



MODULE 1 – Why United Way? E-Learning

United Way history, mission & Vision
Role and historic development of philanthropy
The power of United Way
Brand
Snapshot of resources raised [RUM]

MODULE 2 – United Way Network

[The Network-Wide Strategy –](#)

5 Bold Plays
Business Model
Your UW and your role in the success of the network-wide strategy (BP 1, 2, 3, 5) working together as a Network

MODULE 3 – The Donor is our Customer, Impact is our Business

Fundraising Constituencies
Segmentation of Donors [Ethnicity, Age, Gender, Generational Differences, LGBT]
Reasons for Giving
Barriers to Giving
Product Development

MODULE 4 – The Brand, the Message & the Case for Support

Brand Credo
Message the Case for Support
Brand Experience
Year Round Communications
Ask, thank, inform, engage (in the perfect world) model

MODULE 5 – The Plan to Engage: Corporate

1. Corporate Engagement – First through understanding CSR, then understanding the UW corporate engagement platform and finally the role UW can play as a business partner through...

- **Employee Engagement-how UW best supports corporate partners**
 - Labor
 - Volunteer Programs & Support
 - Employee Education
 - Skills Based Volunteering
 - Board Seats
 - Professional Development
 - Loaned Executives
 - Digital Services Operating Group (DSOG)

MODULE 5 – The Plan to Engage: Corporate / Corporate Engagement (continued)



- **Impact**
 - Community Needs Assessment
 - Impact Products
 - Advocacy
 - IDAG
 - **Reputational Lift**
 - Recognition & Public Relations
 - Corporate Sponsorships
 - Cause Marketing
 - Licensing
2. Centralized Corporate Engagement – Worldwide
- Global Corporate Leadership (GCL)

MODULE 6 – The Plan to Engage: Individual.....

1. Give
- Workplace Campaigns
 - Leadership Giving
 - Transformational Giving
 - Planned Gifts/Endowments
 - Digital Experiences
2. Advocate
- National and Local Advocacy
3. Volunteer
- Day of Action
 - Skill Based Volunteering
 - Women’s Leadership Council
 - Emerging Leaders
 - Tocqueville Society
 - Board Seats
 - Read, Tutor, Mentorships

MODULE 8 – Keep Donors Involved & Engage

Retention

Year Round Engagement with communications

Individual Experiences

- Engaging donors without their information