

I. Executive Summary

In the fall of 2014, the Board of Directors of the United Way of Greater Richmond & Petersburg approved a Task Force to review and make recommendations on how funds are raised to support our Community Impact Agenda. The outcome of that work is this Resource Development Playbook.

Taking into account our United Way's bold goals in Education, Income, and Health, and responding to historical, generational, environmental and economic situations, this Playbook is focused on building relationships with individual donors and increasing the amount of Resources Under Management. The strategy is built on three primary aspects for successful fundraising:

- A community-centered approach to engage all residents of Greater Richmond. This approach surrounds the traditional workplace campaign and embraces the diversity of our region to allow for additional and varied volunteers, donors and dollars.
- Fundraising will be a year-round endeavor, supporting the best-practice of donor engagement and allowing for short-term, goal-oriented appeals.
- The focus of all fundraising is to support United Way's Community Impact Agenda not only to increase Resources Under Management but also to support awareness and education of our research and Indicators of Community Strength report.

Foundational to this Playbook is the process of fundraising in terms of acquisition (gaining or re-engaging donors), retention (returning donors annually), attrition (the loss of donors) and engagement (involving donors in an authentic way). Donor engagement is key to retaining donors and can be measured in financial transactions (gifts received), actions and activities, and communications. All recent research shows that high levels of donor engagement are directly proportional to high levels of donor retention.

The Campaign Cabinet should be comprised of a Campaign Chair, Vice Chair (incoming chair), Alexis de Tocqueville Society Chair, the Donor Relations Committee Chair (a Board committee), and cabinet members from specific corporate and/or public sectors in the community. Key qualifications include a commitment to the mission of UWGRP, financial support of United Way at a personally meaningful level, association with corporations and individuals who support United Way, and be a professional or personal peer to corporate decision makers in our top 50 workplace campaigns.

Internal staff structure is detailed, including roles and expectations of the individuals in Resource Development, Strategic Engagement & Emerging Markets, Public Relations & Communications and Grants. Additional paid staff recommended includes separating the roles of Administrative Assistant and Database Manager into two full-time positions, adding two additional Relationship Managers and a dedicated Events Manager. Loaned Executives from partner companies are recommended as additional staff support for the workplace campaigns, with a suggestion to consider recently or soon-to-be retirees.

Audiences are addressed separately, starting with the Board of Directors and moving through Workplace Campaigns, Individuals, Leadership Givers, Non-traditional Companies (supporters but not traditional workplace campaigns), Foundations, Volunteers and the Community at large. Affinity groups which currently include the Women's Leadership Council, Young Leaders Society, Loyal Contributors and Employee Campaign Council are also specifically addressed. For each of these audiences, recommendations are provided for acquisition, engagement, retention, expectations, participation, and goals.

Marketing and communications is addressed in its own chapter, with discussion of the foundational goal of answering the question “Why United Way?” A successful strategy will support the process of meeting individuals where they are, starting with educating stakeholders and raising awareness to build and maintain the organization’s reputation. From there, engaging these individuals as appropriate (i.e. volunteering, joining an Affinity Group) and ultimately making fundraising requests to support the Impact Agenda. Whether the communications is delivered via public relations, advertising, social media or other mediums, it should be timely, actionable and resourceful.

The Resource Development and Campaign Cabinet leadership should provide a realistic projection of Resources Under Management to be raised in March prior to the upcoming fiscal year start (July 1). The larger, external fundraising goal should be a “realistic stretch goal” and include all funds that run through United Way (RUM, designated funds, grants, investments and fee income). The finance and fundraising teams should work together to create a multi-year goal with a more business-like approach to the process, engaging board members for guidance. The campaign goal reporting should be communicated with honesty and transparency, using an infographic to show how the funds were raised, and how they were used to support our Impact Agenda.

Concurrent to the development of this Playbook, a Technology Task Force has been at work looking at external technology needs such as pledging and online giving as well as the internal needs of the staff including hardware, servers, and software database support. The Playbook will be updated with the most current recommendations as they become available.

No effort should be undertaken without metrics that track the results and our resource development campaign is no exception. Beyond the obvious “did we meet or exceed our fundraising goal?” we look for a change from campaign-centric to donor-centric thinking in our staff and volunteer leadership as a key success indicator. This means donor engagement plans are as important as numbers-focused campaign reports. This also evolves to the greater community’s awareness of United Way’s impact in Education, Income and Health, and their willingness to engage with us to increase that impact. Ultimately, a sustainment plan to attract major gifts should be developed. And staff and volunteer leadership should look for additional partnerships with funders and services providers to reach the ultimate indicator of success: a region where all residents have equal opportunities for success.

Some of the Big Ideas to help reach this goal include:

- Sell bold targets as “products” to increase donations to the Community Fund
- Find an opportunity for the Campaign Chair to make a big, public ask/solicitation
- Improve the electronic pledging and online giving platform
- Create a sense of urgency at specific moments in the campaign to drive giving
- Create a community-wide competition or tournament to increase participation
- Develop social media based, one need, limited time mini-campaigns
- Create a product out of our Community Indicators Report

The Task Force believes this Playbook should be considered a living, breathing document –one to be constantly reviewed and updated based on successes of recommendations, aligning priorities of efforts with the goals and capabilities of the United Way staff and volunteers. It is our hope that this work will provide adequate support for achieving bold goals in fundraising to support the bold goals of community impact.