

2022 SERC TRAINING CONTENT

RESOURCE DEVELOPMENT:

- **Best in Class Fundraising – Putting it all Together (2 Sessions)**
 - The top fundraising United Ways use best practices across all phases of resource development. These two workshops will dive into how these United Ways work to optimize volunteer fundraising, use data to drive revenue, and diversify revenue through new business and win-back strategies. High performers will provide concrete examples of how they have integrated innovative approaches to drive increased revenue.
- **Best in Class Fundraising – It’s all About Data (1 Session)**
 - Are you using all the data available to make decisions that drive revenue? This session will highlight best practices from high-performing United Ways for overall campaign planning, prioritizing and developing strategies for growing key corporate accounts, developing account plans, and monitoring the results and course correcting.
- **Creative Approaches to Revenue Diversification (2 Sessions)**
 - Successful affinity group models, examples of public/private partnership that are working, converting volunteers to donors, grant opportunities – where/how/alignment, endowments/legacy funds that create sustainable revenue for the future of United Way, local government/mayors/HUD and special funds such as COVID/ARP, monthly challenges and more will be addressed over two sessions of conversation.
- **Driving Tocqueville Society Success (1 Session)**
 - This session will help you leverage the incredible potential that lies within a strong Tocqueville Program by energizing a working Tocqueville Cabinet and by deeply engaging the members of the Society. Participants will first assess their Tocqueville Society’s current state and then use tools to help optimize structure and engagement gaining innovative ideas, strategies and tactics to accomplish greater results.

COMMUNITY IMPACT:

- **Developing a local approach to addressing generational poverty (1 Session)**
 - Learn about replicable models and strategies that address generational poverty, producing impact and raising the value of United Ways with state government, corporate and non-profit partners, and the community at large. This session will be peer led from multiple areas of the southeast.
- **Finding data – other than Census - to support your community impact priorities/work (1 Session)**
 - The use of data, especially community-level aggregated information is a core part of United Way’s overall approach to developing impact goals, strategies, and programs to improve outcomes in education, economic mobility and health. This session will focus on how United Ways can use dis-aggregated data to better understand issues, advance narratives that focus on the systemic causes of current disparities and to inform solutions. United Ways who are using disaggregated data to drive equity in their communities will be featured.

- **Leveraging resource allocation and grantmaking to advance equity (1 Session)**
 - A core part of United Way's work is fundraising and investing those resources back into the community to create positive change. Join this session to learn how your United Way can use investments strategically to focus on closing gaps in opportunities, access, and resources to close persistent disparities between community residents and build the capacity of the community organizations led by people of color. Speakers will reflect on how power dynamics between funders and funded organizations can reinforce and maintain existing inequities. You'll leave with a better understanding of how to leverage the framework to strengthen your United Way's role as a fundraiser and community investor to advance equitable community change.
- **Creating community conversations and engagement that build United Way champions (1 Session)**
 - Community conversations bring knowledge experts and the community together to address local problems. Learn the art of a courageous conversation to collect information on community need and demonstrate your United Way's commitment to the issue. Discuss how to maximize specific strategies to build champions, raise the value of your United Way, and build purposeful plans for achieving impact.
- **Housing initiatives – those new to this effort alongside mature programs that are impacting community change (1 Session)**
 - Learn about HouseKnox, an innovative housing initiative that supports property managers who work with housing agencies, enabling them to become eligible for special benefits that support at-risk populations; and Place Matters, a successful re-housing and wrap around services program which is moving families from homelessness to stable home environments.
- **Mergers and collaborations – joining forces for greater impact (1 Session)**
 - Increasingly, United Ways are looking at how to better work together. Collaborations can lead to increased efficiencies, donor engagement, and innovation. Mergers represent the ultimate collaboration. This session will build off the new Mergers Playbook to explore how to determine if a merger is right for your organization as well as the best and leading practices United Ways have deployed in designing their collaborations and mergers.

INTRODUCTORY 101 LEARNING OPPORTUNITIES – ALL ARE ONE SESSION

- **Advocacy 101**
 - What is advocacy vs. public policy, and what can and should my United Way be doing in this space--and to what benefit? We will give you the basic knowledge of how legislatures and state and local policymaking bodies are structured, tips for effective engagement, and tactics for how to utilize this work to elevate your impact and value. Spoiler alert: you're already doing some of this work--let's make it even more powerful!
- **Grants 101**
 - Grants can generate tremendous outcomes for United Ways that are diversifying their funding and seeking to make bigger impacts in their communities. Come learn about how to find grant opportunities, as well as determine what makes a good fit your organization's priorities. Attendees will learn about typical proposal elements you'll want to have "at-the-

ready", what makes a good proposal, and some tips for setting up a successful grant development process and timeline. Mark will also share about the importance of community and partner engagement as a proposal develops, the benefits of collaborations, and how to cultivate long-term relationships with funders.

- **United Way 101**
- **CRM Lite**

VOLUNTEER ENGAGEMENT:

- **Creating volunteer engagement through various digital channels (1 Session)**
 - Many United Ways are pursuing a strong digital presence, aspiring to provide donors and advocates year-round virtual experiences. This session will tap into the experiences of early adopters of the "always-on" digital approach and provide special insights for optimizing use of all available engagement channels.
- **Developing volunteer experiences that leverage generational differences (1 Session)**
 - This description is under construction.

DEI, LEADERSHIP AND BOARD DEVELOPMENT:

- **Practice equity daily (1 Session)**
 - As you integrate a focus on race, equity and inclusion, you'll need to build individual and organizational capacity so you can move the work forward together productively and sustainably. In this session, you will explore the five ways to help you achieve a stronger equity focus individually and within your organization.
- **Leading a United Way during times of change (1 Session)**
 - Most United Ways are in the midst of one or more transformational change initiatives including become a racial equity champion, strengthening their digital engagement efforts, and framing and unbundling their impact agenda into a set of compelling investment opportunities. Successful change efforts such as these demand a clear vision for success, empowerment of and effective communications with staff and board and alignment of functions and workflow. In this session, UW network champions trained in change management will explore successes and challenges faced as they navigated the life cycle of change at their United Way.
- **Elevating the full potential of your Board (1 Session)**
 - Description under construction but already includes Governance as leadership, fortifying the Board-Executive Director partnership, proactively navigating successful leadership transitions, and more.
- **Effective storytelling and presentation skills for staff and Board (2 Sessions)**
 - Descriptions are currently under construction

INNOVATION STATIONS:

30-45 conversations on specific topic with examples of implementation and discussion on challenges and successes. Contact information shared for follow-up following the conference.

- Success with small business
- Building donors through social media and email marketing
- Success with school campaigns
- Engaging retirees – Stay United
- Success with healthcare campaigns
- First five steps to build race/equity champions
- SNAP Employment & Training services for food stamp recipients
- Afterschool network
- Success with University/State College campaigns
- AARP Experience Care Network
- Third-Party processors and corporate partners
- New business development with UWW
- VITA sites – best practices

CONVERSATION WITH ANGELA WILLIAMS

We are excited to announce that Angela Williams will join the Southeast Regional Conference to hold conversations with United Way Executive Directors. Two time slots will be allotted for these conversations with a maximum of 30 participants at each time slot. Registration will launch in March 2022 for this opportunity.

Angela will join all conference participants on Friday, April 29, 2022, for breakfast and the morning keynote