Southeast Regional Conference

WORKSHOPS

90 minutes in length, workshops provide relevant and mission-driven information for United Way organizations of all sizes.

Welcome to United Way - A Pre-Conference Workshop:
You will learn about United Way's core business: its history, mission, vision, strategy, structure and work, allowing you to understand how you fit into your local United Way and into the larger United Way Network. You will explore current issues facing United Way, discuss how to achieve collective impact and learn ways to maximize revenue, thus creating opportunities for better lives for all.

- When: April 28, 1:00-2:30pm
- Where: The Westin Poinsett, Greenville, SC
- Click Here to Register!

Donor Centered Fundraising for CEOs - A Two-Day Pre-Conference Workshop:
Shifting into a modern United Way means developing best-in-class fundraising experiences. Donor-Centered Fundraising for CEO's is our United Way fundraising course specifically designed and tailored to the needs of CEOs as they make the shift to a modern United Way. CEOs play a critical role in fundraising. From establishing an internal culture of high performance to leveraging board and cabinet engagement to support fundraising efforts. Delve into key topics that will expose you to an entrepreneurial and growth mindset for your fundraising campaigns so that you can put yourself and your United Way in a position to lead and succeed.

- April 27-28
- Location: The Westin Poinsett, Greenville, SC
- Click Here to Register!

Disaster Preparedness and Response Forum:
Hear from United Way leaders who have experienced hurricanes, tornadoes, wildfires, and mass casualties. Engage in dialogue about managing disaster funds, building response services, and preparing your community for potential disasters.

Click here to learn more.
**Data Privacy and Security--A NEW Toolkit for All:**
As the topics of risk management, data handling, and respecting privacy have become priority in the technology industry, it's apparent that the United Way network is not immune to this and there's a larger need to share information, ideas, and have a place to discuss both successes and challenges. To jump start this work, United Way Worldwide’s taking action in a few different ways, including creating resources that apply to United Ways of any size: IT Security Best Practices Checklist, Data Security Considerations for the United Way Worldwide IT Security Checklist, and GDPR Basics for United Ways.

**Know Your Market: Develop “Hot” Impact Agendas that People Want to Buy:**
A market driven impact approach reflects a mix of the following: a deep understanding of community issues based on authentic engagement with residents; knowledge of individual donor interests as well as corporate partner business needs and Corporate Social Responsibility goals; and flexibility to address pressing and new priorities as they arise. Developing market driven impact approaches that individuals and donors connect with requires understanding your community and using this information to develop a compelling impact agenda (community goals, priorities, strategies, programs) that can change as needed.

**Beyond Awesome Volunteer Engagement:**
A Modern United Way knows they must make profound changes in structure, process, and culture to achieve their business and community goals. To be successful, a Modern United Way must also be intentional about how it plans to leverage volunteer engagement for each critical success factor on its journey. Through presentation and in-person and online participant engagement, speakers will highlight essential practices necessary to build, enhance and grow volunteer programs and emphasize practices across functions that United Ways must take to build and deepen relationships with donors, generate revenue and drive impact.

**Modern United Way:**
United Way has been a disruptor since the beginning. To remain a global leader in privately funded philanthropy, we must continue to evolve with communities, partners, and stakeholders we serve. How does United Way activate the worldwide network together to lean into a growth mindset, harness innovation, leverage insights and ensure agility and scale together? This workshop will present a framework and vital behaviors that position United Ways to do just that. The Modern United Way business model, which incorporates diversity, equity and inclusion in all aspects of the work, is the network-wide strategic response to shifts in the philanthropic marketplace. Do you know where you are on your pathway to becoming a Modern United Way? This session will walk you through the blueprint of a Modern United Way and the Critical Success Factors that enable growth and innovation.
**Advocacy in the Modern United Way: Donor Engagement in an Election Year:**
Individuals are seeking meaningful and impactful ways to be involved in their communities to bring sustainable social changes. Advocacy is a powerful tool local United Ways can use to harness the power of people in communities to engage in policy solutions that matter to them. The 2020 election cycle is heating up fast and is an opportunity for local United Ways to engage donors with timely and relevant ways to make their voice heard, register to vote and advocate for issues the matter to them and advance United Way's policy priorities. Elections have consequences for our work in community and the people we serve. Learn how you can mobilize people to be powerful advocates through voter education workshops, voter registration drives, debate watch parties, digital campaigns, get-out-the-count volunteer events and other activities to elevate your community's voice and bring in more engaged donors. The speaker will also address United Way's new campaign - United We Vote, United We Count. This is a year-long effort to engage our stakeholders in helping people be counted and heard in 2020.

**Emerging Model for Affinity Groups:**
Affinity groups are an increasingly popular method for United Ways to engage donors, but they often demand a significant investment of staff time and energy while failing to generate traction in the community. What if there was a better way to do affinity groups? Join us to learn how United Ways throughout the system are adopting an emergent model for affinity groups that attracts new supporters, deepens relationships with existing donors, and creates more meaningful impact in their communities.

**Shared Purpose - Co-Creating Value with Corporate Partners:**
The session will provide an overview of Shared Purpose and products developed and in development. Attendees will leave with an understanding of how to submit and access products and training available for specific products. If desired, separate sessions could be provided as training on specific products developed.

**Building your United Way’s Equity Muscle:**
In this session, United Way team members will share their approach to embedding equity in its board practices, organizational operations, and community impact work; as well as lessons learned along the way. They’ll describe the approaches they took, and provide participants with tools and resources they can apply to their own diversity, equity and inclusion work. The goal? Participants will leave this session energized, inspired, and with “the next right move” to take to further their United Way’s equity work.
**Power Your Corporate and Donor Engagement Using Global Results Framework:**
Global Results data can strengthen our corporate relationships by sharing information many investors desire most – compelling data points and stories illustrating the impact they are helping to deliver with others across communities through their investment in United Way. In 2019, 59 Global Corporate Leader (GCL) companies received GRF Corporate Snapshots that showed how GCL companies are helping more children be ready for school, youth transition to college and career, families achieve greater financial stability and live healthier lives. Come to this session to hear how your United Way can leverage the results to deepen engagement and understanding of United Way’s shared value add in communities.

**Leading an Organization Through Transition:**
This session is a CEO, Volunteer, Executive level discussion. Participants will explore the environment of today and consider the shifts in the nonprofit sector and their own organization. They will hear about United Way’s ongoing transformation – learning about key steps (and missteps) – as an organization with an established legacy and how they compete and have made big bets on the future as one example of a strategic question of the Board. Presenters will discuss their partnerships – including how they've had to partner to find ways in which to do new things that are needed.

All through the lens of the ultimate goal: driving community change and fight for the health, education, and financial stability of each person in each community.

**Creative Approaches to Increasing Revenue and Impact:**
A market-driven impact approach offers multiple opportunities for people to give and to be engaged at different levels (high-level issues, United Way led initiatives, discrete programs/products, etc.). Flexible approaches to selling United Way's impact work to investors are essential. All impact efforts, including grant-funded projects, are fair game for donor support. Aim to sell your work at different levels and in different ways based on what "hooks" donors - donors may be willing to give to an issue (e.g. early childhood) or a specific program (e.g. literacy tutors) or lend their time (e.g. stuff the backpack).
Best in Class Fundraising – Leveraging Volunteers and Data:
Are you using data to make informed decisions? Are you effectively using volunteers to deepen relationships and scale fundraising efforts? This session will highlight best practices that are helping to drive revenue at high performing United Ways. Strategies and tactics will be discussed around using data to drive performance year-round, effectively leveraging volunteers to increase revenue and engage employees around issues they care about (via affinity groups or other donor segmentation).

Opportunity Housing Collaborative:
The Spartanburg community began addressing housing in 2016 when United Way of the Piedmont launched a collective impact initiative to address barriers to financial stability. A housing coalition formed, and they branded the housing efforts "Opportunity Housing," which is inclusive of homeless services, market rate housing development, and everything in between. The key to their success has been building a diverse coalition, led by United Way of the Piedmont, covering everything from transitional housing to establishing a Housing Trust Fund. Panelists will discuss the process of building the Opportunity Housing Collaborative, explain how a coalition can balance the different aspects of housing issues, and share a variety of strategies for addressing housing in a growing region.

Volunteer Engagement That Builds Brand Loyalty:
Current donors and prospective donors are looking for a deeper United Way relationship beyond an annual gift. See how one United Way is developing engagement opportunities that impact strategies to deepen relationships and loyalty. During this session, you will hear innovative engagement opportunities like skill based volunteerism, foundational learning experiences and signature projects and how they connect to United Way of Greenville County’s work.

Major Gift Engagement for All Markets/Multi-Year Gifts:
This session will be a collaboration between Kristi Shepard, Chair of the Subcommittee of the Major and Planned Giving Council that developed this resource guide and a representative from UWW (either Jennifer Gipp or Evelyn Morgner).
Capturing the Full Potential of Your Board:
Do you struggle with attendance at board meetings or with getting your board members to participate on committees and help with workplace campaigns? This session tackles these struggles while giving you the opportunity to share your board-related questions and challenges. This session will unlock your board’s full potential by showing you how to engage and empower your board to advance the work of your United Way.

Activating Corporate Partners Through Volunteer Engagement:
How can you use volunteer engagement to initiate, build, or deepen relationships with corporate partners? Hear case studies with replicable strategies from two different United Ways. You’ll walk away with concrete ideas you can implement, regardless of size, budget or staffing.

Addressing the Cliff Effect Through Donor Engagement:
Learn how United Way of the Piedmont is engaging donor networks for alleviate poverty in our community, particularly single-mother families at risk of experiencing the cliff effect. United Way of the Piedmont's Women United and ADT Advisory Boards have implemented strategies to take donor engagement beyond an annual thank you event. In this session, presenters will share about the success they've seen in providing ongoing opportunities to deepen awareness and impact, including Collective Impact Community Bus Tours, a Cliff Effect education series, and developing a Cliff Effect Fund.

Strong Neighborhood Project - A Collective Impact Approach:
The Strong Neighborhood Project is a collective impact approach to neighborhood development, community engagement, and service delivery. It incorporates seven pillars of a strong community, based on The Abundant Community by Peter Block and John McKnight. Each pillar is represented by a team of volunteers from nonprofit and government agencies, as well as local corporations and community volunteers. While the project focused on three census tracts with high rates of poverty, it provides an innovative model for serving a wider area. It represents a different approach to linking neighbors with each other and with needed services.
Unlocking the Potential for National & Cross-Market Corporate Partnerships:
The objectives for this session will be to provide attendees better understanding of the Corporate Relations team at United Way Worldwide and how we manage our national and global portfolio. This session will also offer strategic account management practices, tools, and resources to help you drive donors, revenue, and partner satisfaction. We will also touch working together cross-market to deliver consistent experiences for our corporate partners.

Result-Driven Goals:
When you have the right goals in place, you’ll see positive results. The catch is that goal setting is easier said than done. Your goals should be based on data that has been well analyzed, not on gut feelings, assumptions, or superficial stats. Attend this session to learn how to take your data analysis to the next level. Hear how other United Ways analyze their CRM data to create actionable goals that lead to positive results. Walk away from this session with a worksheet that you can apply to your organization.

Being a Masterful Storyteller:
Do you want to improve your public speaking, communication and leadership skills? This session will help you maximize your potential and build self-confidence by working on communication skills in a supportive environment.

NCCARE360 - A Statewide Coordinated Care Network:
Through NCCARE360, North Carolina is the first state in the country to create a shared statewide technology infrastructure and coordinated community networks uniting health care and human services, enabling providers to connect to North Carolinians to the resources they need to be healthy, safe and well. Through a public-private partnership between NC DHHS and the Foundation for Health Leadership & Innovation, and a novel collaboration between United Way/NC 211, Expound, and United Us, NCCARE360 is a groundbreaking tool that has the power to transform lives and impact communities across North Carolina.

Learn more about how NCCARE360 has helped United Way of North Carolina raise the bar on community resource verification, United Way leadership and highlight how 211s plays an important role in supporting a technology solution addressing connecting people to social determinants of health. Year One best practices and lessons learned with also be shared with discussion about the impact on various size United Ways.
Using 211 to Become a Modern United Way:
Across the network 211s talk to more than 35,000 people each day – loaded with stories and statistics, 211s are poised to tell the story of a community and provide United Way with a modern impact product. Whether a United Way operates a 211 or provides funding to an independent 211, this workshop will focus on helping a United Way harness the value of 211 messages, stories, and data to help infuse their activities in becoming a modern United Way.

This workshop will combine product development, storytelling and data/technology to help a United Way understand how 211 fits into the various components of a modern United Way. With a focus on creating compelling products, this working will also show how 211 helps understand markets, address relevant issues, deliver awesome experiences, and provide services year round.

Connecting with Donors Digitally and Growing the Base:
This is a 201 level session. Interactive session updating United Way professionals about Digital Services and the benefits that United Ways are seeing with donor journeys, lead journeys and customizable content.

Developing a Local Approach to Addressing Poverty:
There is no cookie-cutter solution for poverty - every community is unique, which is why every United Way's approach needs to be locally appropriate. In this session, you will be guided through a step-by-step process that will allow you to transform your United Way's work to more effectively impact poverty in your community. The presentation will look closely at how United Ways of all sizes have implemented these steps and their breakthroughs addressing poverty.

Marketing/Communications 201:
Description coming soon...