred Phone \_\_\_\_\_ Cell \_\_\_\_\_ Home \_\_\_\_\_  
 Employer Name \_\_\_\_\_ Work Phone \_\_\_\_\_  
☐ New employer in the last year

**Preferred Method of Contact:** ☐ Work E-mail ☐ Personal E-mail ☐ Preferred Phone  
 By checking a box above, you consent to be contacted via that method. If you wish to opt out or change your preferred method of contact at any time, you can do so by contacting [unsubscribe@unitedwayfoxcities.org](mailto:unsubscribe@unitedwayfoxcities.org). By opting out, you acknowledge that you may not receive communication via your preferred method but may still be contacted through alternative means.

All information is kept confidential and is used only by United Way Fox Cities. We do not sell or share our list of contributors with other organizations.  
 We do not provide goods or services in whole or in part consideration for any contribution made to the organization via this pledge form.  
 Read our complete privacy and designation policies online at [UnitedWayFoxCities.org](http://UnitedWayFoxCities.org).

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## 2 Your Gift Payment Options

☐ **PAYROLL DEDUCTION**  
 Number of pay periods \_\_\_\_\_  
☐ I want to contribute the following amount per pay period:  
☐ \$100 ☐ \$75 ☐ \$50 ☐ \$25 ☐ \$10 ☐ Other \$ \_\_\_\_\_

☐ **Credit Card**  
 Amount \$ \_\_\_\_\_  
 Your credit card may be processed after your next debit bill. To ensure your credit will be processed, please allow 3-5 business days for processing.  
 Card # \_\_\_\_\_ Expiration date: \_\_\_\_/\_\_\_\_/\_\_\_\_ Security Code: \_\_\_\_  
☐ Visa ☐ Discover ☐ MasterCard ☐ American Express  
 Account # \_\_\_\_\_

☐ **BILL ME**  
 Amount \$ \_\_\_\_\_ (\$50 Minimum)  
☐ One-time gift to be billed on \_\_\_\_/\_\_\_\_/\_\_\_\_  
☐ Recurring Quarterly (1st of January, April, July, and October)

☐ **DIRECT GIFT**  
 (Cash, Check, and Credit Card Options)  
☐ Cash  
 Amount \$ \_\_\_\_\_  
☐ Check (Payable to United Way Fox Cities)  
 Check # \_\_\_\_\_  
 Amount \$ \_\_\_\_\_

☐ My gift can be combined with my spouse's / partner's gift to United Way Fox Cities.  
 Spouse/Partner Name: \_\_\_\_\_  
 Spouse/Partner Company: \_\_\_\_\_

**STOCKS, SECURITIES, OR AUTOMATED BILL PAYER**  
 Please contact United Way Fox Cities at 920-954-7210 to complete these payment options.  
**Optional Designation:** Please direct the following amounts from my total gift to the organization(s) listed below:  
 Note: Any funds not allocated to a specific organization will default to United Way Fox Cities.  
☐ Agency Named Below \$ \_\_\_\_\_ (\$50 min.)  
☐ Other United Way Name Named Below \$ \_\_\_\_\_ (\$50 min.)  
 Agency/Other United Way Name Naming Address: City, State, Zip Code \_\_\_\_\_

☐ I prefer to be anonymous. Do not release my/or name(s) to the designated agency(ies).

THANK YOU!

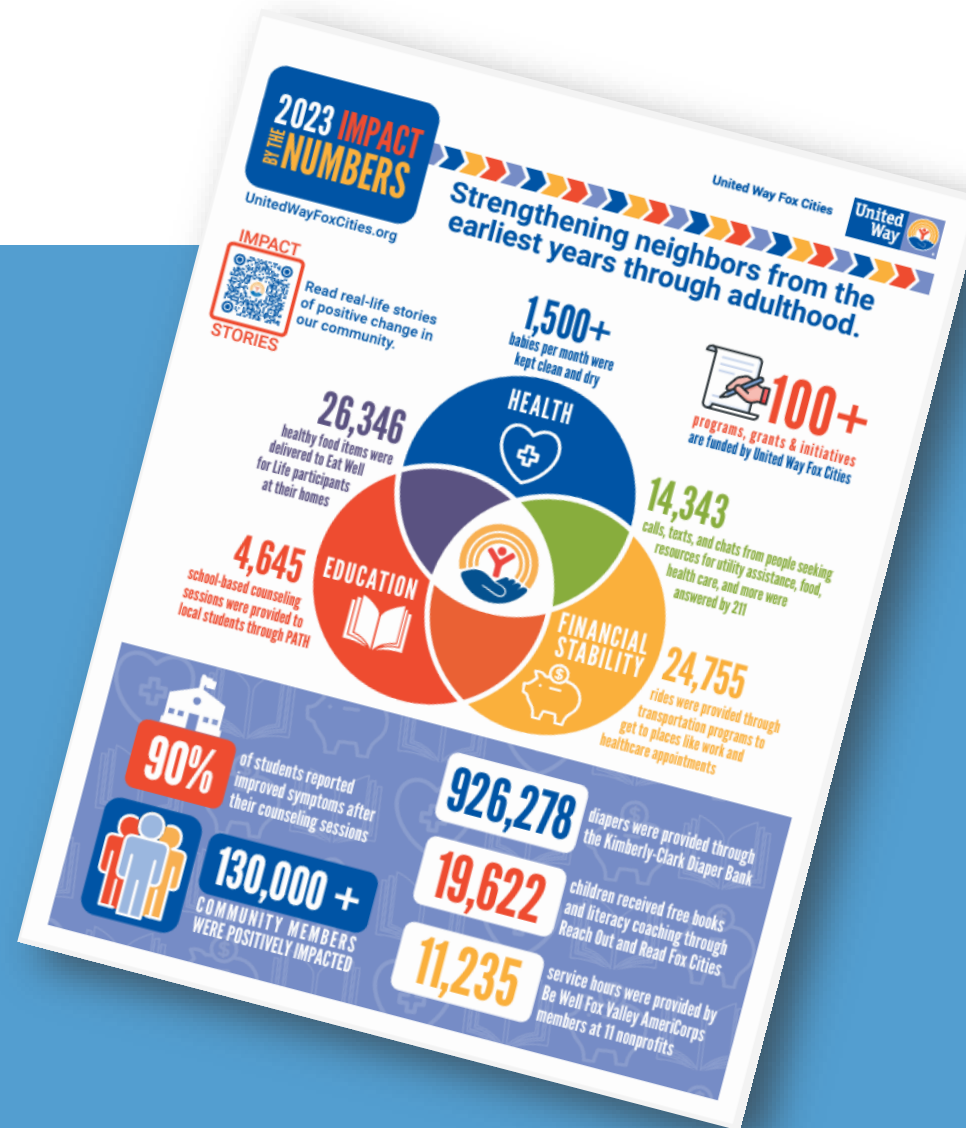
Your gift to United Way Fox Cities makes a difference in the lives of 1 in 3 people in our community.

Date: \_\_\_\_\_

**MY TOTAL GIFT**  
 \$ \_\_\_\_\_ Amount \_\_\_\_\_

Sign: \_\_\_\_\_

PLEASE MAKE A COPY FOR YOUR RECORDS.








# ENGAGE FOR CHANGE

Would you like to connect with like-minded leaders in the Fox Cities to create lasting change?

United Way Fox Cities' engagement groups offer you the opportunity to make a meaningful impact in your community with your time, talent, and treasure. Your giving level and age may qualify you for more than one engagement group.

## BENEFITS

- Make a difference in your local community! Your investment positively impacts one in three people in the Fox Cities.
- Deepen your understanding of community issues.
- Enhance your personal & professional networks.
- Access exclusive events & volunteer opportunities.
- Connect with industry & community leaders.

## YOU'RE INVITED TO GET INVOLVED.

**Choose your level of engagement.**

Members of engagement groups are invited to participate in opportunities for volunteering and learning about your community.

**Scan QR code below to find various ways to engage through LINC, Emerging Leaders, Leadership Giving, or Tocqueville Society.**



Open camera.  
Scan code.  
Learn more.

[bit.ly/getinvolvedUWFC](http://bit.ly/getinvolvedUWFC)



# WIN A 2024 FORD BRONCO SPORT!

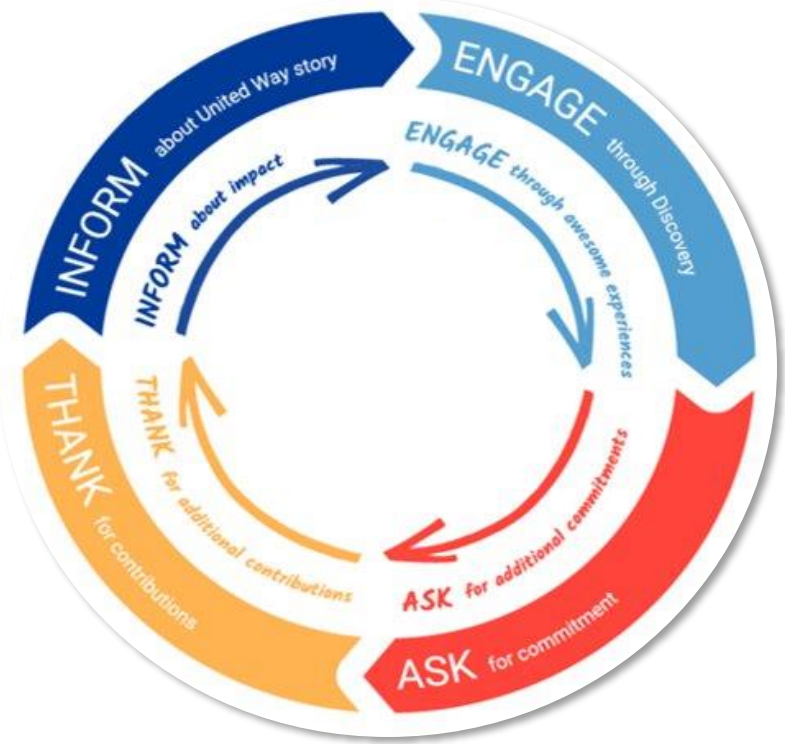
For full sweepstakes details and rules, visit [UnitedWayFoxCities.org](https://UnitedWayFoxCities.org).

Generously Donated by  
Bergstrom Automotive



# Year-Round Engagement

<div><div><div>United Way</div><div>United Way Fox Cities</div></div><div>YEAR-ROUND ENGAGEMENT CALENDAR</div></div>			
FALL	WINTER	SPRING	SUMMER
<div>SEPTEMBER</div> <div></div> <div>RAISE AWARENESS</div> <div>Diaper Need Awareness Week falls in September. Schedule a volunteer opportunity at the Kimberly-Clark Eastern Wisconsin Diaper Bank or host a diaper drive at your workplace.</div>	<div>DECEMBER</div> <div></div> <div>ENTER TO WIN</div> <div>December marks the last call to qualify for the sweepstakes vehicle! Remind your teammates of the upcoming deadline in December. Check <a href="https://UnitedWayFoxCities.org">UnitedWayFoxCities.org</a> for more details.</div>	<div>MARCH</div> <div></div> <div>CELEBRATE COMMUNITY</div> <div>Outstanding workplace campaigns receive awards for their support of the community. Whether you are celebrating others or yourselves, share the good work happening in our community through social media or word of mouth.</div>	<div>JUNE</div> <div></div> <div>GATHER FOR GOOD</div> <div>Launch campaign season by attending United Way Fox Cities' Campaign Kickoff and learn about your United Way and how it supports your community.</div>
<div>OCTOBER</div> <div></div> <div>ENGAGE UP-AND-COMING LEADERS</div> <div>Host an in-person information session about your campaign. United Way Fox Cities' Resource Development staff would be happy to join you.</div>	<div>JANUARY</div> <div></div> <div>SAY THANK YOU</div> <div>Find pertinent ways to thank your teammates for engaging in this year's United Way campaign.</div>	<div>APRIL</div> <div></div> <div>ENCOURAGE VOLUNTEERISM</div> <div>April is National Volunteer Month. Encourage your teammates to explore their passions at United Way Fox Cities and throughout the community.</div>	<div>JULY</div> <div></div> <div>PLAN AHEAD</div> <div>It's a great time to start planning for your next campaign. Recruit others to join the effort with you.</div>
<div>NOVEMBER</div> <div></div> <div>HIGHLIGHT GIVING TUESDAY</div> <div>Encourage your teammates to join the movement of radical generosity by promoting Giving Tuesday, held on the Tuesday following Thanksgiving.</div>	<div>FEBRUARY</div> <div><div>211</div></div> <div>SHARE THREE IMPORTANT NUMBERS</div> <div>February 11 is National 211 Day. Share social media content from United Way Fox Cities to inform your teammates about this community resource.</div>	<div>MAY</div> <div></div> <div>BREAK THE STIGMA</div> <div>May is Mental Health Awareness Month. Promote all the mental health resources available in our community.</div>	<div>AUGUST</div> <div></div> <div>JOIN THE FUN</div> <div>Launch campaign season by working with your teammates to develop fun and engaging activities promoting your organization's kickoff.</div>



United Way Fox Cities



# Upcoming Events



## United Way Empower Hour

Thursday, September 19

8:00 - 9:30 a.m.

Catalpa Health Community Room

## Champion Gratitude Event

Thursday, January 16

7:30 - 9:30 a.m.

ACOCA Coffee



# Stay Connected

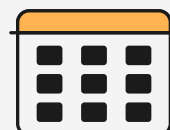
01

**Follow United Way Fox Cities on our Social Pages**



02

**Check out our Upcoming Events page**



03

**Connect with your United Way contact to help plan your campaign**





**Find Us. Learn More. Get Involved.**



**[bit.ly/UWFCFacebook](https://bit.ly/UWFCFacebook)**

**[bit.ly/UWFCLinkedIn](https://bit.ly/UWFCLinkedIn)**



**[bit.ly/UWFCInstagram](https://bit.ly/UWFCInstagram)**

**[bit.ly/UWFCYouTube](https://bit.ly/UWFCYouTube)**



**UnitedWayFoxCities.org**  
**GIVE. ADVOCATE. VOLUNTEER.**



**Questions?**





Please  
complete our  
short survey!



**THANK YOU!**



Email us at  
[ResourceDevelopment@UnitedWayFoxCities.org](mailto:ResourceDevelopment@UnitedWayFoxCities.org)  
if you have more questions.