United Way Worldwide
CFO Updates
Corporate Relations Operating Group (CROG)

February 2017
## Corporate Relationships - Level Setting

Corporate Relationships are a major asset that need to be strengthened and not taken for granted

<table>
<thead>
<tr>
<th>Assets &amp; Opportunities</th>
<th>Challenges</th>
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<tbody>
<tr>
<td>• Unparalleled geographic coverage, and organizational scale</td>
<td>• US donors lost in past 2 year - 9.3MM to 8.3MM</td>
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<td>• Importance of the workplace channel; opportunity to engage 45M employees with our work</td>
<td>• 39% of US donors lost in past 10 years</td>
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<td>• Opportunity to align CSR and UW impact, as part of a business value for corporate partners</td>
<td>• 18% participation rate</td>
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<td>• Loyal contributors and the ability to realize their giving potential</td>
<td>• 26,000 campaigns lost in past five years (16% reduction)</td>
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<td></td>
<td>• $100MM + is the estimated effect of the “Baby Boomer Bubble” and impending exodus from workplace loyal donors</td>
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Cross-Market Corporate Relationship Management: Case Statement– Why do this?

• Donor is the customer
• Customers have spoken: want coordinated national/global relationships and delivery
• Actions speak louder than words: Customers are leaving us
• Only as strong as our “weakest link”
• We have no more time; must act now!
• Strong execution provides opportunity for growth
CROG & DSOG

Delivering benefits to the customer – individual donors and corporate partners

Digital Services Operating Group

*Improve the Individual Experience*
- Shared content
- Shared digital platforms
- Shared team

Corporate Relations Operating Group

*Improve the Company Experience*
- Account management
- Employee engagement
- CSR/impact alignment
- Brand Lift

Employees
## Corporate Relations Operating Group (CROG) Make-Up

### United Way Team
1. Greater Twin Cities United Way
2. Mile High United Way
3. United Way of Central Carolinas, Inc.
4. United Way of Central Indiana
5. United Way of Greater Atlanta
6. United Way of Greater Cincinnati
7. United Way of Greater Los Angeles
8. United Way of Greater Milwaukee & Waukesha County
9. United Way of Massachusetts Bay and Merrimack Valley
10. United Way of Metropolitan Chicago
11. United Way of New York City
12. United Way of the Bay Area
13. United Way Worldwide

### Additional Market Involvement
1. Miami (BAC)
2. Dallas (BAC)
3. Louisville (UPS)
4. San Diego (US Bank)
5. Orange County (US Bank)
6. Portland, OR (US Bank)
7. Bridgeport (GE)
8. Phoenix (Macy’s)
9. Las Vegas (Anthem)
10. Richmond (Anthem)
11. Seattle (Wells Fargo)

### Company Focus
1. Anthem
2. Bank of America
3. Deloitte
4. GE
5. Macy’s
6. PwC
7. Target
8. UPS
9. US Bank
10. Wells Fargo
CROG Company Criteria:

- Significant company size, $$, RUM, or donors
- Geographic spread of markets
- Headquarter willingness or other inner circle markets willing to take on leadership role
- At risk or big opportunity
- Ability for our efforts to create a positive change
Scope

Charge:
• Understand what companies care about/need through voice of the customer
• Create solutions to deliver business value
• Work together as One Network to manage company relationships with a coordinated approach

Focus on:
• Strategic, Coordinated, and Enhanced Relationship Management
• Employee Engagement
• CSR Alignment & Delivery
• Building Reputational Lift and better donor communications

To deliver/execute, local United Way markets need:
• Centralized Global Account Management Capability, structure and shared accountability across geographic boundaries
• Shared goals/metrics with companies through influencer conversation and understanding value proposition
• LUW and individual motivations to think and act globally
• Increased Training (August 2016 and March 2017)
• Real-time communications through use of technology
## UW Behaviors-- Implementing CROG Practices

<table>
<thead>
<tr>
<th>Before</th>
<th>After</th>
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<tr>
<td>• UWW communication around problems or tactics like campaign dates &amp; reporting</td>
<td>• UWW communication around opportunities and strategies for growing relationship</td>
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<td>• Communication with other UWs regarding reports</td>
<td>• Communication with other UWs about their relationship with USB, successful strategies and challenges/opportunities</td>
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<td>• Local goals, planning and execution without understanding full national picture</td>
<td>• Strategic conversations with national foundation/community relations staff informed by UW market needs and input</td>
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<tr>
<td>• Strategic conversations about Twin Cities campaign and employee engagement with a local community relations manager</td>
<td>• Local goals, planning, execution and strategic conversations informed by national vision</td>
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<td>• Top-to-Top executive/key influencer meetings about Twin Cities, and maybe UWW</td>
<td>• Top-to-Top meetings on behalf of the network</td>
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<td>• Most things learned in a local market stayed in that market</td>
<td>• Learnings are shared and leveraged across key UW markets</td>
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Mapping UW Relationships

ONE United Team.

United Ways and United Way Worldwide will work as one to drive increased donors and revenue with our largest partners. We will succeed by clearly understanding the needs of each partner, working together, sharing resources and creating a strong universal template for corporate relationships that will create positive change.
# Roles and Responsibilities of Core Team

<table>
<thead>
<tr>
<th>Task</th>
<th>Account Leader</th>
<th>GCL Relationship Manager</th>
<th>Local Account Manager</th>
<th>Collaborative Partner</th>
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<tr>
<td><strong>Definition</strong></td>
<td>Accountable for strengthening a strategic corporate partnership and overall growth. Collaborate with HQ UW or GCL RM to co-create strategic growth strategy, leveraging UWW and LUW resources, and to hold priority markets accountable to execution/delivery of plan</td>
<td>Maintain corporate relationship as part of GCL portfolio in order to coordinate UWW “solution team” resources to create business and impact value for corporate partner</td>
<td>Maintain critical local relationships, identify local opportunities to create value and execute national strategy at local level</td>
<td>Partner with Account Leader to co-create strategic growth strategy</td>
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<td><strong>Corporate Relationship</strong></td>
<td>MAIN POINT OF CONTACT, schedules and facilitates meetings with key decision makers (moving “up the value chain”)</td>
<td>Part of core team to strengthen partnership; coordinate with UWW leadership and resources; record interactions in salesforce</td>
<td>Meet and communicate with local leaders and report conversations to the account team in real time; provide local data/information</td>
<td>Co-create meeting agendas with Account Leader; attend phone meetings and if appropriate, attend in-person meeting</td>
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<td><strong>C-Suite engagement</strong></td>
<td>Creates briefings and meeting materials; coordinates with inner-core team members (LUWs)</td>
<td>Coordinate with UWW leadership</td>
<td>Attend when applicable</td>
<td>Provide Input into briefings and meeting materials</td>
</tr>
<tr>
<td><strong>Internal Communication</strong>, calls &amp; meetings</td>
<td>Schedule, set agendas and facilitate monthly team calls, facilitate in-person team meetings, coordinate and partner with account team through regular updates</td>
<td>Set up webinar rooms (if needed), communicate logistic needs to UWW staff</td>
<td>Actively participate on monthly calls; research as needed</td>
<td>Partner with Account Leader to set agendas for team meetings, back up lead for all meetings, actively participate in meetings and take call notes</td>
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Cross-Market Corporate Relationship Management: Accelerate Ability To Scale

• Add strategic markets to existing CROG companies
• Add strategic companies to CROG
• All 84 GCLs in 53 Markets—World Class Global Account Management in GCL companies
• State Associations--State-led/Regional companies
• Network-wide Adoption (ultimate goal)—Every UW managing multi-site corporate relationships—Leverage Conferences and Trainings as an Awareness/Communication Mechanism
UWO Tools and Resources

- Account Planning Template
- Bold Play 3/ Partnership Agreement Toolkit
  - Relationship Management Protocols
  - CEO Discussion Guide (Value Prop and Discussion Guide)
- Turbo Charge your Campaign
  - Donor Retention Stories and Churn Tool
  - Donor Data Collection Toolkit
  - Account Analysis and Prioritization
- Consultation Capacity Diagnostic Tool
- Guidance on Evergreen Giving
- DSOG and Individual Experience Report
- Corporate Resources website
  - Stories, fact sheets, infographics, logos, photos, videos, social media and print material
Thank you