Engagement: How to Start an Affinity Group
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Trident United Way

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United Way of Forsyth County
Agenda

• The POWER of Affinity Groups
• Start Up Tips
• Planning Your Affinity Group: Case Studies
• Affinity Group Action Plan
• Idea Exchange
• Question/Answer
The POWER of Affinity Groups
The Pyramid of Donor Experience

Ultimate Experience
Continuously Deepen Relationship

Advanced Experience
Build Relationship & Loyalty

Basic Experience
Establish Relationship

Ultimate gift
1-on-1 relationship
Offer engagement
Segment based on interest
Segment based on donor interest
Segment based on demographics
Educate impact of giving
Acknowledge and thank you
Learn donor interest
Establish Relationship
Contact and email

Engagement: How to Start an Affinity Group
Affinity Groups

A group of people having a common interest or goal or acting together for a specific purpose.

Merriam Webster
The Road to Community Impact: Changing Directions for Affinity Groups

From

Establishing Affinity Groups to Recognize Donors

Events for networking

Donors hear from UW once or twice a year.

United Way shares information with donors

United Way materials translated to other languages

Transaction

To

Establishing Affinity Groups to Engage Donors

Events for networking and to inform & engage donors.

Ongoing communication with donors

United Way listens to donors

United Way seeks to understand various cultures of giving, and includes in message strategy.

Relationship
Affinity Group Giving Programs
Raised Over $200 Million

<table>
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<th>Group</th>
<th>2010</th>
<th>2009</th>
<th>Pct Chg ($s)</th>
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<tr>
<td>Women</td>
<td>129</td>
<td>$132,575,947</td>
<td>$119,867,267</td>
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<td>Young Leader</td>
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<td>Other</td>
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<td>$5,912,476</td>
<td>$4,504,864</td>
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2005 Affinity Group Total: $120,184,946
Five Year Growth Rate: 67.7%

Engagement: How to Start an Affinity Group
Cumulative 6-yr Growth Comparisons – Affinity Group Giving

% Inc. from 2004

- Women
- Young Leader
- All Affinity Groups
- Current Year Support
- Campaign

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Affinity Group Dollars as a Percent of All Individual Giving

2010 Individual Giving: $2.55B
2010 Affinity Group Giving: $201MM
Impact of donor Affinity Groups over the course of their LIFETIME?

- Average Gift: 3,915
- 2% of Income: 48,880
- Engaged Donor: 217,500
Start Up Tips
Start Up Tips

- Recruit at least one volunteer champion
- Understand your audience
- Staff appropriately
- Establish the gift level
Start Up Tips, continued

Connect the group to the work of your United Way

Help the group focus their work

Determine how to engage the most people in a way that will drive the change you seek

Remember the basics: ASK. THANK. INFORM.

Don’t underestimate the need for the group to have a seat at the United Way table
Additional Start Up Tips

Have fun. Offer opportunities for the members to get to know each other in a social setting.

As your program grows, remember your staffing should increase as well.

Re-evaluate your goals to ensure:

- Relevancy to your core group
- Retention of your donors
- Growth of your donor base
- Impact is made on your community
Planning Your Affinity Group
What Affinity Group should We start at my United Way?

Points to Consider:

• How can I build a program that engages donors over the course of their lifetime?

• How can I build a program that reflects the diversity of our community?

• What group will yield the largest return on investment?
Planning Your Affinity Group: Case Study
Goals

External (WLC)
- Recognize women
- Network
- Educate

Internal (TUW)
- Build & strengthen relationships
- Increase $
- Decrease designations to other 501c3s

Meaningful Engagement
Define Engagement

What is “meaningful” engagement?

• Any interaction that strengthens donor’s understanding of TUW & community impact (event attendance, face to face meeting)

• Strengthens TUW staff member’s relationship with donor
Define Engagement

Engagement opportunities:

• Steering committee member
• Subcommittee member
• Program/event attendance
• Volunteer project participation
• Placement on another TUW committee
Engage in Community Impact

Steering Committee

Chair to serve on TUW Board of Directors

CI staff member speaks at the beginning of each committee meeting for 10 minutes followed by Q&A

Annual Luncheon

Awards

Nominating
Engage in Community Impact

**Annual Luncheon**

Goal is 1/3 membership attendance
- Met all three years

Keynote Remarks connect to Community Impact & WLC Mission
- 2009 Women & Philanthropy (Charlotte Berry, UWA Trustee)
- 2010 Financial Stability (Connie Duckworth, ARZU Studio Hope)
- 2011 Health (Dr. Ann Kulze, Nationally Recognized Wellness Expert)
- 2012 Leadership (Charlotte Beers, CEO, Chariman, Under Secretary of State, Advertising Executive)

* To Be Confirmed
Engage in Community Impact

Awards
Criteria relate to recipient's role in Community Impact and Give, Advocate, Volunteer

- Behind the Scenes Hero
- Nonprofit Leader
- Role Model

Annual Luncheon

Awards

Volunteerism
Engage in Community Impact

Steering Committee

Annual Luncheon  Awards  Nominating

Nominating
CEO level where possible. Strategic and diverse with regards to:

- Workplace campaigns represented
- Outside of workplace represented
- Geographic Region
- Various demographics such as age, race, etc.

Engagement: How to Start an Affinity Group
Engage *in* Community Impact

**Programs**

*Plan three programs/events annually that connect to Community Impact for smaller groups than annual luncheon.*

- **Education**
  - *Town Hall*

- **Financial Stability**
  - *Women & Philanthropy*

- **Health**
  - *Healthy cooking class*
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Engage in Community Impact

Volunteerism

Annual Friends & Family Day of Caring
-Engage children, spouses & friends
-Learn about Community Impact
Goals

External (WLC)
- Recognize women
- Network
- Educate

Internal (TUW)
- Build & strengthen relationships
- Increase $
- Decrease churn
- Decrease designations to other 501c3s

Meaningful Engagement
Measuring Success

External (WLC)
- Recognize women
- Network
- Educate

Internal (TUW)
- Build & strengthen relationships
- Increase $
- Decrease churn
- Decrease designations to other 501c3s
Measuring Success

Building committees
Continued increases in event attendance
Staff leveraging WLC to build relationships within the workplace
Workplace “neutral” so appealing to donors outside of that campaign structure

Internal (TUW)
Build & strengthen relationships
Increase $
Decrease churn
Decrease designations to other 501c3s
Measuring Success

External (WLC)
- Recognize women
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Membership
- 2008: 550
- 2009: 600
- 2010: 675
- 2011: 765
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Measuring Success

Internal (TUW)
- Build & strengthen relationships
- Increase $
- Decrease churn
- Decrease designations to other 501c3s

Educate

Lower churn rate as compared to all Leadership givers in 2011:

8.7% WLC vs. 13.3% All Leadership
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Measuring Success

Focused effort began with 2011 Campaign, and the results aren’t in yet. This will be a challenge across the board, but we want to compare WLC trends to campaign trends in general.

Internal (TUW)
- Build & strengthen relationships
- Increase $
- Decrease churn
- Decrease designations to other 501c3s

Engagement: How to Start an Affinity Group
Goals of WLC

Define
At the core of every decision, event, communication

Network
Educate

Internal (TUW)
Build & strengthen relationships
Increase $
Decrease churn
Decrease designations to other 501c3s

Meaningful Engagement

External (WLC)
Recognize women
Network
Educate

Define
At the core of every decision, event, communication

TRACK!
Trident United Way
Lessons Learned

• Spend significant time planning a launch or re-launch
• Be thoughtful and deliberate as every act sets a precedent
• Recruit leadership that shares TUW vision (ex: our WLC does not have a focus area - rather funds all CI work)
• Learn from other UWs
Planning Your Affinity Group: Case Study #2
YLU members give $250 or more annually and volunteer 24 hours/year in our community.

2010: 432 Members; $249,000 raised

2011: 1,109 Members; $743,000 raised

Since launch in the fall of 2010, YLU members have logged more than 40,000 volunteer hours in the community.
YLU members participate in monthly:

- *Lunch with Leaders*
- Group volunteer activities
- Social events
- Professional Development workshops

YLU members hosted the second annual Rock United in April, raising over $10,000 for United Way of Forsyth County.

[www.youngleadersunited.org](http://www.youngleadersunited.org)
Affinity Group Action Plan
Affinity Group Action Plan

1. Who are your top volunteer champion prospects

2. What are the desired qualities of the person or persons who staff the group?

3. What are the top 3 objectives of your group?

4. How will you connect your group to the work of your United Way?

5. What “benefits” will you provide for your group?

6. How will you know you are successful?
Idea Exchange