

Report of the Workplace Giving Task Force

May 17, 2010



Facilitated by:



FOUNDATION FOR THE CAROLINAS

Acknowledgements

Thanks are due to the many people who helped the Workplace Giving Task Force get started, learn much and offer its recommendations to the community. First, to the group of community leaders who met in Spring, 2009 and requested that Foundation For The Carolinas convene a group to study workplace campaigns in Mecklenburg County. They got the ball rolling to form the Workplace Giving Task Force (WPG). Wells Fargo Executive Laura Schulte deserves praise for her leadership as WPG Chair. More importantly, we thank her for her courage in taking on this big job when new to the community. She brought perspective as a newcomer to Charlotte, but also wisdom as a veteran of several other cities in which she has lived and contributed to workplace campaigns and community philanthropic culture.

Scott Provancher and Laura Belcher from ASC, and Jane McIntyre and Shannon Young from United Way of Central Carolinas were also courageous. They took a leap of faith in joining the Task Force, despite the risk that they would be subject to criticism during its work. They each were remarkable in their ability to provide an insider's perspective on valid criticism and misplaced emphasis, without defensiveness. All of us should be so accepting of constructive criticism and so able to recognize how to adapt to new concepts.

The Task Force members gave a substantial amount of time and provided an equally substantial amount of brain power to analyze mountains of data. They are to be commended for their selfless service to the community. Janet Gessner Alford, the consultant who worked with the Task Force, deserves credit for synthesizing the mountains of data from a multitude of sources. She also was the principal author of this Report, which is a body of work in itself.

Finally, it is a tribute to the greater Charlotte community and its can-do attitude that such a thing as the Task Force could be called into being - and then, after careful analysis and much consideration - offer solutions to the community with the community's best interests at heart. Many other communities have suffered similar economic set-backs in recent years to the detriment of their nonprofit sectors. However, to our knowledge, none have tackled the problem in such a comprehensive and head-on manner.

On behalf of the Workplace Giving Task Force, we offer the Charlotte community this Report, and trust that it will be received in the spirit intended.

Bart Landess, SVP, Foundation For The Carolinas

Principal Editor

Task Force Members

Laura Schulte, Chair	Wachovia, a Wells Fargo Company
George Baldwin	Piedmont Natural Gas
Dan Clodfelter	Moore & Van Allen
Susan Faulkner	Bank of America
Harry Jones	Mecklenburg County Government
Marc Manly	Duke Energy
Rolfe Neill	Charlotte Observer (retired)
Bill Parmelee	National Gypsum
Gene Pridgen	K&L Gates
Tami Simmons	Wachovia, A Wells Fargo Company
Kiley Rawlins	Family Dollar
Pat Riley	Allen Tate
Michael Rose	Carolinas HealthCare System

Staff Support:

Scott Provancher	Arts & Science Council
Laura Belcher	Arts & Science Council
Jane McIntyre	United Way of Central Carolinas
Shannon Young	United Way of Central Carolinas
Michael Marsicano	Foundation For The Carolinas
Bart Landess	Foundation For The Carolinas

Consultant:

Janet Gessner Alford	Alford Consulting
----------------------	-------------------

Executive Summary

A group of leaders convened by Foundation For The Carolinas (“FFTC”) in Spring 2009 requested that FFTC take the further step of inviting a task force to study the most effective means of supporting the nonprofit community in Charlotte through workplace giving. A task force of thirteen members representing various workplaces and the community was engaged beginning in September 2009. They were charged with reviewing workplace giving in Charlotte following the precipitous recession that devastated workplace giving in 2008 and 2009. After eight months of due diligence, study, discussion and analysis they provide the community with this Report and its recommendations.

Findings

The following are the key findings of the Workplace Giving Task Force. Each will be discussed in turn below and in the Report, which follows.

Workplace Campaigns Are Critical: The intrinsic value for which workplace campaigns were created still holds true today: together we can do more than can be done separately. The highest and best use of workplace campaigns is to maximize *local* giving. The process used by campaign organizations such as United Way of Central Carolinas (“UWCC”) and Arts & Science Council (“ASC”) to select recipients and uses of funds assures that gifts will provide maximum community impact. Also, it is important to provide and maintain a safety net, recreation and amenities for our community. Furthermore, workplace campaigns foster collective community pride, as well as leadership and economic development. When run well, they provide an important means of deepening relationships between employees and the community.

Changing Workplace Campaign Models Changes Their Impact: When workplaces change their campaign models, it changes the type of impact they have. For example, if a workplace allows donors to give to any charity no matter its geographic location, there may be equivalent or even greater overall giving - but *local* giving to *local* charities is diminished. The introduction of multiple potential beneficiaries crowds the field: it makes it difficult for any of them to succeed because their message is drowned out by the multiplicity of messages.

The Philanthropic and Giving Landscape Has Changed: The rapid economic contraction of 2008-2009 disproportionately affected Charlotte, but this was but one of the forces at work in the changing philanthropic and giving landscape. Social and demographic changes in Charlotte, including the emergence of new leaders with global responsibilities, have shifted the center of gravity. Resentment over strong-arm fundraising tactics and a desire of donors to experience and have a degree of control over their philanthropy are just a few contributing forces at work.

Responsibilities of Participants: To tap the value of workplace campaigns, both the campaign organizations, and the workplaces that conduct campaigns, have responsibilities. These responsibilities hold true regardless of the particular type of workplace campaign model.

Workplace campaign organization responsibilities

Communicating a clear mission and purpose, including establishing transparency in operations, to build the case and value for giving.

Customizing the campaign for the workplace.

Continuously engaging constituents, including involving them in creating goals and experiences related to the campaign and reporting of impact.

Coalition Building, to provide the depth and breadth of skill, knowledge, experience and community goodwill to address large issues.

Workplace host responsibilities

Leadership: Workplace leaders need to promote the community first message of workplace campaigns (“live here, give here”), as well as the overall value of campaigns to the workplace, the individual and the community.

Execution: Anything worth doing is worth doing well. For workplace campaigns, that means following the recommended course and best practices of those who regularly conduct campaigns, while partnering with the workplace campaign organization to customize the effort for each workplace.

Fun: One of the most striking differences between campaigns that do well and those who do not so well is the amount of engagement, excitement and fun present in the former campaigns. There is much to experience, great stories to be heard and wonderful events to bring colleagues together in common cause for the community.

Recommendations

The Task Force began with the hypothesis that workplace campaigns are local campaigns, intended to assist the local community. After careful analysis and synthesis of the data, and much discussion of the findings, the Workplace Giving Task Force offers the following broad recommendations, that: (1) there is an optimal model to align community, corporate, nonprofit and donor interests for the benefit of the local community (2) best practices in campaigns are useful even if the optimal model cannot be followed, and (3) ASC and UWCC should emphasize a continuous change and improvement culture. The report that follows provides greater detail about the recommendations, which are treated briefly below.

Optimal Model

1. ***Sponsor Single Purpose, Separate ASC and UWCC campaigns:*** The value of workplace campaigns comes from their capacity to work in the local community to make the best use of charitable dollars. To assist in that cause, “closed campaigns” or single purpose campaigns (meaning for those organizations only) is the model that maximizes local community dollars - and thus the one we

recommend. The campaigns should be conducted separately to provide focus and clarity of message.

2. ***Offer a Third Campaign for Choice:*** For those workplaces which desire to provide a broader array of campaign options, there is no better alternative for the community than hosting three campaigns, presuming that two of them are ASC and UWCC-only campaigns and the third campaign provides additional choices for employees.
3. ***Follow Best Practices, Even if the Optimal Model is not Possible:*** The Task Force recognizes that many national corporations (and others, as well) prescribe particular workplace campaign models, and that some of these models may differ from the single-purpose campaign. In light of this reality, there are best practices available to help the campaign maximize dollars for the local community, no matter what type of campaign a workplace host chooses.

ASC and UWCC Culture of Continuous Change and Improvement

1. Investing in Solutions, Not Just Allocating Dollars: If donors believe that they are passing dollars through a fundraising organization and losing a portion of the contribution to the cost of the campaign in the process, then naturally the presumption is that direct donations would be more effective. If, however, the campaign organization has identified issues to address, and the workplace campaign is focused on the issues, then donors recognize the “value added” of this relationship. ASC recognized this need in its 2007 Strategic Plan and is looking toward issues; UWCC has started the process by commissioning a community needs assessment and will follow.

a. Community Needs Assessment: To determine the most pressing needs of the community, and the capacity of the community to address them, community needs assessments will be required.

b. Strategic Planning: Following a community needs assessment, strategic plans will be the next step in addressing the needs identified.

c. Coalition Building: After identifying needs and strategic planning, coalitions of individuals, corporations, nonprofits and governments are necessary to tackle large, integrated efforts to deal with community-wide issues.

d. Choosing Funding Partners: After assessing needs, developing strategy and building a coalition of community partners, the funding partners are chosen to execute the strategy that has been developed. This model is different from the current campaign organization model in that the funding partners are chosen **after** substantial other work and are likely to rotate in and out of projects, as opposed to having a constant annual funding stream from the annual campaign.

e. Reporting Impact: As ASC and UWCC adopt community goals, and focus on issues, one of their strategies will be to continuously update the community on their efforts and their impact. For instance, if an educational goal is adopted, then appropriate measurements can be determined. An annual (or more frequent) report would detail progress, as well as methods used and the need for any changes.

2. Clarity of Purpose and Value: Many of those interviewed mentioned that they were not clear on the purpose and value of ASC or UWCC. Each of the workplace campaigns needs to be sure that they clearly state their purpose and value, as well as their goals.

3. Broaden and Deepen the Donor Base: The penetration rate of ASC and UWCC into the community is good, especially compared to national data, but could be broader. In addition, there are methods beyond the workplace campaign, which can be used to both broaden and deepen donor relationships, such as:

a. Cultivating individuals after the campaign;

b. Expanding geographic reach;

c. Seeking Large gifts for special projects;

d. Using best practices;

e. Adopting new models beyond the workplace campaign.

4. Transparency: Particularly during a time of change, transparency in operations and communications can lessen concerns regarding decision-making processes and uses of money. Transparency is always the most important value in creating trust and key to successful fundraising.

* * *

The Task Force developed this report for the benefit of the community. Our hope is that it will provide guidance for all donors who support the collective health of our community, ASC and UWCC, and all the workplaces that host workplace campaigns. Charlotte has been - and is - a place of great growth and promise, and we are privileged to make what we trust is a thoughtful contribution to its future.

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Report of the Workplace Giving Task Force

I. Convening of Task Force

- a. Forum of Leaders**
- b. Mission of Task Force**
- c. Membership**
- d. Startup**

I. Convening of Task Force

a. Forum of Leaders

In the Spring of 2009, Foundation For The Carolinas (“FFTC”) hosted a meeting of community funders, including private foundations, corporate foundations and community leaders, to consider the difficult circumstances facing many nonprofit organizations (the “Forum of Leaders”). The downturn in the economy in 2008 had reduced funding for nonprofits and tax revenues for the government, as well as profits in the corporate sector. Nonprofits were faced with reduced funding from government programs, gifts and earned income, as well as dramatic reductions in endowment values for those fortunate enough to have endowments. In response to these multiple factors, the Forum of Leaders was faced with a stark decision. Should they allow for a Darwinian “survival of the fittest” shakeout in the nonprofit sector, or should they try to address the situation and recommend a course of action?

The Forum of Leaders chose the latter course and created three task forces. The first was The Critical Need Response Fund, which was renewed in winter 2010. The second and third task forces became the Community Catalyst Fund (“CCF”) and the Workplace Giving Task Force (“WPG”), each involving various community leaders and funders, as well as representatives from the Arts & Science Council (“ASC”) and United Way of the Central Carolinas (“UWCC”). The CCF was intended to focus on the delivery system used by nonprofits to provide services, essentially the expense side of the ledger. The WPG was focused on the future of workplace campaigns, a large portion of the revenue side of the ledger for health and human services, arts and culture.

b. Mission of Task Force

The WPG Task Force was charged with evaluating the ongoing effectiveness of workplace campaigns in the greater Charlotte area. And, if effective, then determining the most productive and effective means of supporting the nonprofit community in the greater Charlotte area through workplace campaigns. Eventually, after discussion and consideration, the Task Force recognized that, though they were talking about the methodology of workplace giving, their ultimate mission was to help the community develop resources to accomplish the broad goals of human service, arts, culture and economic development.

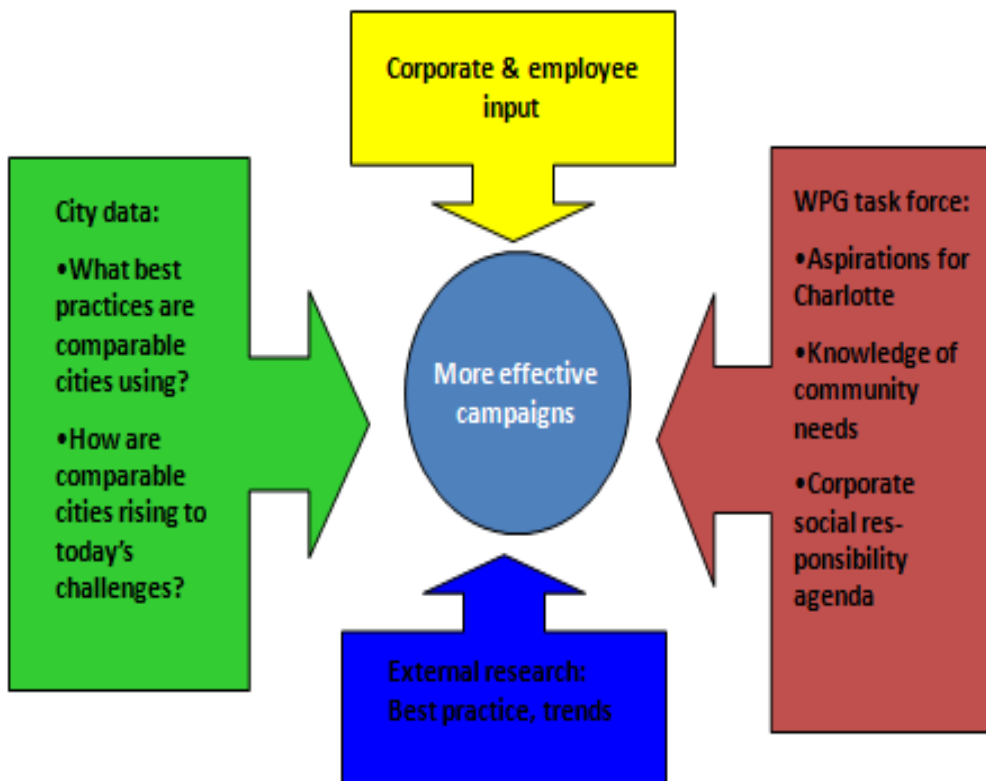
c. Membership

FFTC, UWCC and ASC chose members for the WPG who would represent large and small campaigns, geographically dispersed workplaces and community leaders.

d. Startup

The WPG first met in September of 2009. We began by conducting research on national and local trends in federated campaigns, then looked for best practices and new models, we conducted interviews with local companies and other federated campaigns and experts nationwide. The WPG received information from the CCF, in the form of data developed by the consultant to CCF, Bridgespan (see Section II). The WPG hired a consultant, Janet Gessner Alford, who had experience with both ASC and United Way Worldwide.

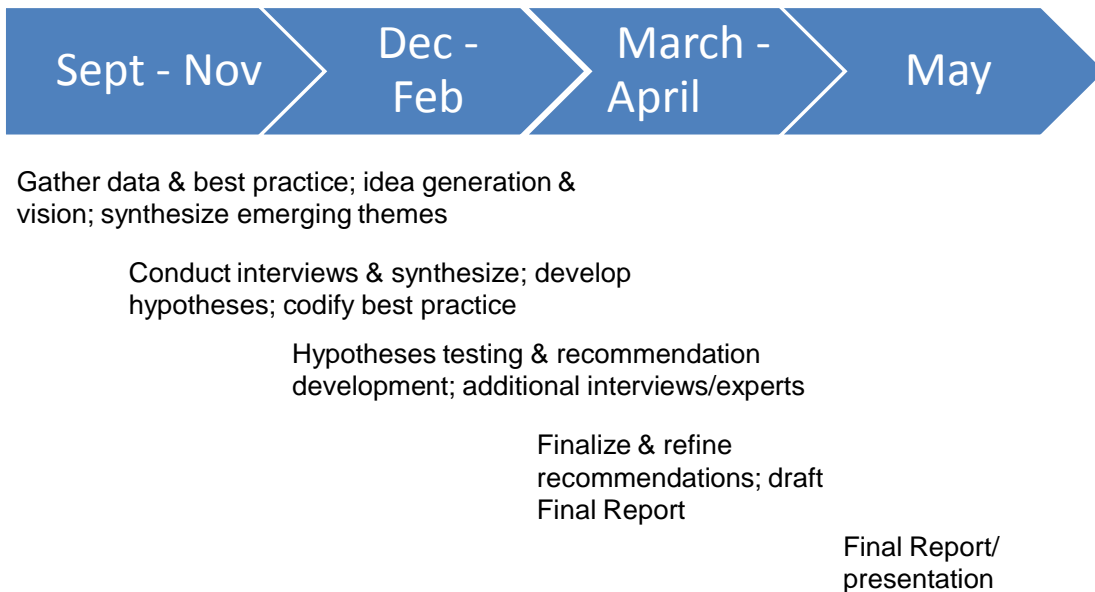
Approach to Task Force Work



The Task Force convened in late September, 2009 and began what became an eight-month process of “taking the pulse” of the workplace campaign from the perspective of all stakeholders (see chart above). Through numerous interviews with workplace campaign hosts, donors, community leaders and ASC and UWCC themselves, the Task Force members developed a strategic picture of the opportunities and challenges facing Charlotte’s workplace campaigns. The Task Force then tested this picture through many interviews with United Way and United Arts colleagues in comparable cities, including Atlanta, Louisville, Cincinnati and Seattle.

Over a series of monthly meetings (see chart below), the Task Force learned from interview findings and synthesis of research. In addition, United Way of Greater Los Angeles CEO Elise Buik visited the Task Force for its February meeting. At that time, she presented first-hand the steps that UWGLA underwent to transform itself from an organization that funds agencies to one that funds community issues and needs. Lessons learned from UWGLA's multi-year transformation were particularly helpful and contributed to the shaping of the Workplace Giving Task Force recommendations.

Overall Project Plan: 2009 - 2010



Report of the Workplace Giving Task Force

II. Review of Mecklenburg Nonprofit Community

a. Size and Scope of Issue

b. Need for Long Term Solution

II. Review of Mecklenburg Nonprofit Community

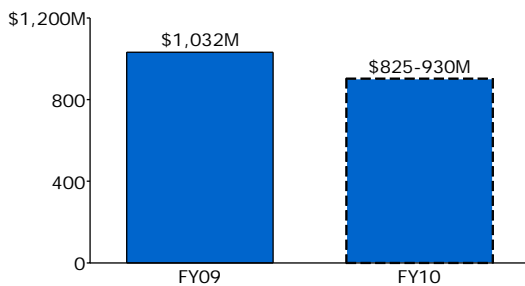
a. Size and Scope of Issue

The Task Force began with the fundamental question of whether workplace campaigns are or not valuable. That question was answered in the affirmative, given that they contribute at least \$28 million to the local nonprofit sector, even after the drop in receipts. In addition, several Task Force members noted that workplace campaigns in their companies had ancillary benefits of community pride, workforce development and professional development (for campaign leaders).

The Task Force then considered whether it would be possible to conduct a supplemental campaign to replace lost revenues. An early review of the number and status of nonprofit organizations operating in Mecklenburg County made it very clear that it would not be possible to simply launch a capital campaign to replace the revenue lost during the downturn. First, the deficit was greater than \$100 million¹, and second, it was going to repeat itself for at least several years as the economy recovered.. Many in the nonprofit sector were and remain vulnerable.

Estimated Drop in Funding

Estimated revenues for C-M nonprofits



Estimated budget cuts:

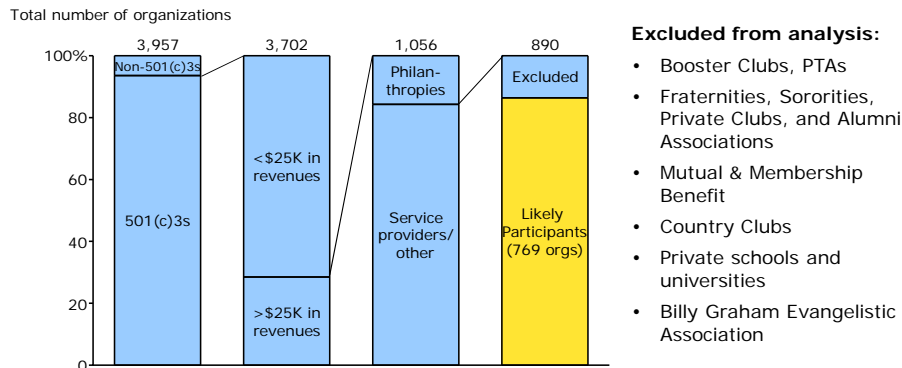
- **Government:** -10% to -20%
- **United Way:** -37%
- **Arts & Science Council:** -33%
- **Foundations:** -5% to -25%
- **Individuals:** -8% to -18%
- **Corporate:** -20% to -30%
- **Other:** -5% to -15%

¹ Bridgespan nonprofit sector scan, Fall 2009.

b. Need for Long Term Solution

As a result, the WPG quickly focused its efforts on how to change and/or revive workplace giving campaigns as an annual revenue stream for nonprofits that provide both the safety net and the inspiration for our community, as well as protecting its quality of life and its ability to attract new businesses and other economic development. According to the Bridgespan data, there are approximately 4,000 nonprofit organizations in Mecklenburg County and at least 769 nonprofit organizations in Charlotte-Mecklenburg that depend on workplace campaigns and other public and private support for their operations.

Survey of Mecklenburg Nonprofits



The Task Force next considered whether ASC and UWCC are the best organizations to conduct workplace campaigns in Mecklenburg County. The Task Force members believed that it would take longer and be more difficult to create and/or build up new campaign organizations than to rehabilitate existing ones. Interviews later bore out this conclusion, as many exhorted the Task Force to not throw out the baby with the bathwater, meaning that the current challenges faced by ASC and UWCC are not sufficient reasons to abandon the organizations or their missions.

Report of the Workplace Giving Task Force

III. History of Charlotte Workplace Campaigns

a. Reason Created

b. Successes

c. Challenges

III. History of Charlotte Workplace Campaigns

a. Reason Created

Originally, both the ASC and the UWCC were created and championed by the community to solve what were perceived to be difficult problems that needed collective action. The business community was concerned that successful businesses were constantly solicited by nonprofits. Business leaders very much wanted to support the community, but did not want to detract from the productivity of their workplace. In addition, the South of the mid 20th century, when both ASC and UWCC came to full flower, was not a place of great wealth. As a result, any major projects, such as a consistent safety net for families or the building of cultural organizations and arts facilities, needed collective action. It was also a source of community pride and economic development to create and maintain a safety net for families, and recreational amenities that otherwise would not be available.

b. Successes

From these beginnings as problem-solvers, the ASC and UWCC became large and successful organizations. In the 1990s, as Charlotte grew rapidly, they were leaders in the nation. UWCC and ASC, at various points, were top-ranked campaigns of their type in the United States. From the early days of their efforts, there was a large amount of civic pride involved in taking an active role in the two campaigns and the many initiatives that they championed.

c. Challenges

However, by the turn of the 21st century, Charlotte was a very different place. The small group of community leaders who were trusted to direct ASC and UWCC, as well as the other engines of growth and prosperity, including the largest corporations, government, had retired. The city had grown and diversified. And the campaigns, though successful, relied more and more on a top-down model of fundraising that depended, whether intended or simply perceived, on strong-arm tactics.

Report of the Workplace Giving Task Force

IV. The Perfect Storm

a. Introduction

b. Economy and Demographics

i. Rapid Growth

ii. Sudden Downturn

c. Demographics and Leadership

i. Decentralized and Diversified Workforce

ii. Global Corporations

iii. Retirement of Leaders

d. Communication Challenges

i. Value Proposition Unclear

ii. Scandal at UWCC

iii. ASC Leadership Transition

iv. Concentration of Donors

v. Changing Expectations

1. New Opportunities for Donor Control

2. Community Expectations of Participation

IV. The Perfect Storm

a. Introduction

When the Foundation For The Carolinas convened the Workplace Giving Task Force in September, 2009 the aim was to understand four unaligned interests and recommend a way to maximize outcomes for all four (see Section V). In the process, our work has also resulted in recommending a way forward for Charlotte-Mecklenburg’s two workplace campaigns – Arts and Science Council (ASC) and United Way of Central Carolinas (UWCC) – and the workplace sites who host annual campaigns. At the time, there were compelling reasons to “invite to the table” representatives from these organizations. Over time, national trends in giving, as well as changes in Charlotte’s workplace campaign environment, had begun to have an impact on workplace giving. However, it took a dramatic convergence of events in September 2008 to get the community’s attention. 2008 witnessed a significant decrease in UWCC’s fall workplace campaign, and ASC’s, which followed in early 2009, with resulting cuts to affiliated community agencies.

Like the rest of the country, Charlotte experienced an economic downturn in the fall of 2008; however, it was all the more significant in the financial services industry. Wells Fargo acquired Wachovia; Bank of America shed jobs. Anxiety and worry about job security increased. A dispute over compensation with UWCC’s former CEO splashed across the front pages of the *Charlotte Observer*. The CEO’s eventual departure left UWCC temporarily without senior leadership, and the Board in disrepair. Trust in Charlotte’s venerable charitable institution was broken; the UWCC campaign plunged from \$45.7 million in 2007 to \$31.3 million in 2008. ASC’s campaign, coming on the heels of the events of the fall and a further drop in financial markets, also declined from \$11.4 million to \$7.3 million in 2008.

The “perfect storm” of 2008 – and the events leading up to it - created the opportunity for the eventual creation of the Workplace Giving Task Force, whose recommendations are the subject of this Report. However, before turning to recommendations, we examine the conditions that contributed to the perfect storm: the economic downturn, corporate changes, trends in philanthropic giving, local governance and leadership issues, and, finally, the transition in community leadership style. We suggest that all of these factors, to a greater or lesser extent, led to the decline in 2008 ASC and UWCC workplace campaigns - and thus to the work of the Workplace Giving Task Force.

b. Economy and Demographics

i. Rapid Growth

According to the Charlotte Chamber of Commerce’s report, *Benchmark Charlotte 2009*, approximately 1.653 million people lived in the Charlotte region in 2008, representing an annual population growth rate of 3% from 2000. Thanks in part to a robust economy generating opportunities, Charlotte attracted thousands of new residents a year. Average

annual job growth was 13,086 per year from 2000 to 2008. The downturn of 2001 barely made a mark in the local economy. However, Charlotte's economy hit the brakes in the fall of 2008.

ii. Sudden Downturn

Statistically, 2008 marks a watershed for the Charlotte economy. To cite just a few statistics, the Charlotte Metropolitan Statistical Area (statistical area comprising Charlotte, Gastonia, Concord and neighboring SC counties) experienced the following during the recent economic downturn:

- Unemployment increased from a rate of 4.6% in September 2007 to 6.7% the next year and to 11.8 % in September, 2009. According to the Bureau of Labor Statistics, unemployment exceeded 12% by the end of 2009.
- A 12% unemployment rate translates into over 100,000 citizens in the Charlotte region who are out of work and actively seeking employment.
- With a labor force growing at 3.2% annually and job growth at 1.7% annually (2008), job seekers continue to outpace jobs available.

Employees out of work result in a drop in household and disposable income. To state the obvious, employees out of work no longer are able to participate in workplace campaigns. An interviewee in the utility industry observed that his company's campaign could not be "as extensive as it used to be," because the regional and middle managers who used to provide on-site workplace campaign leadership are "simply not there anymore." Like this utility, many employers in the Charlotte region have shed jobs in the past several years.

Lower household income strains individuals and families. Many families are one paycheck away from disaster. Clearly, the well-being of Charlotte's citizens has been impacted in many ways, for example:

- The county's high school graduation rate dropped 10.7% to 66.6% in 2007-08 from 2005-06, according to the *Mecklenburg County Profile, 2009*, published in conjunction with the Charlotte Regional Indicators Project by UNC Charlotte Urban Institute.
- 7.4% of county families lived in poverty in 2007, a 12.9% increase from 2000.

The statistics, above, paint a realistic picture of the Charlotte region's recent economic challenges. While important, economic facts are only one factor in the mix. According to the *2008 Citistates* report sponsored by the UNC Charlotte's Urban Institute, there are other trends to note, such as how the region welcomes newcomers:

Charlotte is proving itself a 21-century magnet for aspiring young professionals, for high-end bond traders with European experience and Mexicans with sixth-grade educations who are building the city's new skyscrapers. It is now one of the United

States' top immigrant 'gateway' cities. But there's a heavy measure of anti-immigrant sentiment in the region. Will diversity remain a strength, helping the region become more entrepreneurial and resilient? (Johnson, September 20, 2008)

There is more diversity in Charlotte than ever before. There are more people moving to the region in search of employment; people who have no connection to Charlotte's "traditions" and "norms." There are more people than ever who work from home and who rarely – if ever – step into Charlotte's Uptown business district.

The economic downturn that struck in 2008 abruptly put the brakes on Charlotte's seemingly endless boom. The impact to the workplace campaign is clear: if still employed, Charlotte's average corporate employee may be inclined to give less, or not at all, out of legitimate concern about the economy and job security.

c. Demographics and Leadership

i. Decentralized and Diversified Workforce

As stated above, economic factors are but one important piece of the puzzle. According to our interviews and to external research, there are also underlying trends in philanthropy and the worksite itself that have contributed to the changing paradigm of the Charlotte workplace campaign. These factors will be treated in greater detail in Section VI, but a brief discussion will introduce the factors at this juncture. At the same time, natural evolution in Charlotte's community leadership has taken place, with newer forms of civic leadership yet to emerge.

Charlotte is a different city than it was ten or fifteen years ago. The community leaders who led during the "golden age" of Charlotte have retired, and some have since died. A new paradigm of leadership, if it has been developed, is far more dispersed across our more diverse community. "Charlotte is very transient and suburban," remarked one interviewee, "How do we meet people where they are?"

People interact in a variety of ways. For example, younger employees utilize social networks such as Twitter and Facebook to communicate. Rather than resident in a traditional office, more and more employees are telecommuting by working from home offices. For a workplace campaign organization which has relied heavily on traditional communication (e.g., speeches) in a "traditional" geographic footprint of corporate Charlotte (the area around Trade and Tryon Streets), this is a new paradigm, indeed.

There is a good bit of nostalgia for a period in Charlotte's history when corporate, government and community leaders were united in their vision in helping Charlotte achieve "greatness." Indeed, there was a small group of leaders who could command the respect of the whole community and efficiently get things done. However, times have changed.

ii. Global Corporations

Many of the corporations in Charlotte now have global operations. As such, it makes it very difficult for leaders of the company to also be leaders of the community, if for no other reason than lack of time in Charlotte because of the need to attend to affairs all over the country and the world.

iii. Retirement of Leaders

Finally, but not least, is a perceived change in Charlotte's civic leadership, which factors into the changing environment. There was a day when a "call from Huger McColl" got things done in the city. Certainly, McColl and other such leaders formed a small, powerful, and "benevolent" group who had Charlotte's community interests in mind in their philanthropy. Like everything else, that day has passed. There are surely new leaders emerging with new corporate and civic leadership. However, this new leadership will be characterized by "distributed" power. Interviewees have suggested that this new leadership will operate with a collegial bent, and include leaders from many geographic areas, ethnic and cultural backgrounds and from outside the corporate sector, such as Charlotte's churches, higher education and other nonprofit sectors. Charlotte no longer is of a size to make it reasonable to assume that a small group of people are able to represent the interests of the whole community.

d. Communication Challenges

i. Value Proposition Unclear

Many interviewees cited a "lack of connection" with individuals and donors during the workplace campaign. While employees themselves have different expectations of engagement in corporate philanthropy, work sites have also changed. As mentioned above, Charlotte's corporate footprint has changes immensely over the past ten to fifteen years. From Iredell County in the north to Gastonia in the west, the Concord and UNC Charlotte campuses in the east and Ballantyne to the south, potential workplace campaign partners stretch over a wide geographic area.

ii. Scandal at UWCC

It must also be acknowledged that a public scandal at UWCC, and, to a lesser extent, a leadership vacuum at ASC, contributed to a significant change in attitudes towards these federated organizations. More than one interviewee commented on the very public way the departure of UWCC'S former Executive Director unfolded in the media. Many involved in workplace campaigns, such as employees of Mecklenburg County

Government, expressed outrage at the former Director's salary level and benefits. This did not help build trust.

iii. ASC Leadership Transition

ASC, while fortunately not touched by scandal, endured a period of time without a director – and a development head - at the helm. ASC struggled through its early 2009 campaign season with a recently hired development head not experienced in leading a workplace campaign organization. She left the organization immediately following the 2009 campaign and was not replaced. Scott Provancher, ASC's new director, came on board summer 2009 and is in his first campaign with ASC in early 2010.

iv. Concentration of Donors

For years, many felt that UWCC and ASC catered to Charlotte's largest corporate donors – Bank of America, Duke Energy and Wachovia – at the expense of the individual donor. For example, a Bank of America executive observed that of the 180 executives who moved from Bank of America to GMAC, not one of those executives gave to UWCC in 2009. Why? Her conclusion is that they felt absolutely no compulsion to give to United Way: it was something that they were expected to do before, and when the corporate expectation diminished, they no longer gave. On the other side of the coin, UWCC executives state that in the absence of donor contact information, they were unable to reach out to these individuals personally when they learned that GMAC chose not to incorporate them into a workplace campaign due to the worsening economy.

In addition to the hope for a broader representation of corporate entities in workplace campaigns, the employers and employees have spread themselves over a larger geographic area. Southpark, Concord, Gastonia, Rock Hill and Monroe, to name just a few, have gained huge numbers of employees. Even those who work for employers with large Uptown Charlotte presences do not feel as connected to the workplace campaigns.

v. Changing Expectations

Not only has the footprint changed, but so has the nature of the businesses. Former Charlotte-based corporations have grown into global businesses, changing the dynamic of corporate philanthropy. One Bank of America executive estimated that whereas 80% of the corporate executives were located in Charlotte ten years ago, today only about 15% are here today. With global reach comes national and even international philanthropy. As a result, several of Charlotte's largest corporate philanthropic partners operate from a base of a national workplace campaign platform, harmonizing giving across many geographic markets.

1. *New Opportunities for Donor Control:* Employees increasingly have a great deal of control and specificity regarding their donations. Web sites such as kiva.org allow a donor to choose the amount of money to give, the country in which to give, and the particular need to which to give. For example, a donor with an interest in young girls in Afghanistan can choose items such as a \$35 donation to equip a classroom or \$50 for school uniforms, among others. These and other opportunities make donors less likely to give to an unrestricted campaign with choices in the hands of other volunteers.

2. *Community Expectations of Participation:* For many years, peer pressure to give to ASC and UWCC was very high. In the 1980s, the *Charlotte Observer* published a satirical board game. It was intended to show how to get ahead in Charlotte. Failure to give to ASC and UWCC caused a player to back up several spaces on the board and lose a turn. Because of changes in demographics and culture, that level of expectation does not appear to be as strong.

Report of the Workplace Giving Task Force

V. Recognition of Unaligned Interests

a. Introduction

i. Streamlined Campaigns

ii. Employee Choice

iii. Nonprofits Want Access

iv. Unrestricted Gifts Necessary

b. Alignment of Interests Possible

V. Recognition of Unaligned Interests

a. Introduction

As we began the work of the Workplace Giving (WPG) Task Force, it immediately became clear that even among the workplaces represented by those seated around the table, there were divergent and sometimes competing interests in workplace giving. We observed these “unaligned interests” as the following:

- Employers want streamlined campaigns;
- Employees want more choice;
- Other nonprofits seek access;
- Unrestricted gifts are critical to ASC and UWCC.

Our job was clear - we would test the influence each of the unaligned interests had on the delicate donor-community-worksite balance, as well as the extent to which each component contributed to the ultimate aim of maximizing benefits for the Charlotte community. We knew that there was a chance that our analyses would make a case for continued non-alignment of these interests. In other words, at the outset, we did not know whether there would be a clear way to align the above interests, or if their alignment was necessary to the best result for the community.

The result of testing these hypotheses proved illuminating – and influenced our final recommendations greatly. Overall, we learned that there were many interpretations of the above, and the answer depended on employees’ or employers’ understanding of the purpose of the workplace campaign. Is the purpose of the campaign to benefit the local Charlotte nonprofit community or is to provide employees a convenient vehicle for enabling personal philanthropy? Where does the employer’s philanthropic strategy fit in the picture? How strong is the workplace’s desire to allow access to other nonprofits during a workplace campaign? Who are those nonprofits? To what extent do ASC and UWCC rely on unrestricted gifts from local workplace campaigns?

Our findings hinged on those questions. Below, we unpack the four components of our unaligned interests.

i. Streamlined Campaigns

While it is true that all workplaces – and workplace campaign organizations, for that matter – would agree that effective and productive workplace campaigns are a benefit to all, we stumble over the definition of “streamlined.” What does a streamlined campaign look like? For some, it means that the campaign is as short as possible, with minimal

disruption to daily work. For others, streamlined means that there is one campaign, combining the traditional United Way and ASC workplace campaigns with others. For example, Carolinas HealthCare System chose to combine the campaigns of UWCC and ASC with their own in-house campaign, the Children's Miracle Network, into a single workplace campaign in the fall.

Many Charlotte workplaces have streamlined workplace campaign *processes*. Like Bank of America, they have done so by converting the pledge process from a paper to an electronic one, handling pledging and some campaign communications by email. Workplace hosts discovered that automating the process does streamline the workplace campaign, yet the "donor-to-donor" ask remains an important component of the campaign.

Bank of America's recent movement to more electronic interaction in their workplace campaign is an interesting example. According to a recent United Way workplace campaign chairperson, it is "easier to connect with the donor" via an on-line system, especially if the donor is given the opportunity to opt-in and provide a personal email address for later communications. However, this chairperson observed that the "grassroots was very localized" - meaning that, in his opinion, a successful campaign still requires the "personalized ask." He suggested that it was still very important for the campaign leaders to "walk the floors and connect with people" during the campaign.

Indeed, according to the 2009 *Significant Gifts: Where Donors Direct Their Largest Gifts and Why* study conducted by the Center on Philanthropy at Indiana University, "people give to people, and especially to people they know." In a survey of 8,300 donors, this study found that donors give 19% more when asked to give by someone they knew; for religious organizations, the average donation was 42 % higher.

In interviews, we discovered that workplace campaign hosts lean toward a definition of streamlined campaigns as ones that "make sense." In other words, they seek campaigns that deliver value to the workplace through streamlined and smart *processes* – which is not necessarily the same thing as a shortened campaign. Overall, workplace campaign hosts seek high value in the workplace campaign experience, not necessarily a short campaign.

ii. Employee Choice

Employee choice proved to be a difficult matter to pin down. On the one hand, and in the abstract, the notion of having more choices would seem to appeal to our post-modern, baby-boom and post-baby boom generations. Observed one consultant, "Baby boomers resent being told what to do." Baby boomers comprise about 70% of the current workplace population, and the Generation X and Yers coming up behind them like being told what to do even less. So yes, it would seem that employees would demand more choice.

Indeed, a 2009 Mecklenburg County employee survey pointed to just that: 84% of the 431 employee respondents indicated that if given the option, they would prefer to have more options for giving outside of the traditional United Way and ASC workplace campaigns. However, the same survey indicated that 73% of the 507 citizens who responded to the survey recommended that County employee charitable donations should remain in the Greater Charlotte Metropolitan Area – and therein lays the dilemma.

Recent research in the science of decision making suggests that greater choice does not lead to better decisions or outcomes. Who hasn't stared at 50 choices on a restaurant menu and ordered the first thing on the menu out of desperation over the number of decisions required – and hunger? Princeton University professor George Miller provides us with scientific answers from his scholarly research in the area of decision science: most of us can handle choosing from among about five to nine items before the decision making process becomes prohibitively complicated. Columbia Business School professor Sheena Iyengar concurs. In her study of 401(k) plans, she found that the increase in number of options was negatively correlated with participation. In other words, the more options there are, the lower participation rates will be.

There are also other factors to consider in this debate. In reading through the Mecklenburg County survey, it appears that some respondents were reacting out of anger toward the then-recent leadership issues at UWCC. In essence, some respondents seemed to say, "I want choices because I don't trust the United Way anymore" – a reasonable reaction, considering the circumstances, but one with a temporary and person-based focus rather than community-based focus.

In interviews, we learned that the central issue may not be choice but one of *value*, once again. As one interviewee summarized many similar responses: "Look, I would be happy to give if they [the workplace campaign organization] would tell me where the money is going and what impact it will have on the community."

As we will discuss more in Section VIII, the overwhelming empirical evidence regarding limitless choice is clear. Greater employee choice may lead to larger overall campaign dollars, as the Mecklenburg County survey suggests. However, there is also another factor to consider. Employee choice and community-directed donations are negatively correlated – meaning that as employee choice increases, funds designated for the local community decrease. Evidence suggests that participation rates are likely to decrease, as well.

In sum, we suspect that this interest is perhaps less about "employees want choice" and more about "employees need a reason to give to ASC and/or UWCC." If this is true, then we believe that if the case can be made – and communicated to the employee - for the value of giving to ASC or UWCC, the "issue" of employee choice may be less of an issue or might not be an issue at all, in the end.

iii. Nonprofits Want Access

Without a doubt, there are many other charities that seek access to the workplace for the purpose of raising funds - for the obvious reason that workplace campaigns are still an effective means of fundraising. Individual charities seek access, but there are also new organizations representing multiple charities that propose themselves as alternatives to the traditional United Way campaign. Called "Alternative Funds," or AF's, for short, these are funds that seek charitable donations for members. For example, AFs such as Earth Share, the charity that pools donations for environmental causes, or the American Cancer Society, seek to make the case for having access to Charlotte's workplace campaigns. Said one interviewee, "We get bombarded by many groups seeking access."

According to the National Committee for Responsive Philanthropy in its 2007 report, *Charitable Fundraising in the Workplace*, AF's providing support for environmental, social justice, economic development and health issues receive about 70% of AF donations. However, AF donations make up a very small portion of all workplace contributions. In a 2003 study it was estimated that AF donations totaled approximately less than 10% of all United Way workplace campaigns nationally.

Of potential partner AFs, it is important to explore where donations are being allocated after collection by the AF – and, in particular, whether they remain in the community or not. Again, according to the above report, while there is not conclusive evidence regarding the percentage of AF dollars remaining in the local community, there are some trends worth noting. It is true that there are some AF's who are strongly aligned with national movements, funding policy and research at the highest levels. Many of these funds have a strong advocacy component, which might lead to funds allocation toward state and national lobbying efforts.

According to our interviews, we learned that there are some workplaces that prefer to limit the number of workplace campaigns. Some have a strong philanthropic reason to do so: for example, realtor Allen Tate decided that the platforms espoused by ASC, UWCC and "MeckEd" aligned well with Allen Tate's own business and philanthropic interests – and so have limited their workplace campaigns to three, separate and single purpose campaigns. Other Charlotte-area workplaces limit their interaction to ASC and UWCC to keep things simple. They believe that once the floodgates are opened to all, there will be no limit to solicitations.

In sum, it is evident that other nonprofits seek access to workplace campaigns. However, it is also clear that opening a workplace campaign results in increasing numbers of charities and AF's for the workplace to manage. Moreover, in the absence of hard data available about AF funds distribution, it is our assumption that if a workplace chooses to invite an AF to participate in a workplace campaign, it would be incumbent upon the workplace to investigate whether the AF's funds would be allocated locally or elsewhere.

iv. Unrestricted Gifts Necessary

Finally, our fourth unaligned interest stems from the funding needs of Charlotte's own workplace campaign organizations: ASC and UWCC. First, let it be stated that all gifts to ASC are unrestricted by definition. ASC assembles volunteer grant panels to carefully review grant applications from Charlotte Mecklenburg's arts, culture, history and science organizations. Funds are allocated based on careful attention to balancing the sector's needs with the many requests that are before the panels.

By contrast, UWCC allows designation of gifts. However, to the extent that donors give without restrictions, UWCC's Community Care Fund (CCF) benefits. CCF funds are allocated by highly trained and dedicated volunteer panels who provide grants to 96 health and human services in a five-county region. These partners undergo a rigorous review process to assure donors that funds are being used in the most productive and efficient way, to the benefit of education, financial stability and health needs in the local community. "Resources under Management" (RUM) measures the total amount of funds that a local United Way has to allocate to local agencies (as opposed to those that are designated by donors to particular organizations).

b. Alignment of Interests Possible

To review, the results of our interviews and research about the four unaligned interests yielded the following, presented in table form below.

Interest	Finding	Implication(s)
Employers want streamlined campaigns	Employers seek smart and value-added workplace campaign <i>processes</i> , not necessarily “shorter” or combined campaigns	Campaigns should seek to provide high value workplace campaign experiences in partnership with hosts
Employees want more choice	Employees seek a reason to give to ASC and/or UWCC; they want choices when the traditional “choice” is no longer desirable or they feel coerced into giving	Campaigns should communicate the value-add “case” for giving; Workplaces have a role to play in helping donors differentiate between community and personal philanthropy
Other nonprofits seek access	Yes, this is true given the workplace campaign is a productive means of fundraising; however, concerns about the diversion of funds from the local community and rise of cost/complexity urge caution	If a workplace invites other charities to participate in their workplace campaign, they should investigate whether funds will stay in the local community and consider the cost/complexity of increasing the number of campaign partners
Unrestricted gifts are critical to ASC and UWCC	Yes, they are the mechanism to address local needs in a highly effective manner	If unrestricted gifts decline, there is less money available to allocate to local community needs

After a considerable amount of research, analysis and group discussion, the Task Force concluded that it is possible to align the four interests, above. To align the above interests, the workplace host would sponsor three separate workplace campaigns: a UWCC-only campaign, an ASC-only campaign and a third campaign with other partner(s) of the workplace’s choosing. The advantages of three separate campaigns are the following:

- Maximize funds to local community needs;
- Offer choice to employees;
- Give access to other nonprofits;
- When run well, result in less complexity.

However, some workplaces may not find it necessary or even desirable to seek to align all four interests. In that case, we urge the workplace to follow strategies that maximize the revenue flowing to ASC and UWCC – and, as a result, to the local community.

Report of the Workplace Giving Task Force

VI. Local and National Trends and Best Practices

a. Local Trends

- i. FY09 Results**
- ii. Trends**
- iii. Models**
- iv. Interviews**
 - 1. Community Focus**
 - 2. Suggested “Fixes”**

b. National Trends

- i. FY09 results**
- ii. Trends**
- iii. Models**
- iv. Interviews**

c. Peer City Review

- i. Introduction**
- ii. 2008 United Way Comparisons**
 - 1. Cincinnati Profile**
 - 2. Louisville Profile**
 - 3. Dissimilar Cities**
- iii. United Arts Campaigns Trends**

d. Best Practices

- i. Communicating a Strong Message**
 - 1. The Message**
 - 2. The Messenger**
 - 3. Means of Communication**

- ii. Managing a Well-Maintained Campaign Process**
- iii. Staying in Touch with Donors Continuously**
- iv. Beyond Workplace Campaigns**
 - 1. Youth Venture**
 - 2. Social Fellows**

VI. Local and National Trends and Best Practices

a. Local Trends

i. FY 09 Results

Total campaign receipts at UWCC declined by 37% in fiscal 2009 and 33% for ASC.

ii. Trends

Charlotte has been a “place apart” in some sense – the traditional workplace campaign remained strong and a cornerstone of the Charlotte philanthropic landscape, while many other communities have already changed their approach.

Workplace campaigns in Mecklenburg County were characterized by a few major corporate givers and worksite campaign hosts. Because of the prior success of ASC and UWCC, they had little reason to change their messages or methods.

After the Perfect Storm of 2008, all kinds of issues emerged: lack of connection with the donor, lack of value-add messaging and communication, lack of continuous donor relationships and messaging outside the campaign period, little to no donor recognition, and constricted geographic and business sector reach.

The changing leadership of Charlotte, including “democratization” of Charlotte’s decision-making processes, makes for diffuse leadership and difficulty building a consensus for how to address issues in workplace campaigns.

iii. Models

Interviews revealed that many workplace campaign hosts do a tremendous job in hosting successful workplace campaigns and have very promising models to follow. For example:

- Family Dollar does a good job in “getting arts out in front of people” during the ASC workplace campaign. For example, they sponsor an employee and children’s art contest and cake decorating contest; invite musicians and performers and host demonstrations from Discovery Place, the Raptor Center and a gallery crawl in NoDa.
- CHS campaign: “You make good things happen.” “Had fun” with combined campaign: “change can be good.” “Our guys are fired up and excited... “already started planning next year’s campaign.”

- Wells Fargo Stagecoach arrived at the Wells/Wachovia United Way kickoff event; free access to arts events for employees during ASC campaign and live performances in the Atrium.
- Vanguard experienced an increase in participation due to constant communication during campaign, being clear about community needs, having fun and sponsoring special events to connect donor.

iv. Interviews

As part of the Task Force’s work, we conducted interviews with a large number of local workplace campaign hosts, including corporate and government sites. In addition, we interviewed United Arts and United Way leaders in many cities: Boston, Los Angeles, Atlanta, Cincinnati, Louisville, and Seattle. We spoke to experts at national organizations and experts in the field of social entrepreneurship. In sum, we cast a wide net (see Appendices for complete list of interviewees). We asked two primary questions: (1) What is the place of the ASC and UWCC workplace campaign in the Charlotte community? and (2) What “best practices” do comparable arts funds and United Ways employ in other cities?

The interviews were very helpful, indeed. Overall, interview results suggest that the workplace campaign has played a significant role in the fabric of Charlotte’s philanthropic landscape. As times change, it appears that the workplace campaign has the potential to contribute in a significant way to generating funds for Charlotte’s nonprofit sector. Many urged “not to throw the baby out with the bathwater.”

At the same time, however, interviewees encouraged ASC and UWCC to take steps to communicate the value that their federated campaigns provide the community. Many, many comparable organizations around the country are finding that communication about the “value-add” is crucial. Moreover, best practice suggests that a workplace campaign organization would do well to focus on a relevant and important community-specific issue – and put its efforts behind building community-wide collaboration and support.

Interviewees urged ASC and UWCC to seize the opportunity to “identify some new champions” by “look[ing] outside the company and inside the community.” This is an appeal to the entire community and therefore will “need visible leadership across the city.”

Below, we discuss results from our Charlotte community interviews.

Overwhelmingly, the response we heard is summarized by the following comment: “Fix the workplace campaign, but do not ‘throw the baby out with the bathwater.’” When the workplace campaign is understood as a “means to an end” and not an end in and of itself, the above statement makes sense. Many cited that the workplace campaign is the most efficient – and, when run well, effective – means of reaching a large number of the community’s citizens and engaging them philanthropically and civically.

In addition, we learned that many employees value the relationship the workplace campaign provides to the local community: “I still see it [the workplace campaign] as the most efficient

way to give to charities.” The fact that there are many groups happy to replace UWCC or ASC in a workplace campaign bears witness to this assertion.

We heard the following themes - captured below in quotes - which will be discussed in this section in more detail:

1. Community focus: “It’s not about the United Way or ASC, it’s about the community...mistakes were made, but who is this [workplace campaign] really about?”
2. Fixes to the model: “We do believe in the workplace campaign. But it’s time to fix the model.”
3. Promising practices among Charlotte’s workplace campaign hosts: “When you allow people to give where they have a passion, then they will give”

At the end of the day, results from the interviews were very encouraging. We heard loud and clear that there are needed and necessary “fixes” to “sharpen the tool” that is the workplace campaign. At the same time, however, we understand that the majority of Charlotte’s business and civic leaders support the workplace campaign as an effective means of community fundraising. Moreover, we learned that most workplace hosts seek to partner with ASC and UWCC to make the most of this effort to the benefit of the Charlotte community.

1. Community Focus: Many interviewees would agree with the following comment: “It’s time to say collectively, it’s never going back, we’ve got to move forward, what is it that the broader community wants to do?” We learned in interviews that it goes both ways: the larger community must be engaged, as well as educated about what needs to be done for the good of Charlotte. Interviewees see the dilemma that “not giving [to ASC and UWCC] punishes more [innocent] people” but employees “don’t get the leap from ASC/UW to individual agencies” and the people that those agencies serve.

In a sense, the sum of the interviews on this topic points to the leadership task that is before ASC and UWCC. Many interviewees, who themselves are Charlotte’s corporate and community leaders, know that a “thriving arts and health and human services sector makes for a compelling community.” They are close to the pressing issues of unemployment, homelessness and declining school budgets for arts education in our community. They look to ASC and UWCC for leadership in their respective purviews.

Said one interviewee: The question comes down to this: what purpose does ASC and UWCC serve – or should serve - in the Charlotte community going forward?”

The answer, at least based on our interviews, suggests a convener and leader role for ASC and UWCC in the community: “Conveners in places where people can come together in a de-politicized fashion.”

Many see these two organizations as being in a unique position to bridge sometime disparate groups in the community and convene them “around the table” to tackle some of the most pressing problems in our community. “Connecting the sectors...so many players (e.g., churches, agencies, government)...how can we get on the same page?”

To do so requires ASC and UWCC to engage in new types of activities. They will have to build new relationships, and develop an informed point of view about community needs and their capacity to address them. “They have to own their responsibility to the community, have to educate them.” There is a sense that there will be new leaders emerging in Charlotte, as some of Charlotte’s venerable civic leaders pass the torch.

Interviewees urged ASC and UWCC to direct energy toward “changing the paradigm”: What compelling community issue should and can a united group of Charlotte’s business, nonprofit, government and civic leaders get behind to change the face of Charlotte in years to come? How will we do this? It will also take a larger coalition: “Getting the media, the mayor involved: we have a problem. It’s a perfect time to bring people [together] around a cause.” Many urged ASC and UWCC to educate the community about what needs to be done for the good of Charlotte, e.g.:

- “Great to have some kind of social community report”
- “Give us the information, tell us how and what we can do”

In doing so, interviewees believe that when there is excitement about the workplace campaign – and the focus is squarely on the community recipient - positive results usually follow. “When you allow people to give where they have a passion, then they will give.”

When asked for the compelling issues facing Charlotte, we received a number of answers. Typical responses included:

- “Education is a big challenge;”
- “Dropout rate continuing to rise...need a trained or a trainable work force;”
- “Number of homeless and poverty-stricken children served by CMS increasing;”
- “Population continues to become more diverse;”
- “City of neighborhoods that do not intersect;”
- “We don’t see the poverty.”

2. Suggested “Fixes”: Through interviews, many recommended “fixes” to UWCC and ASC’s workplace campaign model, including the need to make the campaign more “customer-centric” and adapted to individual workplaces.

Establishing people-to-people connections through greater segmentation and strategic communication would go a long way toward communicating ASC and UWCC’s value to the community – and the case for why a donor should give. “Giving because the company tells you to give doesn’t work anymore.”

People-to-people connections are all the more important among younger donors: “routines begin to break down...if you are 35 and younger, you’re looking for a reason to give...it has to do with you.”

Interviewees urged both UWCC and ASC to engage in continuous communication: “Only time we ever hear about ASC and United Way is one time during the campaign.”

There was a divergence of opinion about whether campaigns should be “closed” or “open” – which was highly dependent on what the interviewee’s worksite had chosen to do. Some interviewees indicated that change is good. They believe that allowing employees some discretion in giving encourages them to take ownership – and to give to something they are passionate about. On the other hand, there are those who feel that “opening” the campaign is going too far: “Open campaigns confuse the issue about what makes the difference.”

The concentration of donors and beneficiaries was in question. Some ask: “if I don’t work in Charlotte, why should I give?” or conversely, “if I work in Charlotte but live elsewhere, why should I give?” Some pointed to the seemingly small number of corporations and individuals “bearing the burden” for all as being unfair.

- “Why are 100,000 people carrying the burden for 800,000?”
- “45% of de Tocqueville givers (UWCC) work(ed) at Bank of America or Wachovia”
- “There are a huge number of people who don’t give anything at all...everybody is too reliant on 3-4 organizations in town.”

To that end, interviewees urged ASC and UWCC to reach beyond the geographic boundaries formed by “Trade and Tryon” – Charlotte’s downtown business district – to worksites located elsewhere in Mecklenburg County, such as the University area, Davidson/Lake Norman and the Coliseum area. For example, Family Dollar finds it “more challenging” to make the connection with United Way, given the company’s headquarters location outside Uptown, whereas most of Family Dollar employees live in Union, South Mecklenburg and York (SC) Counties.

ASC

Interviewees praised ASC for the unique role it plays in the Charlotte community. Indeed, Charlotte is one of the few cities in the country to have such a large and vibrant united arts organization.

However, interviewees also recognize some of the unique challenges ASC faces. Arts can be perceived as “highbrow” by a community. At the same time, it can be difficult to establish a clear link between donating to the arts and culture sector and the resulting benefits to the community – even for those who are not interested in the “arts” as traditionally understood.

Interviewees cited some particular observations about ASC:

- Lack of “good old-fashioned” messaging, celebration and thanks
- Vague understanding of the “product” and why it matters to the individual donor
- Unclear link between giving to ASC and benefit to individual arts and science entities – and benefit to the community
- Heavy – and almost exclusive – reliance on the workplace campaign, which has led to ASC becoming an “efficient collection agency.”

As we will learn later in this report, ASC is well aware of the above observations, and is already taking steps to actively address each one.

UWCC

United Way of Central Carolinas came under heavier criticism in our interview process. Part of the reason has to do with the very public events surrounding the departure of its former CEO in late 2008. As a result of the decline in the 2008 workplace campaign, UWCC was compelled to decrease funding for certain recipients, which again played out in a very public manner in the media. Since that time, UWCC has been and is taking steps to build trust with the public, as well as with its donor community.

In our interviews, the overwhelming response was: “It’s all about communication,” which is evident in the observations, below:

- “Weak relationship with the individual donor;”
- “Lack of thank you;”
- “Didn’t stay in touch year round;”²
- “Unclear link between giving to United Way and benefit to individual agencies and community impact.”

Interviewees cited transparency as a key operating procedure going forward: “What is a clear and simple statement about funding transparency?”

Some point to the “largeness” of the United Way that impedes individual connection: “The large umbrella of the United Way doesn’t give them [employees] a real picture...need ‘feet on the street’ ...got to reach people’s heartstrings”

- “It’s so big...we lose sight of what supporting community needs really means;”
- “We need a message that is smaller...who it [the workplace campaign] touches, where it makes a difference?”

² Both the UWCC and ASC have had difficulty connecting to donors individually because of two major factors. First, many workplace hosts do not provide names of individual donors. Second, each has tens of thousands of donors and the sheer magnitude of numbers makes it difficult.

As stated previously, many workplace sites would be delighted to partner with the United Way to customize a campaign that fits the corporation's needs. Hosts are asking for help in executing their campaigns: "Need more marketing support. We would love a 'campaign kit' that gives us talking points, 'Did you know?' pieces."

Workplace hosts expect UWCC to be knowledgeable about their corporate priorities around philanthropy. They seek a much more personal connection: "Make connection with the agencies and grants recipients...have to hook people."

Clearly, it is a new day in Charlotte's philanthropic sector. Interviewees – as well as UWCC – are well aware of the challenges that the organization has faced in recent years. However, there is a degree of optimism present as UWCC's new CEO, Jane McIntyre and newly re-constituted Board of Directors move forward to face the road ahead. As noted later in this report, UWCC is already taking steps to sharpen the workplace campaign, and also to move beyond it.

b. National Trends

i. FY09 Results

Results varied across the country, but few campaigns were hurt as badly as ASC and UWCC. In fact a few managed to remain flat, rather than declining (see the charts on pp. 57-58).

ii. Trends

1. Corporate Philanthropy: To say that the landscape in corporate philanthropy has changed would be a gross understatement. With major global corporations well represented in the local business community, Charlotte is no stranger to this trend. Corporate approaches to philanthropy are moving from the scattershot of "pet projects" to the more sophisticated realm of global partnering where benefits to society intersect with benefits to the company. Corporations are increasingly taking a "brand management approach" to philanthropic strategies, concentrating efforts and developing analytics to measure and build a deep understanding of the benefits. Building the brand management case has led to many creative approaches, such as global partnering and cause-related marketing, all under the rubric of corporate social responsibility ("CSR").

CSR aims to focus on key areas of impact shared between business and society. It seeks to enhance a company's standing in the community and larger public – as well as enhancing brand – while at the same time publicly addressing areas of social concern. For example, consider the consumer goods giant Unilever, who, through its Lipton unit, is the largest buyer of tea in the world. Concerns about tea supply led Unilever in Kenya to launch a comprehensive program aimed at improving productivity through sustainable practices. As a result, premiums paid through the program increase Kenyan farm revenues, while Unilever enhances its corporate image and safeguards its supply chain.

According to the December, 2009 report, “Making the Most of Corporate Social Responsibility” in the *McKinsey Quarterly*, the authors observe that some leaders have started to look at it [CSR] as a creative opportunity to fundamentally strengthen their businesses while contributing to society at the same time. They view CSR as central to their overall strategies, helping them to creatively address key business issues. (Keys, December 2009)

The Center on Philanthropy observes this trend, as well. In a May, 2007 report, *Corporate Philanthropy: The Age of Integration*, its researchers conclude that the landscape has indeed changed. They observe that the corporate sector seeks to receive “something back” from its philanthropy, above and beyond goodwill. Corporate giving will increasingly be characterized as being “focused, proactive, and results-oriented.”

In a way, we might compare the emerging environment in corporate philanthropy to a vendor relationship. When choosing among potential vendors, a corporation conducts due diligence: does the potential vendor offer the highest quality product for a fair price? Will they be trustworthy partners? Will they customize their product for us? How will we evaluate the vendor’s performance using fair, transparent and meaningful measures?

Many larger corporations with multiple – and even global – operations craft a company-wide philanthropic strategy, in the same way that Unilever concentrates its efforts on global food production. While there is room for local adaptation, it is also clear what the company is “about” in its philanthropic strategy. For example, it is not surprising that financial institutions Wells Fargo and Bank of America focus attention on issues that impact the communities in which they serve, including financial stability, low-income housing, and supporting public education. Charlotte-based realtor Allen Tate made a similar decision in choosing to support “MeckEd,” Mecklenburg Citizens for Public Education, as one of its three philanthropic partners.

Another trend, employee engagement (e.g., volunteerism) is critical to the future of fundraising. Many employees, especially those among the younger generation, seek meaningful engagement with issues that they care about. Employers such as Wells Fargo and Bank of America – among many others - allow employees to devote a portion of their working time on a monthly basis to hands-on engagement with community partners. Some employers provide “loaned executives” to a nonprofit to assist with a particular business problem. For example, loaned executives can be instrumental in Board development, financial analysis and stability and developing a marketing program.

2. Nonprofits: Interviews conducted with United Way and United Arts Funds colleagues from all over the country proved to be very helpful. What we learned is that reliance on workplace campaigns as the sole source of revenue generation has become a thing of the past for most. We observed an interesting geographic divergence: nonprofits on the West Coast, and especially in places such as Seattle and Los Angeles, have very little workplace campaign activity as compared to places in the South, like Atlanta and in the Midwest, such as Cincinnati, where there is a heavier reliance on workplace campaigns.

No matter the location, nonprofits everywhere are moving, or seek to move, to an “impact” model – one in which the nonprofit concentrates on, measures and reports its impact on a particular social issue. For example, the United Way of Greater Los Angeles (UWGLA) concentrates its work on “Building Pathways Out of Poverty.” As a result, everything in the organization, including its research, media communications, public appearances, grants allocation processes and partnerships are aligned to support the initiatives chosen to alleviate poverty in the Greater Los Angeles area. Every year, the UWGLA issues a “report card” on its progress toward its goal.

As a component of the impact model, we see a strong trend in the funding of issues, rather than organizations, among federations. In the case of UWGLA, during the transformation to its current community impact model, hard decisions had to be made about funding.

In a similar manner, the Fine Arts Fund of Cincinnati captures the essence of impact in its “Enhancing the Arts. Embracing the Community” 2010 campaign. According to its Campaign Director, “Before we had a laundry list of what we supported and people were not responding. Now we have a different kind of message – we are defining what the arts are – and who we are - and how the arts create vibrant neighborhoods.” It took a tremendous amount of research and subsequent change for the Fine Arts Fund to make this transition. However, they are finding that the message resonates with donors: the 2009 campaign experienced only an 8.3% decrease during a very difficult financial year.

iii. Models

Many local United Ways and United Arts organizations are seeking to diversify revenue and donor engagement outside the workplace. Dubbed as “continuous donor engagement,” the aim is to meet donors where they are and in ways that interest them. For example, the Fund for the Arts of Louisville focused its efforts on building partnerships between the arts and downtown organizations. They support a partnership between a home for disabled homeless children and the Louisville Ballet to bring dance to these disadvantaged children. The Fund for the Arts targets donor interests in certain arts offerings. For example, they sponsor special pre-performance talks or “meet the artist” events for donors who indicate an interest in particular art forms.

The United Way of Massachusetts Bay and Merrimack Valley (Boston) takes it one step further: they have teamed up with social entrepreneur Ashoka to sponsor a United Way-led Youth Venture program. United Way agencies nominate young people to be participate on teams charged with proposing – and finding a way to address – community issues of their own choosing. The United Way Young Leaders are charged with mentoring and managing these entrepreneurial groups during a nine- month business development process – which culminates in a gala event at which participants present their final projects.

The Funds for the Arts of Louisville and the United Way in Boston are but two examples of the many ways that federated organizations seek to leverage donor relationship and move into wide circles in their communities.

iv. Interviews

As discussed in this section, the Task Force interviewed corporate, nonprofit and civic leaders in the Charlotte community. In addition, the Task Force cast a wide net outside the Charlotte community. We reached out to a large number of United Ways and United Arts Funds colleagues, as well as to national experts and leading thinkers in the area of social entrepreneurship and fundraising outside the workplace campaign (see Appendix A-List of Interviewees).

These leaders proved tremendously helpful in painting a picture of the workplace campaign environment in Charlotte, as well as in their respective cities. We were particularly interested in learning more about the workplace campaign culture in Cincinnati, Louisville and Atlanta – cities considered to be comparable to Charlotte. There is a United Arts fund in each of these cities, as well as a long-established United Way. Like Charlotte, there is a fairly “traditional” workplace campaign environment in these three cities. The United Ways in all three report high “Resources under Management (RUM)” rates, meaning the vast majority of funds generated in workplace campaigns stay in the community. Below we provide more detail on the results of our interviews with leaders outside of Charlotte and comparisons with peer cities.

c. Peer City Review

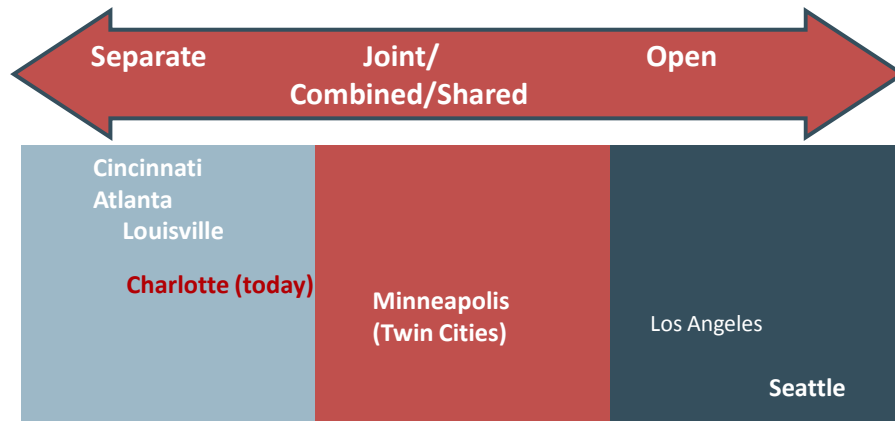
i. Introduction

As a starting point for our peer city review, we explored the workplace giving culture in Atlanta, Cincinnati, Los Angeles, Louisville, Seattle and the Twin Cities (Minneapolis/St. Paul). This analysis suggested that there is a range of how workplace campaigns operate in these cities, as well as throughout the country.

As illustrated in the chart below that shows cities by campaign type, the cities on the left-hand side of the graph are those whose workplace campaigns are predominantly “closed.” In other words, most workplace campaigns in Cincinnati, Louisville and Atlanta are single-focus closed campaigns for the local United Way and/or local United Arts federation. At the other end of the spectrum, we find cities such as Los Angeles and Seattle. In these cities, most campaigns are “open” – meaning that campaigns allow designations to any number of 501(c)(3) corporations.

Trends throughout the country affirm our finding in the Peer City Review, below. It is generally true that the further west and north one travels in the country, a workplace campaign is more likely to be open. However, in the Midwest and South, where Charlotte is located, campaigns tend to be more “traditional” and closed.

Peer City Review of Campaign Type



As a result of our research, we determined that for the purposes of our analysis, we designated Cincinnati and Louisville as “comparable cities” to Charlotte based on the following factors:

- Workplace giving dominated by a cluster of very strong and very deep corporate relationships;
- Long-term history of strong UW’s and United Arts Campaigns;
- Somewhat similar cultures, e.g., “small” big city.

Although close to Charlotte geographically, Atlanta did not make this cut due to differences between Charlotte’s ASC and Atlanta’s United Arts federation, the Woodruff Arts Center. The Woodruff Arts Center runs a fairly limited workplace campaign in a small number of Atlanta’s corporations in the downtown area. We felt that the Woodruff Art Center’s fundraising activities were sufficiently dissimilar to ASC’s to provide a meaningful comparison.

ii. 2008 United Way Comparisons

When we compare 2008 campaign results from UWCC to results from Cincinnati and Louisville (see chart below), the data provides some interesting observations. Cincinnati’s campaign results are two times larger than Charlotte’s. Charlotte reports a lower RUM rate, lower participation rate, fewer volunteers and a higher churn rate.

We drew several conclusions from this comparison. We acknowledge that 2008 was a tough campaign year all around the country – and Charlotte was reeling from the collapse of the financial services sector and UWCC leadership issues. However, when compared to a campaign of similar size, Louisville, we see the degree to which Charlotte is dependent on the workplace campaign (55.6% vs. 41.8% from corporate employees) for its “bread and butter.” It would seem prudent for UWCC to begin to look outside the workplace campaign for sources of revenue generation – especially in tough economic times.

Another important insight derives from the difference in RUM rates. In both Cincinnati and Louisville, there is a higher percentage of overall receipts that remain in the community. It would be beneficial to dig deeper to understand what these United Ways do to ensure that the maximum amount of funding stays in the local community to meet community needs.

Comparison of United Way Campaigns in Similar Cities (2008)

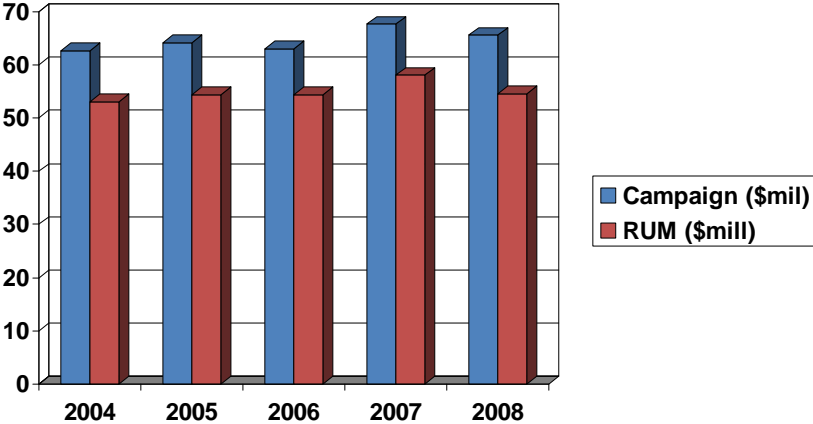
Comparison factors	Charlotte	Cincinnati	Louisville
Campaign (\$ mil)	31.3	65.5	28.8
% RUM	74%	83%	84%
% ttl from corp employees	55.6%	57.6%	41.8%
% participation	14.2%	19.8%	25.5%
Range of top ten corporate gifts	\$860,000 – \$118,531	\$12.8 million - \$345,000	\$3.2 million- \$63,000
Employment	607,746	804,746	570,060
Giving per person employed	\$51.39	\$77.04	\$49.99
Total # volunteers	6,817	22,077	13,631
Total # volunteer hrs	27,920	17,743	149,543
% Churn rates: all givers	34	8	35%
leadership givers	33	11	21
major givers	44	11	22

1. Cincinnati profile: Cincinnati resembles Charlotte in many ways: the city’s 2008 population was 1.6 million; employment 805,000. It is served by the United Way of Greater Cincinnati and venerable Fine Arts Fund. Cincinnati’s corporate landscape is dominated by consumer goods giant Proctor & Gamble. GE Aviation, Ethicon (Johnson & Johnson), Cinergy Corp., U.S. Bank and Deloitte & Touche LLP are also leaders in Cincinnati’s philanthropic community.

Cincinnati’s workplace giving climate is similar to that of Charlotte. United Way of Greater Cincinnati runs a fall combined campaign. The Fine Arts Fund starts

solicitation November 1 and kicks off in January. Both funds are Proctor & Gamble (P&G) “top heavy.” P&G contributes over \$2.0 million to Fine Arts Fund, and corporate giving to Fine Arts is 56% of total contributions. In a similar manner, the United Way campaign is typically very successful. The most recent RUM rate for 2008 sits at about 92%, one of the highest in the system.

United Way of Greater Cincinnati – Campaign results



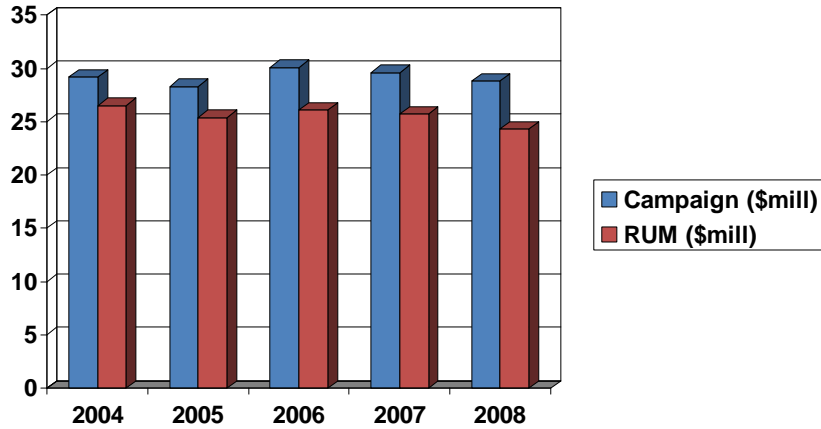
2

When asked about the trends in workplace giving, one Cincinnati leader remarked: “Every year we hear about another campaign ‘going open’.” However, given the large presence of P&G in both UW and Fine Arts Fund’s campaigns (20+%), those we interviewed expected workplace campaigns to continue to occupy a central role in community fundraising.

In fact, leaders at UWGC and the Fine Arts Fund work very closely with P&G. United Way just re-engineered its campaign with P&G, adding features such as a virtual campaign kickoff.

2. Louisville profile: Louisville bears some similarity to Charlotte. Its population is approximately 1.2 million, employment 570,000. The city is served by two federations: Metro United Way and the Fund for the Arts. Its major corporations include UPS (10% of overall campaign), GE Consumer & Industrial, Ford Motor Co., BellSouth, Chase and YUM Brands (Taco Bell, KFC).

Louisville United Way – Campaign Results



Metro United Way runs a traditional fall campaign. The Fund for the Arts joins in the fall for some combined campaigns (about 10%), but kick off in January 1 for their traditional workplace giving campaigns. Interviews with Metro United Way campaign directors indicate that they have experienced some formerly closed campaigns beginning to “open.” The University of Louisville is one notable campaign that did so in the past year. Remarked a campaign chairperson in reaction to this event: “It’s been a disaster.”

3. *Dissimilar cities:* When compared to “dissimilar” cities, Charlotte’s United Way picture appears to be a bit brighter: the RUM rate is relatively high, corporate employee participation solid and loyalty fairly stable. Based on our interviews, we attribute Charlotte’s position relative to these cities to the strong foundation of corporate and workplace giving that Charlotte has traditionally enjoyed.

It is helpful, however, to point out the Twin Cities’ relatively low churn rate among leadership and major givers. The Greater Twin Cities United Way is well-known as a leading “community impact” United Way throughout the country. As such, United Way leadership follows a program called “Consultative Selling” intentionally develop long-term corporate and individual donor relationships.

Comparisons of United Way Campaigns in Dissimilar Cities (2008)

Comparison factors	Charlotte	Atlanta	Los Angeles	Seattle	Twin Cities
Campaign (\$ mil) / % RUM	31.3 74%	91.1 75%	60.7 46%	101.8 41%	94.9 83%
% ttl corp employees/ % participation	55.6% 14.2%	51.7% 21.7%	45.6% 0.4%	45.3% 11.3%	50.5% 28.6%
Range of top ten corporate gifts	\$860,000 – \$118,531	n/a	n/a	\$16.7 million - \$271,287	n/a
Employment Giving per person employed	607,746 \$51.39	2,134,935 \$37.72	4,446,845 \$12.16	1,041,446 \$94.48	1,465,400 \$60.63
Total # volunteers	6,817	2,883	2,540	14,671	59,622
Total # volunteer hrs	27,920	17,298	14,160	179,339	27,103
% Churn rates: all givers/leadership givers/major givers	34 33 44	n/a	57 61 77	43 45 25	38 25 15

iii. United Arts Campaigns Trends

Americans for the Arts in its report, *United Arts Funds 2008-2009: United Arts Funds Campaign Update*, predicts a 9.4 percent decrease in aggregate United Arts Funds (UAF) campaign revenue during 2009, only the second decline in the past 12 years. This data is based on the 28 UAFs that have responded annually to the United Arts Fund Campaign Update since 1998. They represent \$68.9 million, or 61.8% of the \$111.5 million in the aggregate campaign revenue analysis for 2008. Since 1998, aggregate UAF campaign revenues have experienced two periods of distinct growth: 1998 and 2002.

Indeed, interviews indicate that Charlotte’s comparable cities, Cincinnati and Louisville, each saw a downturn in 2008 fundraising revenue, and were making changes in campaign strategy in anticipation of a tough year in 2009-2010. Louisville’s Fund for the Arts reports a “slight decrease” in this year’s campaign; however, at the same time, is encouraged to learn that most of its donors are able to give something rather than nothing at all.

Cincinnati’s Fine Arts Fund observed an 8.3% decrease from 2007 to 2008. However, some of the shortfall was made up by generous corporate gifts from P&G and others. The Fine Arts Fund has gone through a “huge amount of research” to create “a different kind of message about who we are and defining what the arts are.” The new messaging is about “how the arts create vibrant neighborhoods to live, work and play in Cincinnati.”

United Arts Campaign Revenue from 2007 – 2009

City	United Arts Fund	Campaign revenue (\$million)		
		2009	2008	2007
Cincinnati	Cincinnati Fine Arts Fund	12.0	12.0	11.8
Charlotte	Arts and Science Council	7.0	11.4	11.6
Milwaukee	United Performing Arts Fund	n/a	10.5	10.5
Louisville	Fund for the Arts	8.8	9.2	8.1
Atlanta	Woodruff Arts Center	9.0	9.1	8.7
New York	Lincoln Center Consolidated	n/a	6.0	6.4
Orlando	United Arts of Central Florida	4.7	5.6	5.9
White Plains	Westchester Arts Council	n/a	4.5	4.6
Hartford	Greater Hartford Arts Council	4.2	4.3	4.2
Seattle	Arts Fund	3.6	4.1	3.9

We learned in our interviews that Arts Funds in comparable cities all face challenges. As depicted graphically, below, leaders report that they struggle in “selling” or positioning the arts as something accessible to all citizens – and as something that contributes to the economy and general well-being of a community. Many leaders see challenges in building new audiences, especially among the younger generations.

It is true that Arts Funds face many of the same challenges in workplace giving as does a local United Way. They each seek to reach donors in the workplace through effective messaging, and must compete for a share of a busy employee’s time and space.

It is for all of these reasons – and many more – that we now turn to a discussion of best practices. Despite and because of difficult economic times and a changing environment, many Arts Funds and local United Ways have worked hard to develop best practices in workplace campaigns. Indeed, many of these organizations are transforming themselves in radical ways to meet the challenges – and opportunities – of the emerging workplace.

Self-Reported Major Issues of United Arts Campaigns

City	Service area pop.	Per cap campaign rev.	% rev from WPG*	Top Three Issues (self-reported)
Charlotte	0.9 mil	\$12.64	68.1%	<ul style="list-style-type: none"> --Increasing public and private sector support for arts and culture both directly to ASC and to individual organizations --Keeping grants and service investments relevant, exciting, and fresh for constituents --Adapting our organization to changing community
Atlanta	5.5 mil	\$1.65	n/a	<ul style="list-style-type: none"> --We raise general operating support, but people increasingly want to give to specific initiatives --Finding new sources of funding --Operating in a city where we must constantly consider which companies are coming and going
Cincinnati	2.1 mil	\$5.72	50.8%	<ul style="list-style-type: none"> --Transitioning from being a service organization to being a leadership organization --Relevancy of the arts to the average donor as the arts are redefined --Fundraising during the current economic downturn
Louisville	1.2 mil	\$7.50	40.0%	<ul style="list-style-type: none"> --Long term stability of classical arts --Rebuilding audiences --Creating the next generation of patrons

d. Best Practices

A number of themes emerged from our interviews about best practice in workplace campaigns. They include:

- 1) communicating a strong message,
- 2) managing a well-maintained campaign process and
- 3) staying in touch with donors on a continuous basis.

We will discuss each in turn, below.

i. Communicating a Strong Message

Communication emerged over and over again as the absolutely most important factor in running a successful workplace campaign. Communication includes the message, the messenger and the means of communication. All three are critical to best practice.

1. The Message: We learned that forward-thinking campaign organizations seek to connect the message about who they are with community benefits. For example, the Fine Arts Fund and the Fund for the Arts both provide a message about how arts are a “very important piece” of their respective city’s quality of life. Through this message, they seek to establish “why you should care about the arts.” Examples of some of the messaging we heard:

- “This is the Time” to step up and give, being very positive in the campaign messaging;
- “Telling really good stories” about the benefits of arts for the community and individuals;
- Our hope is to “leave the community even better than when we started;”
- “Putting a face” on the stories of how the United Way and the arts benefit the community;
- “We send out postcards telling individual stories;”
- “Messaging is key even more so this year.”

In a similar way, local United Ways find that a strong message can help shape organizational strategy – and mobilize communities. For example, nine years ago the United Way of King County (Seattle) chose to focus on homelessness, based on results from a community needs assessment. Through strong messaging, they sought to “get on the radar screen” about generating community solutions for homelessness.

United Way of King County wrote a ten-year strategic plan whose aim, in part, was to draw attention to the cost of chronic homelessness to the community and provide

solutions. As a result, they now have successfully led an effort to adopt effective housing models that also save the community resources in the long term. “Our value add,” remarked a United Way of King County leader, “was to provide a bridge fund to have money to secure the property.” Creative messaging leads to creative solutions.

2. *The Messenger:* Best practice is clear: there is no substitute for a strong, engaging spokesperson during the workplace campaign. At the same time, it is just as important to obtain the visible support of corporate leadership.

A Bank of America Six Sigma study done on behalf of UWCC suggests that out of many factors examined, only a few have significant influence on the success of the workplace campaign. The most important variables identified in the study include strong workplace host leadership. Visible buy-in from CEO and executives produces a shared sense of mission and aspiration in the workplace campaign.

3. *Means of Communication:* We heard over and over again that successful workplace campaigns require “very engaged solicitation” where the person-to-person ask is all-important. Campaign managers seek “lots of control over touchpoints” – the various means of communicating with employees, including social media.

For example, Metro United Way in Louisville launched a “text to give” program through a partnership with the local Wendy’s franchise – long before others discovered this as an effective means to raise money for international disasters.

ii. Managing a Well-Maintained Campaign Process

There are many benefits to managing a well-maintained campaign process. First and foremost, successful workplace campaign leaders know that the process is just as important as the message – and directly impacts funds raised and the ongoing relationship with the corporate and individual donor.

Observers of Louisville’s Fund for the Arts remark that the Fund “raises way more than they should despite being ‘totally old school’.” We understand that Louisville’s campaign leaders stay in touch with their key corporate partners – and thank them for their donation. The process is such that it becomes “a badge of honor” to give to the Fund for the Arts.

There are examples of campaign best practice throughout the United Way system. We cannot underestimate the value of professional processes: helpful materials and communications templates for in-house campaign leaders, a user-friendly pledging process, sincere and timely thanks for donations – as well as providing measurements of impact. All of these contribute to a good donor experience, and one which a donor would look forward to year after year.

For example, at Vanguard in Charlotte, campaign planning for the next year’s United Way campaign begins almost immediately after the conclusion of that year’s campaign. “The infrastructure of the workplace campaign is very important,” according to

Vanguard's Charlotte executive who oversees the United Way campaign. Committee chairs for communication, education, special events, innovation and volunteers are chosen very carefully. "We treat it [United Way workplace campaign] like a six to nine-month project," states the executive, so that they may identify the "contenders from the pretenders." As such, he employs the same selection criteria for leadership as he would for any "mission-critical strategic project." Indeed, the role of the workplace campaign coordinator(s), which Vanguard has worked so hard to strengthen, was also one of the most important influencing factors that emerged from the Bank of America *Six Sigma* study.

Finally, we should not ignore the "fun" factor: the more fun employees have, the more they are engaged, and the more they donate. For example, Vanguard has been known to host "boxing" matches between rival departments using inflatable boxing gloves during the campaign. At Family Dollar, one of the most successful events for the ASC campaign incorporated a night out on the town for a "gallery crawl."

Challenges one United Way leader: "What is the business case to be made whereby we run the campaign? Not because it's all about us, but because we do a good job. There will be a better campaign result, which benefits the community."

iii. Staying in Touch with Donors Continuously

A "continuous relationship" with corporations *and* their employees is the third of the best practices that emerged from interviews. No longer are most employees satisfied with a "once a year" appearance by a workplace campaign organization in their workplace. If the only interaction is one in which the employee is asked for a donation, local United Ways and Arts Funds are missing a tremendous opportunity for developing long-term and deep relationships with donors.

Continuous engagement can take many forms. For example there is a local United Way pursuing a deliberate strategy to move early on the "extraordinary gift" effort in which they:

- Identified a short list of 50 best supporters who donate at the \$10,000 level and above and asking them for a one-time gift;
- Held a "campaign within a campaign;"
- Recognize donors for stepping up and making the extraordinary gift.

Volunteerism and employee engagement represents a tremendous opportunity in which to deepen a relationship and connect the individual to the community. Many corporations, including Bank of America and Wells Fargo, allow employees to devote a portion of their working hours to voluntary service. Increasing exposure to the arts through volunteerism is another important benefit with audiences not familiar with arts and culture offerings.

Finally, there is the matter of access to employees. Some worksites, understandably, express concern about privacy and prefer not to divulge donor's personal information. However, there are some corporations, such as the United Parcel Service (UPS) who allow employees to self-identify and share home emails with the local United Way. As a result the local United Way created the UPS Loyal Contributor Program, where the United Way stays in touch with the donor to provide information about the donor's area of community interest, and report back the impact of donations.

iv. Beyond the Workplace Campaign

Finally, we must acknowledge that in many parts of the country, local United Ways and Arts Funds have moved "beyond" the workplace campaign – and have done so out of necessity. For all the workplace and societal trends discussed previously, the workplace campaign is changing –and will continue to change. In some parts of the country, fundraisers have turned to the emerging field of social entrepreneurship as a means of revenue generation.

As an introduction to social entrepreneurship, we present the example of the partnership between the United Way of North Central Massachusetts and Youth Venture and this United Way's support of adult social entrepreneurs.

1. Youth Venture: United Way of North Central Massachusetts serves 19 communities northwest of Boston, located near Nashua, NH and Manchester, VT. Five years ago, they decided to try to engage a new generation of young donors. Working at the grassroots, they partnered with the social entrepreneur Ashoka to start a Youth Venture program at schools.

Youth Venture seeks to support small groups of student entrepreneurs on a nine-month "venture" as they develop business plans to address a particular community need – of their own choosing. Community and business leaders serve as mentors during the process, with a tangible end result.

The United Way connects potential donors with Youth Venture entrepreneurs through volunteerism and engagement. Volunteers evaluate proposals, serve on panels and shepherd the groups through an intensive nine-month process.

Youth Venture has been so successful in North Central Massachusetts that a global corporation headquartered there designated its entire campaign to Youth Venture. Youth Venture programs are now in several public school districts in the area.

This program is not confined to North Central Massachusetts. Youth Venture partners with the United Way in Boston, and has successful programs all over the country.

2. Social Fellows: United Way of North Central Massachusetts also launched a "Fellows" program to support adult social entrepreneurs. Applicants

present ideas to a panel for selection. These panels are staffed by donors and volunteers. If selected, Fellows receive a small amount of seed money (\$500-\$2,000), technical and consulting assistance, and networking to launch their proposal.

Examples of recent projects include:

- Knitting project started by a senior citizen to provide winter clothing to those in need; now over 100 community knitters provide \$250,000 in knitted blankets, scarves, hats and mittens to local nonprofits to distribute to the homeless during winter months;
- “Payforward” gift card recovery. A 24-year old young man is working with large retailers (e.g., Best Buy, Target) to donate unused portions of gift cards directly to nonprofits;
- A young woman with learning disabilities collects “attic treasures” from donors, sells them at a local flea market, and uses the proceeds to stock a food pantry at a local church.

Local United Way leaders estimate for every \$1 invested in a Fellow, approximately \$12 of “social capital” is generated for the community.

In conclusion, interviewees proved tremendously helpful in painting a picture of the workplace campaign environment in Charlotte, as well as in their respective cities. We learned that the workplace campaigns in Cincinnati and Louisville – cities considered to be comparable to Charlotte, as well as others – have much to offer us in learning about best practice. In particular, communicating a strong message, managing a well-maintained campaign process and staying in touch with donors on a continuous basis are key best practices. The message, messenger and means of communication are challenging and changing, yet form the foundation of shaping organizational strategy going forward. Some federated organizations have found means of connecting with donors and their community by moving “beyond” the workplace campaign.

Report of the Workplace Giving Task Force

VII. ASC & UWCC Responses

a. ASC Response

- i. Introduction**
- ii. Strategic Planning Acceleration**
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VII. ASC and UWCC Responses

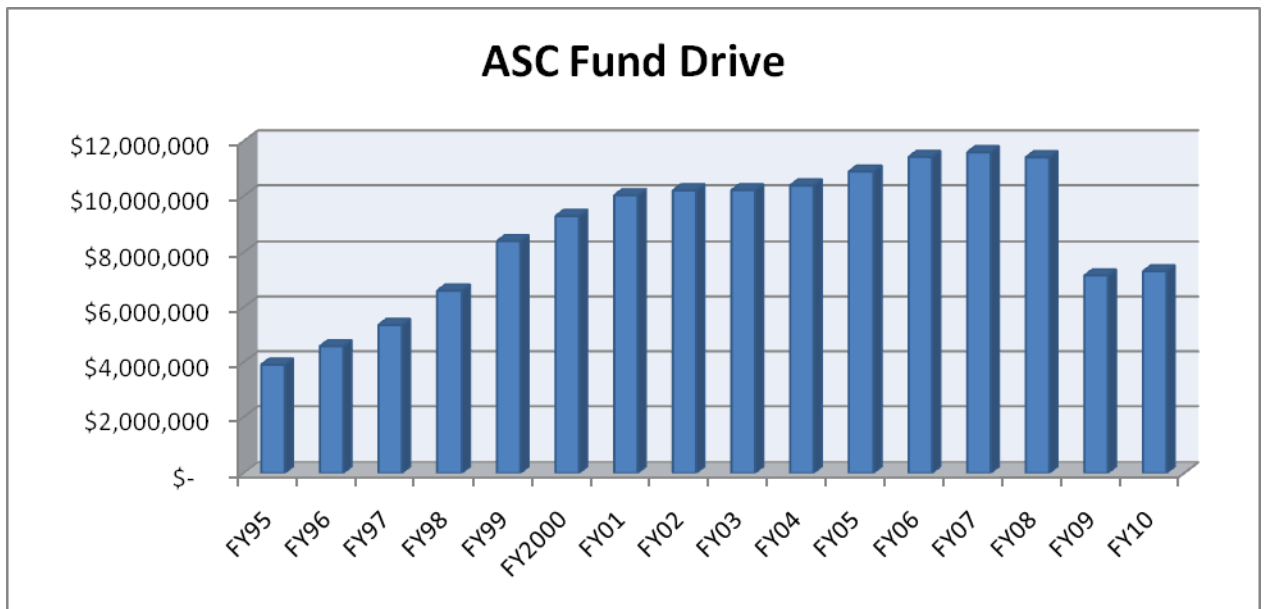
a. ASC Response

i. Introduction

“A Vibrant Cultural Life for All” is the organizational vision adopted by the Arts & Science Council’s Board of Directors in May 2008 when it ratified its five year strategic plan. The plan was adopted on the heels of the completion of the 2008 Annual Fund Drive that raised \$11.4 million in unrestricted support for arts, science and history (the second highest gross amount raised in a United Arts Campaign in the US).

As a component of the strategic plan efforts, over 25 interviews were conducted with corporate leaders throughout the community. The overwhelming message from corporate leaders at that time was that the workplace giving model being utilized by ASC was still the preferred means of supporting the cultural sector.

Fast forward to May 2010 and the landscape has changed. ASC’s 2009 fund drive realized a decrease in funding of 33%, the most significant decline in funding in the county (average decline experienced was 12%). The 2010 campaign was flat compared to 2009, not realizing any significant rebound in support.



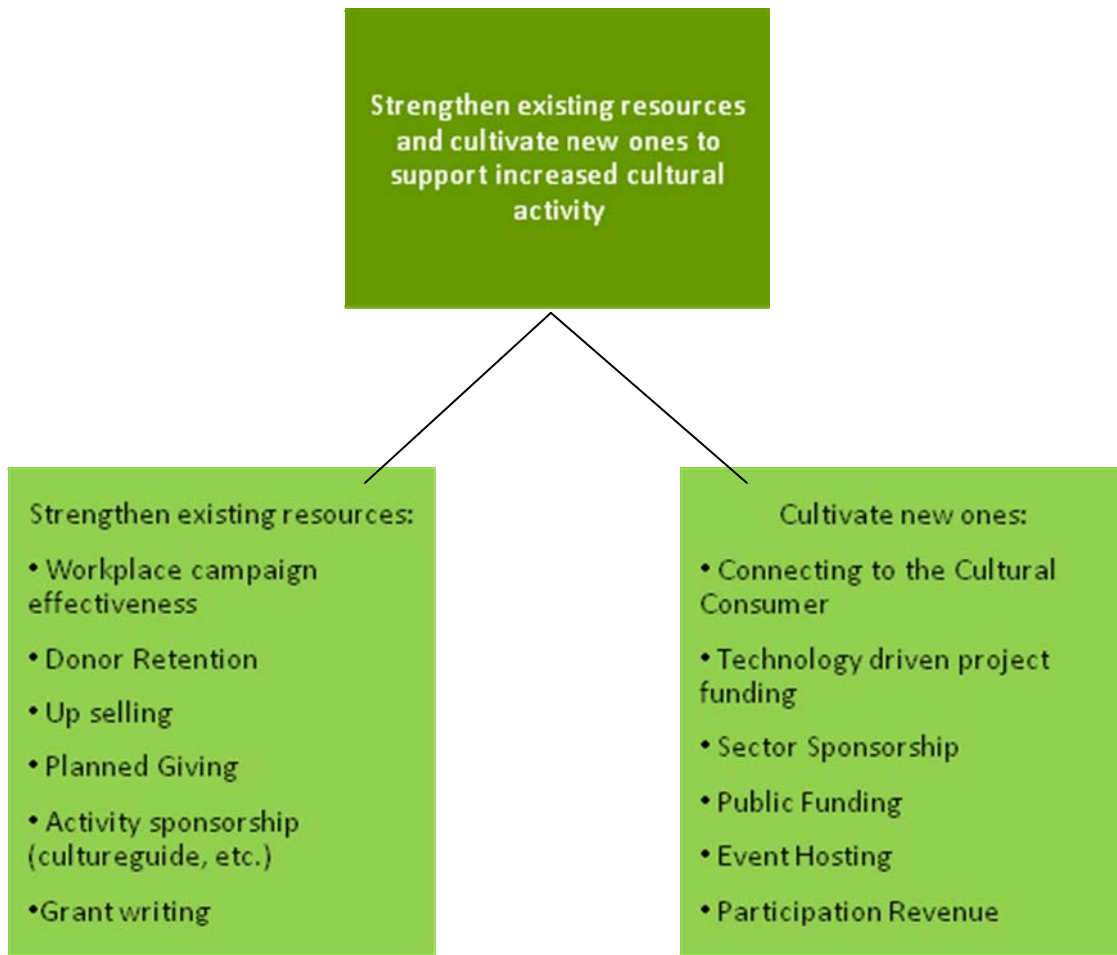
The impact in the funding was felt in volume of dollars and donors.

	2008 Annual Fund Drive	2009 Annual Fund Drive	2010 Annual Fund Drive
# of Individual donors	40,924	29,505	TBD
# of Corporate donors	602	332	TBD
# of Workplace Campaigns	497	432	406

A study on household giving from the Center on Philanthropy at Indiana University indicates that on average 9% of households donate to arts, culture and humanity nonprofit organizations. Mecklenburg County's 2008 population was approximately 890,000 with an estimated 680,000 households. A 9% penetration of households would indicate a potential target donor population of 61,200 for the cultural sector. This target would include not only donors to ASC but to all cultural organizations in the county. The gap between current donors and potential donors indicates a capacity to grow donor relationships with the cultural sector.

ii. Strategic Planning Acceleration

The strategic plan adopted in 2008 was designed around an assumption that there would be increasing resources to support the cultural sector. As a result of the changing environment, ASC suspended some components of the plan and accelerated others. Specifically, the aspects of the plan around enhancing existing revenue channels (workplace campaigns) and development of new channels has been the focus of staff and board leadership.



iii. Workplace Campaign Enhancements for 2011 and Beyond

As ASC reviewed the workplace campaign model throughout the 2010 annual fund drive, the theme to future enhancement is "Engagement." ASC is striving to engage all constituencies in a more effective way, including donors, employers and volunteers.

During the 2010 campaign, ASC piloted some of its initiatives with specific workplace campaigns. One significant campaign in particular adopted several new approaches to the campaign. Efforts invested are as follows:

Former campaign characteristic (BEFORE)	New Pilot Change effort invested (AFTER)
Volunteers serving as campaign coordinators in workplace provide 1 hour of training	Week long effort to educate volunteers on things happening in the cultural sector – inform and inspire
Employer driven messaging to potential donors	ASC provided specific messaging to go to employees to enhance case for support including increased clarity regarding the utilization of funds donated
Infrequent messaging during the campaign	Increased frequency and source of email messaging (from CEO, campaign chair, division leaders, etc.)
Generic request for a gift to the cultural sector	Specific request for support, greater than prior year support for returning donors and specific entry level gifts based on position within the company for new donors

The campaign that the above pilot efforts were implemented in saw an increase of 37% in giving to the 2010 campaign as compared to the 2009 campaign. To be repeatable, the workplace campaign employers must be willing to partner with ASC to modify solicitation requests, educate donors on the importance of giving and integrate company management into the campaign.

iv. 2011 Organizational Plans

ASC has a history of conducting community-wide cultural plans. In the past 50 years, ASC has conducted four Cultural Action Plans, a Facilities Master Plan, six Town Plans (Huntersville, Davidson, Cornelius, Mint Hill, Pineville, Mathews) and a Public Art Plan. In 2011, ASC will conduct its fifth community-wide plan (the most recent was completed in 1998). The plan will focus on the community’s desire for creativity and innovation and the intersection between the cultural sector and economic development and educational achievement.

b. UWCC Response

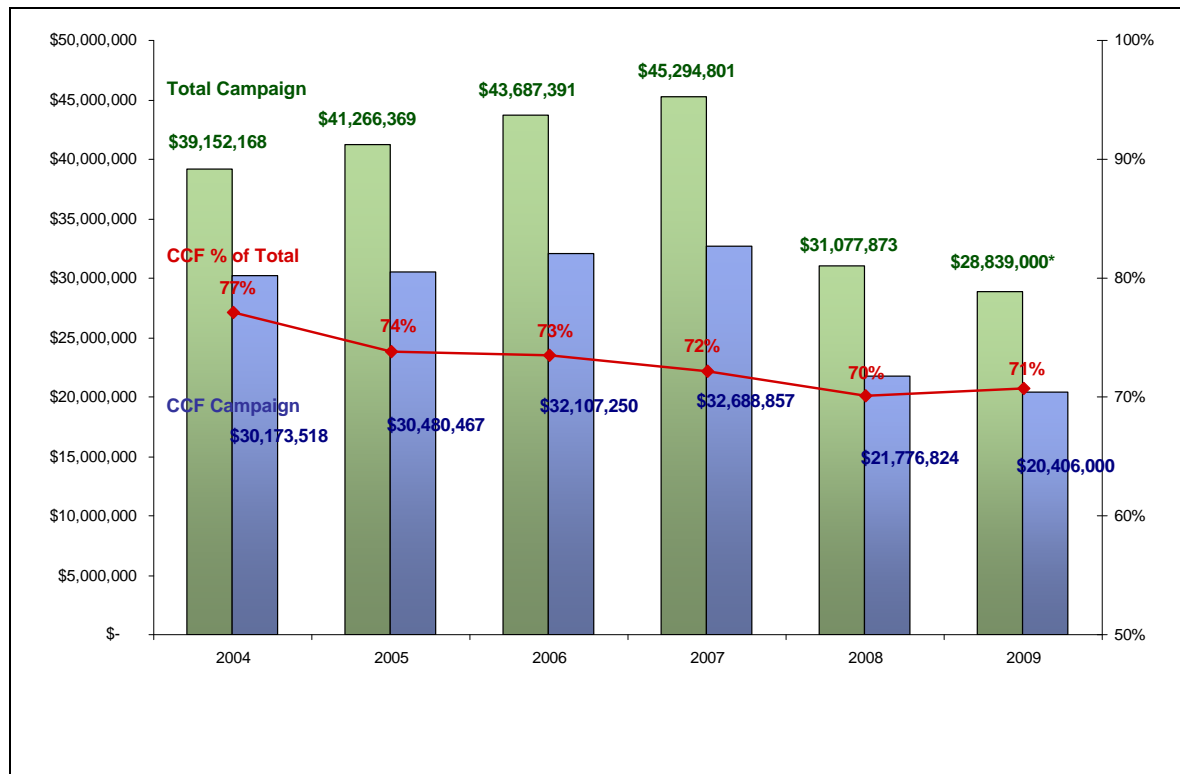
i. Success of 2009 United Way Campaign

The first priority during 2009 was the successful completion of the Annual Campaign. To keep United Way supported agencies from further cuts (allocations had been cut by an average of 40 percent in the prior year), United Way took the atypical step of focusing its 2009 goal strictly on the Community Care Fund, rather than a larger numerical goal that would include donations that would leave the community.

Despite the weak economy, an aggressive goal was set at \$22.7 million – \$1 million more than what was raised for the Community Care Fund (CCF) in 2008. This was done in conjunction with the Leon Levine Foundation, which offered to match any increase from 2008 dollar-for-dollar, up to \$1 million. New Executive Director Jane McIntyre was determined to earn the full grant, extending the campaign for an additional three months in order to do so.

The campaign officially closed and UWCC met the goal, earning the full Levine grant and enabling United Way to provide over \$2.8 million more than what was distributed in the prior year to the 96 United Way supported agencies in United Way’s five-county region.

UWCC Campaign Results: Prior Six Fiscal Years



ii. Leadership and Staff Changes

Since Jane McIntyre's appointment as Executive Director on Aug. 26, 2009, the United Way of Central Carolinas has undergone more positive changes beyond its well-documented fiscal cuts, which reduced the organization's operating budget by nearly 50 percent and enabled more dollars to get to United Way's agencies. In fact, there are currently 33 items on the official Change List.

During the past six months, Jane's leadership team has been strengthened with the filling of four critical positions: legal oversight, marketing, human resources and organizational development. Even with these additions, staff positions currently total 54, down from 97 in early 2009, which necessitated a significant workload redistribution to achieve the campaign goal. With the 2009 campaign completed, focus has returned to further restructuring. The full leadership team, in conjunction with several working teams composed of employees from throughout the organization, is helping to rebuild the internal culture, in addition to clarifying and updating staff roles and responsibilities.

iii. Board and Governance Changes

The newly reconstituted board of 22 members began governing on Jan. 1, 2010, with new roles and governance responsibilities. The UW Board Nominating Committee recommended 8 returning candidates and 16 new candidates, creating one of the more diverse, skilled, and committed boards in the community.

In a measure of how dedicated this Board is, in the first quarter alone, they met three times for orientation sessions that have extended beyond the scheduled three hours. Because of its smaller size (Bylaws now set the maximum at 24), the new Board has a much stronger voice in the deliberation of how United Way can bring added value to the community, in particular focusing on more closely aligning the supported agencies and donors.

iv. Changes in Overall Strategy

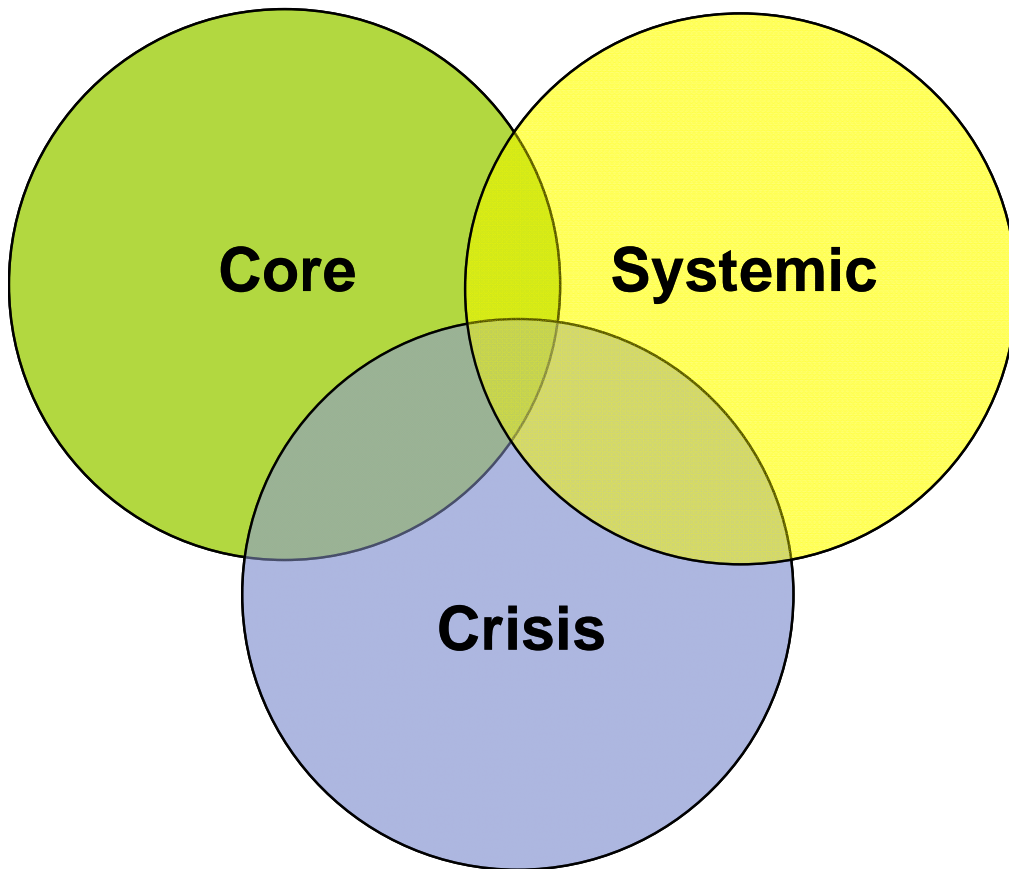
As result of its ongoing Reinvention Process, a year from now the United Way of Central Carolinas anticipates being a much more streamlined, seamless, and sustainable source of dollars for the region's health and human service agencies, delivering the strongest return on donor investment. We are making a shift to become more donor- and agency-focused, to ensure that people's generosity has a measurable impact by addressing the root causes of this community's problems. By helping donors understand how funding multiple social service agencies produces optimal social results, United Way will help empower a strong regional community.

1. Community Needs Assessment: A new community needs assessment will direct our focus, and will provide the data needed to demonstrate that solid

investments can produce significant, lasting change in services delivered by nonprofit agencies.

There are three essential social needs around which United Way will be focused:

- 1) long-term **core** operating funding for essential broad-based services
- 2) short-term innovation funding for projects with a **systemic** approach
- 3) one-time **crisis** response funds for emergencies, crisis, hardships



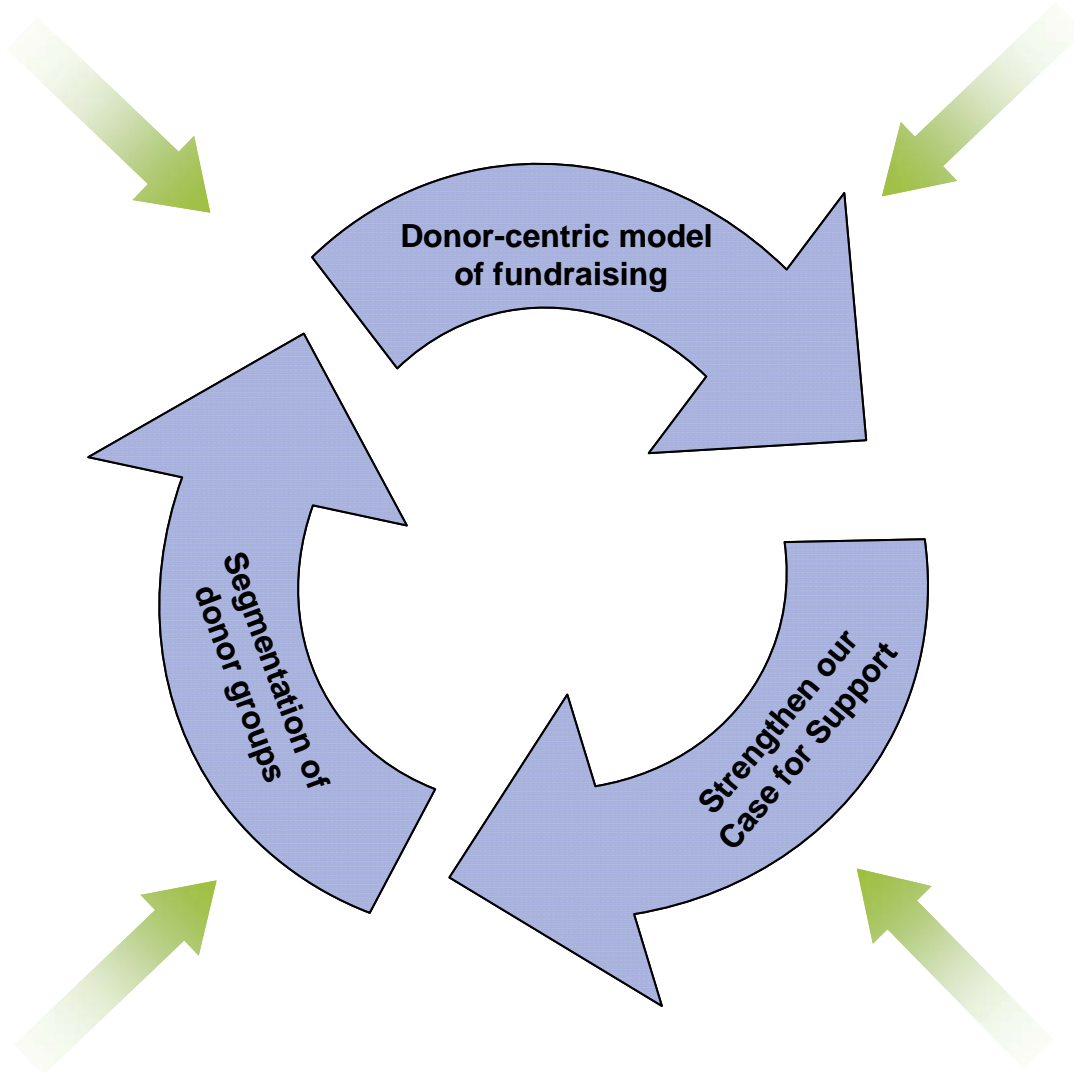
2. Sustainable Philanthropy: The 2010 Campaign will move from a single annual campaign to a fully integrated development program, where fundraising will take place 365 days a year.

Goals:

- To sustain next year's funding to community agencies.
- To build relationships with corporate donors and fundraise year-round.
- To build relationships with individual donors, beyond the workplace, and in non-traditional workplace settings, year-round.
- To respect the donor's need for information, accountability and giving interest.

Identify new roles & responsibilities for staff, volunteers and board members.

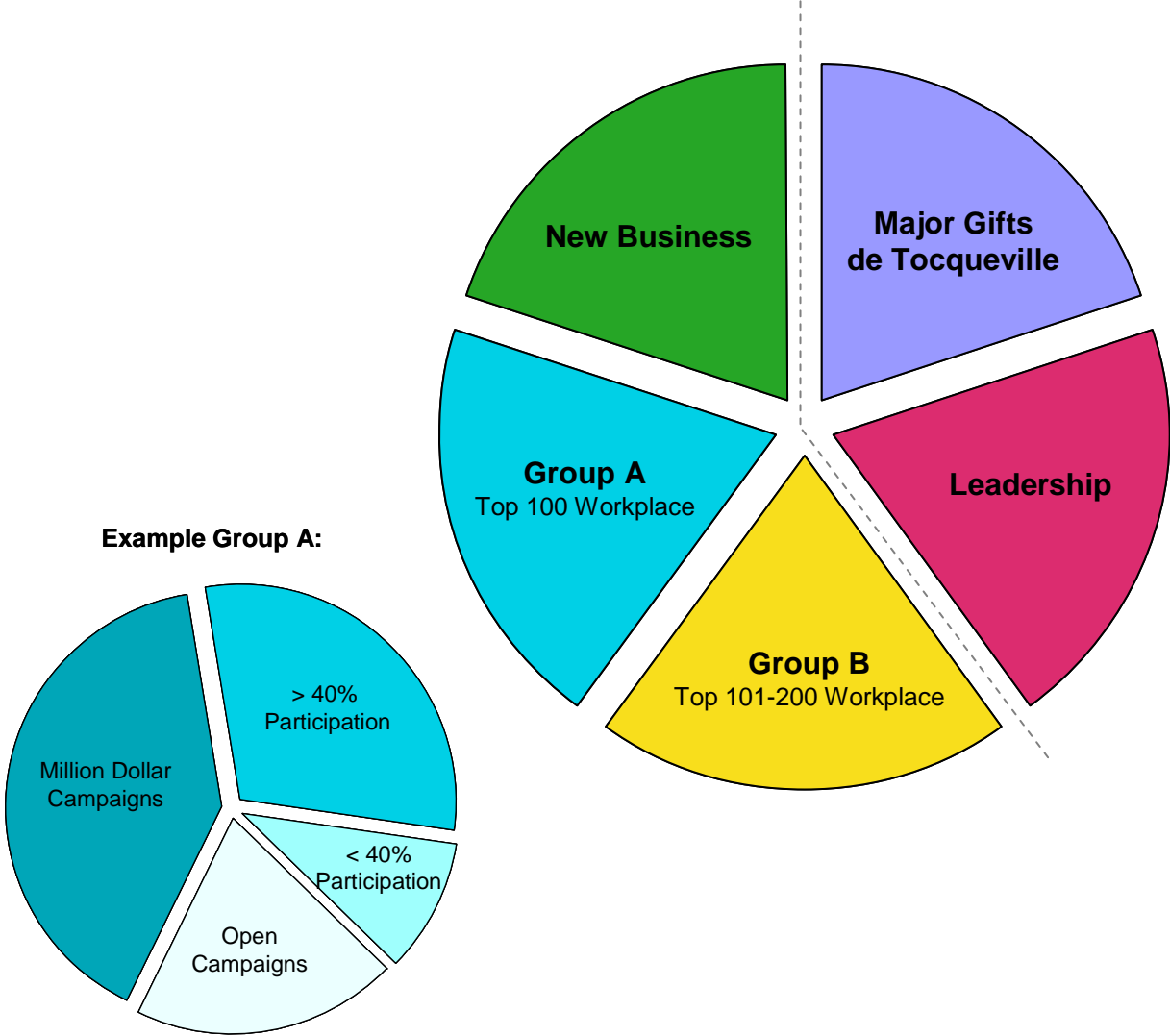
Retain a higher percentage of donors to stabilize declining participation.



Acquire new donors to help meet the increased needs for 2010, and to meet goal.

Increase average gift size of long-term donors, to offset economic impact.

Segmentation Strategy



VIII. Findings

a. Workplace Campaigns Are Critical

- i. Overview of Workplace Campaigns**
- ii. Types of Workplace Campaigns**
- iii. Different Impact for Multi-Party Campaigns**
 - 1. Diffused Message**
 - 2. Information Overload**
 - 3. Complexity of Operation**
 - 4. Declining Receipts**
 - a. Lower Overall Giving**
 - b. Less Money to Local Charities**

b. Responsibilities of Participants

- i. Workplace Campaign Organization Responsibilities**
 - 1. Clarity**
 - 2. Customization**
 - 3. Constituent Engagement**
 - 4. Coalition Building**
- ii. Workplace Campaign Host Responsibilities**
 - 1. Leadership**
 - 2. Execution**
 - 3. Fun**

VIII. Findings

a. Workplace Campaigns Are Critical

When run well, evidence suggests that workplace campaigns add value to a community's philanthropic landscape, with advantages for the local community, workplace campaign site and the employee. For instance:

Community Benefits - a strong nonprofit sector from healthy revenues and a helpful community-wide volunteer network to provide feedback and oversight provides a human services safety net, cultural and recreational amenities and economic development;

Corporate Benefits – corporations are only as strong as the communities in which they operate, so the community benefits are also corporate benefits, in addition, the corporation can build their image by providing strong support to the community and integrate their employees through community service;

Employee Benefits – employees get leadership opportunities within the corporation and the community, as well as develop social capital and may take advantage of the services and amenities supported.

When the degree of workplace campaign openness increases, employee choice increases; however, the complexity of the workplace campaign increases, with a resulting decrease to funds directed to local community needs. There is much empirical evidence to support this relationship. First, we turn to describing the many different ways in which a workplace campaign might be conducted.

i. Overview of Workplace Campaigns

A federated workplace campaign is one in which one campaign serves as the central point of collection for a larger number of charitable agencies. Typically, the receiving agencies undergo a rigorous vetting process to assure the federated workplace campaign organization – and, by extension, their donors – that their donations will support quality activities of the community, and are in keeping with the community's mission and values.

Over a number of years, the United Way established itself first as the only, and then as the dominant, federated workplace campaign in the country. Arts funds in many cities were also established, including Charlotte, Cincinnati and Louisville, among others. Traditionally, the United Way and many of these arts funds have concentrated fundraising activities in the workplace, in partnership with corporations, as well as in state and local government offices, public schools and in many other types of workplaces. Increasingly other federated workplace campaign organizations such as Earth Share, which operates a workplace campaign focused on the environment, have emerged.

In Charlotte-Mecklenburg, two federated workplace campaigns, United Way of Central Carolinas (UWCC) and Arts and Science Council (ASC), have been the dominant workplace campaigns. Traditionally run as separate campaigns, UWCC launches its workplace campaign in September, while the ASC campaign is in February.

ii. Types of Workplace Campaigns

Workplace campaigns are often described as “open” or “closed.” This description refers to whether one partner – or federation - or more than one partner is the focus of the workplace campaign. In reality, most workplace campaigns fall somewhere in the spectrum between the polar ends of open or closed.

Using the United Way as an example, we can readily detect the nuances along the closed/open campaign spectrum. Of course, the descriptions below are but five examples of the ever-evolving diversity in the workplace campaign:

1. United Way led and benefitted only (“closed campaign”) - UW is the only charity in the campaign. Emphasis on giving to the Community Care Fund and designated agencies.
2. United Way led with designation to any 501(c)(3) agency allowed - UW is the prominently positioned and lead charity in the campaign. Designations to any 501(c)(3) organization allowed, but not emphasized.
3. Company branded, United Way led - Campaign is branded by the company as its community fundraising effort. UW is the philanthropic partner of choice yet a variety of designation options may be allowed and/or promoted.
4. Side-by-side (United Way and ASC or other federations conduct simultaneous campaigns) - UW and other federations share the role of philanthropic lead. A variety of designation options may be allowed.
5. Company branded— no philanthropic lead - Campaign is branded by the Company. No organization serves as a philanthropic lead. A variety of designation options may be allowed.

Workplace campaigns, and especially those in Charlotte, have traditionally been “closed,” meaning that any given campaign was conducted exclusively by and for either UWCC or ASC. Over time, workplace campaigns have become more varied in their approach, with the trend being more pronounced on the West Coast but occurring throughout the US. However, as described earlier in this report, the majority of Charlotte Mecklenburg’s workplace campaigns remain closer to the “closed” model.

Using United Way as an example, the benefits and potential challenges for the workplace campaign are as follows:

Types of Workplace Campaign, Using United Way Example

Campaign Type	Description	Potential Benefits and Challenges		
		Local community	Site	Employee
1. United Way only (“closed campaign”)	UW is the only charity. Emphasis on giving to the Community Care Fund and designated agencies.	All donations directed to UW, increasing funds for local community. Agencies vetted by United Way	Single message simplifies complexity of campaign, its length and number of relationships to manage.	Assurance of agency soundness & quality. Potentially limits choice.
2. United Way with designation to any 501(c)(3) agency	UW is the lead charity. Designations to any charity allowed.	Prominent placement of United Way gives community needs a strong voice. Designations likely to move funds out of community.	Increases complexity because of multiple beneficiaries and number of messages to be managed.	Increases choices.
3. Company branded, United Way led.	Campaign is branded by the Company. UW is the lead and philanthropic partner of choice. A variety of designation options allowed.	If local needs are clear focus of the campaign, then community can benefit. If not, then message becomes diffuse, receipts are weaker and funds move out of community.	Gives company greater control over workplace messaging. Greater opportunity to align/reflect company philanthropic goals with/through campaign.	May increase loyalty to corporation and greater awareness/appreciation of corporate philanthropy.
4. Side-by-side (United Way and other federations)	UW and other federations share the role of philanthropic lead.	Community benefits to the extent that other federations benefit community. If not, then message becomes diffuse, receipts are weaker and funds move out of community.	Creates competition among campaign messages and diffuses message and purpose of campaign.	Increases employee choices, but can confuse because of multiple messages.
5. Company branded—no philanthropic lead	Campaign is branded by the Company. No organization serves as the philanthropic lead.	High levels of designations have the potential to divert funds from community.	Creates high level of competition among campaign messages. Onus of work to run campaign shifted to company, which is less likely to have fundraising expertise.	Highest level of choice. Potential for the greatest degree of confusion, lack of clear messaging.

iii. Different Impact for Multi-Party Campaigns

As described above, several changes occur as campaigns move along the spectrum from traditional, closed campaigns to more open ones. As other nonprofits and/or federated charities (such as Earth Share) are combined with a traditional workplace campaign, such as the United Way, according to our analysis, we observe the following:

1. Diffused message: When there are multiple partners and/or beneficiaries, an inevitable diffusion of the “message” occurs. Donors may choose among many options. In this case, typically a workplace is careful not to “tip the balance” in favor of one recipient or another in order to promote a level playing field. However, this tends to handicap all the potential recipients and reduce the connection needed to encourage giving.

2. Information overload: It is also observed that as the number of partners increase, and employee choice proliferates, there can be simply too much too information for a potential donor to make informed choices. Researchers in the science of decision making have found that most people can choose among only five to nine options. It is also true that there are many channels in which a donor may procure information (e.g., email, internet, social media, etc.), so much so that he or she might simply give up and not donate at all. Said one United Way development officer, “Just because you have ‘choice,’ you don’t get more donors...it’s too overwhelming.”

3. Complexity of Operation: Again, as the number of partners increase, the workplace campaign process itself increases in complexity, resulting in a larger and more unwieldy process for the corporate staff to manage. There are those workplaces that prefer not to field requests from an infinite number of charities seeking support. Indeed, we observe also that the hidden costs in communicating, managing and coordinating a multi-partner workplace campaign can be significant costs for a corporation – and they are ones that are not typically measured when making a decision about the degree of openness in a workplace campaign. Finally, the back end process of managing the receipts and disbursements also becomes more difficult and time-consuming.

4. Declining Receipts:

a. Lower Overall Giving: As noted above, the result of a more open campaign is likely to be a flat or declining revenue stream from workplace campaign efforts. That is, both the workplace campaign host and the community have a declining return on their investment of time and effort.

b. Less Money to Local Charities: Finally, one of the most significant results of the move toward openness is where the donations go. Overwhelmingly, the evidence suggests that as campaigns open up, the total amount received does not necessarily decrease; however, there is very strong evidence which demonstrates that the amount designated for the local community does decrease – and, in some cases, it

does so quite dramatically. For instance, in Orlando, Florida, an open campaign resulted in a 90% drop in giving to local arts organizations.

Given the significance of the above assertion, we will examine the evidence, below.

Eight of the 120 United Way National Corporate Leadership companies (the largest United Way partners in the country), have brought in other federations or added several agencies in side-by-side workplace campaigns with United Way. Results demonstrate that, over time, dollars and donor participation decrease, due largely to the diffusion of the message and lack of focused attention on community-based needs.

- A company that opened their workplace campaign to multiple partners in 1997 experienced a 143% decrease in its campaign donations over the next seven years. In 2004, they removed the multiple partners. As a result, over the next 3 years the campaign increased by 42%.
- Another company operated its United Way workplace campaign with limited donor choice and 60% participation. In 2001, they moved to an open workplace campaign and participation dropped to 24%. In 2004, they made a decision to “narrow the campaign” by including 3 federations along with open choice. Employee participation dropped to 12%. This company is now revisiting the entire structure of their campaign.
- The University of Louisville opened up its United Way campaign to all 501(c)(3) designations in 2009. As a result, its workplace campaign dropped by 30%, and donations to the United Way dropped by 50%.

According to United Way research using data from the 120 largest corporate partners during the 2006 workplace campaign:

Workplace Campaign Measure	United Way as Philanthropic Lead	Philanthropic Lead Role Shared
Percent participation rates	38.5%	15.5%
Employee per capita donation	\$104	\$29
Average employee gift	\$276	\$164
Average campaign growth 2005-2006	3.7%	-6.8%
Percentage of direct donations to United Way (Resources Under Management)	78.6%	54.4%

Interestingly, of all the types of workplace campaigns, those that are Company branded and United Way led produce the largest per capita employee, corporate and average employee gift of all. However, once again, the percentage of direct donations to United Way (also called Resources under Management or RUM rate) decrease.

According to 2006 workplace campaign results for United Way’s largest 120 corporate partners:

Type of workplace campaign	Employee participation percent	Employee gift per capita	Corporate gift per capita	Average employee gift	Resources Under Management	2005-2006 percent change in total gift
United Way only (“closed campaign”)	39.0%	\$91.40	\$45.98	\$240.84	89.8%	4.4%
United Way with designation to any 501(c)(3) agency	38.6%	\$100.12	\$51.60	\$270.27	78.3%	2.6%
Company branded, United Way lead	36%	\$178.14	\$148.72	\$516.70	53.0%	6.5%
Side-by-side (United Way and other federations)	14.3%	\$27.41	\$11.49	\$158.17	58.7%	-2.3%
Company branded—no philanthropic lead	31.2%	\$46.92	\$30.34	\$154.89	34.3%	-24.2%

Competition for opportunities to be a part of workplace campaigns is an issue that United Way and ASC must face. Some companies and investors will continue to opt for the broadest array of choices possible. Yet, the research shows that the more focused the workplace campaign, the stronger the campaign results. Partnering with United Way or ASC offers the unique ability to focus on and help solve the critical issues facing the **local** community—something in which corporate and individual donors are interested.

As noted above, Resources under Management is a critical measurement. As a workplace campaign opens to partners beyond United Way only – and, by extension, for ASC – it may yield higher per capita donations. However, the percentage of the donations designated to the United Way out of total donations steadily decreases, resulting in fewer total dollars remaining in the community and directed towards community needs.

The above research suggests that the highest benefit to the local community occurs when there are strong, focused United Way or other community-based campaigns in

the workplace. When potential investor companies and individuals see the difference they can make in strengthening the fabric of their local community through United Way and ASC, we assert that there is less need to exercise designation options or “control” one’s gift. In particular, those United Ways that are farther along in implementing the community impact agenda (see VI above), and who have effectively communicated the message to donors, have stronger than average resource development results.

The relationship between United Way and ASC and its corporate partners is a mutually beneficial one.

- Workplace campaigns in which United Way or ASC is the main philanthropic partner have stronger overall performance, which benefits United Way, ASC and the workplace.
- Partnering with United Way or ASC increases the likelihood that dollars donated remain in the community, with the result that the organization will be considered socially responsible, a good corporate citizen by the public and its employees, not to mention the benefit to the community itself.
- Focused campaigns provide an opportunity for ASC and United Way to join forces with others in the corporate and social sectors to increase support for community-based solutions to the community’s most pressing needs.
- In addition, according to a 2003 United Way of America Public Opinion poll, positive benefits flow to the workplace campaign host:
 - a majority of people (59%) indicated that their company’s support of the United Way “makes them feel good about the company” ;
 - 71% also said that they were “inclined to work for a company that supports community impact through donations”;
 - 78% of respondents said that they would be “inclined to shop in a store that supports community impact through donations”;
 - 74% said that they would be “inclined to invest in a company that supports community impact through donations.”

b. Responsibilities of Participants

As stated above, we believe workplace campaigns are most successful – and provide the highest benefit to a community - when there is a strong partnership between the workplace campaign organization and the workplace campaign host. Each plays an important role, and Charlotte is no exception. Both ASC and United Way of Central Carolinas have a role to play, as do the workplace hosts. Informed by our many conversations and interviews, we learned much about this important aspect of the equation, and will treat each in turn. We begin with recommendations for ASC and UWCC.

i. Workplace Campaign Organization Responsibilities

We summarize the responsibilities of the workplace campaigns by use of the “Four C’s” –Clarity, Customization, Constituent Engagement and Coalition Building: demonstrating the case for giving, customization of campaigns to fit workplace needs, engaging constituents in order to build continuous relationships and shoring up support by building coalitions. It should be noted that the strategies undergirding Clarity, Customization, Constituent Engagement and Coalition Building are beneficial in all cases. That is to say that no matter the type of workplace campaign – open or closed – these particular strategies are key.

1. Clarity: Communicate a clear message about value and impact in order to build the case for giving. It is abundantly clear that, no matter the type of campaign, a clear and distinct message is the most important component. As all advertisers know, a clear message, consistently repeated, is the essence of any marketing effort. The same holds true for fundraising and workplace campaigns.

ASC and UWCC must communicate to donors why giving to ASC or UWCC is valuable, and how their donation will make a difference to the local community. What are they all about? For example, in Seattle, the United Way of King County is known for its work to end homelessness in that community. What does ASC or UWCC represent for and in the community? Individuals are more likely to give, and give generously, when they know the “value proposition” of the campaign.

Tangible and measurable impact forms an important part of the value proposition and case for ASC and UWCC. To the extent that ASC and UWCC provide quantitative and qualitative outcomes to the community, the case will be strengthened.

At the same time, donors increasingly expect UWCC and ASC to serve as “experts” in their respective fields – as well as leading voices at the table in areas of their expertise. Therefore, it is imperative that ASC and UWCC develop and communicate a deep understanding of the issues under their purview. Following the example of the United Way of Greater Los Angeles and others, we urge ASC and UWCC to collaborate with partners, such as UNC Charlotte’s Urban Institute, who can provide credible research reports on pressing issues in the Charlotte community.

Over time, there will be a tremendous opportunity for ASC and UWCC to become a convener around issues in the local community, as well as direct their funding in ways that impact those issues. When the workplace campaign partner builds a strong case for funding *issues* as opposed to agencies, focus dramatically changes. Indeed, according to the many interviews we conducted with benchmark agencies around the country, and the example of the United Way of Greater Los Angeles in “Building Pathways out of Poverty,” there has been a dramatic shift. For example, consider Cincinnati’s Fine Arts fund: the message to the community is about “how the arts create vibrant neighborhoods” in a time of increasingly urban disintegration, not “give to the arts.”

2. Customization: Collaborate with workplace partners to adapt campaigns to partners' needs. The research is clear: workplace partners increasingly shape their workplace campaigns and other philanthropic endeavors around an overall strategy. According to a Center on Philanthropy at Indiana University report, global corporate philanthropy seeks more and more to do two things: (1) to strengthen ties with “close” constituents such as employees, customer and the local community, and (2) to strengthen ties with more “distant” connections such as regulators, policy makers and the general public. Given that several of the nation’s largest companies are represented in Charlotte, the opportunity for UWCC and ASC to work with these partners to help shape a unique workplace campaign in keeping with corporate philanthropic goals is attractive, indeed.

Customization also includes expanding the geographic and sector footprint. There was a day when campaign goals could be met by cultivating relationships with the few large corporations headquartered in the heart of Charlotte’s Uptown (Downtown) business district. In fact, Bank of America, Duke Energy and Wachovia’s headquarters are all within walking distance. Mergers and the economic downturn have changed this picture, as has the growth of new and medium-sized corporations located outside the traditional downtown area. ASC and UWCC are urged to consider how and in what way they may expand the geographic footprint by reaching out to these corporations, as well as large employers outside the for-profit business sector, such as UNC Charlotte. We are reminded that Family Dollar in Matthews leads one of the most energetic ASC workplace campaigns; Vanguard does the same for UWCC from the Coliseum area.

3. Constituent Engagement: Building continuous relationships. The third of our “C’s” comprises strategies and tactics to connect with individual donors, volunteers and the community in a meaningful way. For those workplace donors who are interested and for the community at large, creative marketing and communications are a requirement. Getting the message out through email, social media and other types of media (e.g., radio, ads on city buses, billboards, etc.) helps build awareness among donors and potential donors that ASC and UWCC are active and deeply engaged in the community. Most of those whom we interviewed indicated that they would welcome contact from ASC or UWCC outside the workplace campaign

The first step in building continuous relationships is to segment constituent groups – and to learn more about their interests and preferences. For example, let us consider donors. Not all donors are the same: some prefer frequent communication; others prefer to give once during a workplace campaign and not be contacted at all outside the campaign. There are donors who are passionate about ballet; there are others who are not. There are those who give a little, but give faithfully; there are those who make a once in a lifetime gift. Thoughtfully segmenting donors according to meaningful criteria allows ASC or UWCC to reach donors in an intelligent way that yields impact and an eventual deepening of relationship. Following donors as they move in the workplace, as well as those who retire from the workplace, will be increasingly important.

Board members are a tremendous asset to the nonprofit. With new leadership at ASC and UWCC, and a newly reconstituted Board at the latter, the time is ripe to develop an enhanced relationship with the ASC and UWCC Board. Board members not only are ambassadors for the organization, but also can be the ones most passionate about the organization's mission. They can build bridges across the community in effective and creative ways.

Finally, but not least, we urge ASC and UWCC to continue to explore new channels for revenue generation, including social entrepreneurship. In years past, workplace giving in Charlotte was a matter of nurturing strong relationships with a few corporate partners. As we have seen, the workplace has changed, as have factors that influence employee preferences and choice. The traditional once-a-year workplace campaign is an important channel for donations, but it is not the only one. For example, social innovators like Ashoka are partnering with United Ways all over the country to establish Youth Venture, a structured program that promotes social entrepreneurship among young people. Today's donors seek direct contact, impact and more intensive involvement than has been seen in years past – and today's younger donor considers this to be essential.

4. Coalition Building: Brokering support. Our fourth “C” is by no means the least. We heard over and over again in our interviews and research that no leading arts or human services organization would chose to “go it alone” in tackling their respective communities’ most pressing needs. Many build coalitions on both the donor and service delivery sides to shore up support and pool resources. For example, it is not uncommon for arts organizations to appeal to donors of many member organizations to contribute to a large capital campaign, for the good of all.

Indeed, in Charlotte, the recent Campaign for Cultural Facilities grew out of an extensive planning process supported by the John S. and James L. Knight Foundation, the National Endowment for the Arts, the Arts & Science Council of Charlotte-Mecklenburg, The Foundation For The Carolinas and Charlotte Center City Partners along with a Blue Ribbon Committee of 130 community stakeholders. With a campaign goal of \$83 million, this joint effort supports the construction of facilities to house seven cultural organizations. Clearly, one of the key components of this successful multi-year effort has been collaboration: the sum has been greater than the parts when seeking to raise large sums of money for major downtown construction.

Many health and human services providers have discovered the power of coalition building in shoring up support for social change or for addressing large, complex issues. For example, Elise Buik, CEO of the United Way of Greater Los Angeles, spends a great deal of time and energy reaching out to the various “power brokers” in that fragmented and geographically dispersed city. Early on, she found it very helpful to spend time with the local police chief to better understand the challenges that poverty creates in the city's law enforcement effort, as well as to build coalitions with local leaders in the Hispanic and African-American communities, among many others.

As part of its Success by Six early childhood program, Metro United Way of Louisville partnered with Americana Community Center, Louisville Central Community Centers, Neighborhood House, Presbyterian Community Center and New Directions Housing Corporation. This partnership, called the Gheens Bridges to Tomorrow Initiative, operates innovative childcare centers that engage the child’s family members and other care providers in a holistic manner. In interviews, we were told this breakthrough approach to childcare would have never been possible if any one of partners had not been a part of the coalition working on the project.

ii. Workplace Campaign Host Responsibilities

No matter the type of campaign, our research suggests a strategy of Leadership, Execution and Fun (LEF). Just like the “Four C’s” for our federated campaign partners, a LEF strategy is one that undergirds workplace campaign success in any campaign environment, no matter where it falls on the closed/open spectrum (see Appendices B and C).

In fact, a list of Workplace Host Best Practices compiled from among United Way’s 98 largest national corporate partners yields a list that reflects LEF:

1. Appoint a national campaign chairperson
2. Set goals and track results nationally
3. Establish a steering committee
4. Recruit site coordinators
5. Conduct separate briefings for senior executives
6. Conduct a company-wide leadership giving program
7. Strategically recruit campaign solicitors
8. Promote corporate match of employee gifts
9. Utilize corporate and local United Way staff resources
10. Engage in volunteer activities across the country.

We address each element of LEF in turn, below.

1. Leadership: Articulating a “community first” message. According to a *Six Sigma* study conducted jointly by Bank of America and UWCC in 2006-2007, local workplace campaigns in which CEO’s made personal appearances during the campaign and personal “asks” had the largest participation rates and average gifts. As the old saying goes, “People give to people” – and corporate leadership in this area is key.

Workplace leaders who clearly articulate the message that a workplace donation to ASC or UWCC is a donation to the well-being of the local community provide a credible witness to the importance of giving to the Charlotte Mecklenburg community. Workplace leaders are invited to share how money given to ASC and UWCC will be leveraged for the community in the highest possible manner – and allocated through rigorous and volunteer-led grants processes.

2. Execution: Working in active partnership with ASC and UWCC.

Those workplace partners who are active partners with ASC and UWCC generate positive outcomes for the campaigns. For example, while each campaign may have its own flavor, the way in which ASC and UWCC staff are allowed input to pledge card design and e-campaign processes, access to making presentations to groups of employees and the degree to which they are allowed to follow up with individual donors with the donors' permission – all of these things have a huge impact on the success of a workplace campaign. They cannot happen without a true partnership between the workplace campaign host and the workplace campaign organization. ASC, UWCC and other workplace campaign organizations concentrate their time and effort on conducting those campaigns well and have national peers with whom they exchange ideas, best practices and new developments. It is unwise to ignore or dismiss their expertise. Instead, they should be used, as noted in “Customization” above, to provide good practices that can be adjusted to each campaign

3. Fun: Creating a campaign “event”. In interviews, we heard over and over again how much fun certain workplace campaigns are. For example, Family Dollar sponsors a myriad of employee-driven arts-related events during its ASC workplace campaign. In years past, the company has sponsored children's art exhibits, a marionette production on-site and company-wide contests. At Vanguard, past United Way campaigns have seen department-wide competitions, and even a “boxing” match between departmental rivals.

IX. Recommendations

a. Optimal Model

i. Single Purpose, Separate ASC & UWCC Campaigns

ii. Third Campaign for Choice

b. Best Practices, Even If Optimal Model Not Possible

c. Continuous Change and Improvement

i. Investing in Solutions, Not Just Allocating Dollars

1. Community Needs Assessment

2. Strategic Planning

3. Coalition Building

4. Choosing Funding Partners

5. Reporting Impact

ii. Clarity of Purpose and Value

iii. Broaden and Deepen the Donor Base

1. Cultivating Individuals After the Campaign

2. Expanding Geographic Reach

3. Seeking Large Gifts for Special Projects

4. Using Best Practices

5. Adopting New Models

iv. Transparency

IX. Recommendations

a. Optimal Model

In order to provide the best opportunity for local workplace campaigns to benefit the local community, which was a goal expressed repeatedly in interviews and research, we offer the following optimal model to align the unaligned workplace interests and provide maximum community support. The Task Force recognizes that not all companies will be able to or wish to follow this model, so additional recommendations are made regarding the best practices that will help a workplace conducting a campaign that does not fit the optimal model.

i. Single Purpose ASC & UWCC Campaigns

The value of workplace campaigns comes from their capacity to work in the community to evaluate the most impactful use of charitable dollars in their area of expertise. In order to assist in that cause, closed campaigns (meaning for those organizations only) is the method to maximize community results.

As discussed previously in this section, research clearly indicates that single-focus “closed” campaigns result in the largest amount of dollars generated for the local community. They also result in the highest employee participation rates. A foundational assumption of the Workplace Giving Task Force is that our aim is to generate the maximum support possible for local community needs.

It is clear that there are many choices before the busy corporate leader, and in particular, many internal and external issues to consider when making the workplace giving decision. We acknowledge that the workplace campaign partner is a guest of the workplace. However, we also believe that the evidence is clear: a single-focused workplace campaign where UWCC or ASC is the philanthropic leader provides the highest benefit for the Charlotte-Mecklenburg community.

ii. Third Campaign for Choice

For those workplaces which desire to provide a broader array of nonprofit beneficiary options, there is not better alternative for the community than hosting three campaigns, presuming that two are ASC and UWCC only campaigns and the third provides additional choices for employees.

b. Best Practices, Even if Optimal Model Not Possible

Even if the workplace campaign host cannot, because of national policies or other factors, run a single-purpose campaign, ASC and UWCC should be the main philanthropic partners of

workplace campaigns. There is no value to the local community in running a workplace campaign on behalf of non-local charities.

The Task Force recognizes that not all workplace campaign hosts will be able to choose the optimal model of two separate, ASC and UWCC campaigns, plus a third campaign for other choices. Therefore, the Task Force urges workplace partners to consider the following strategies based on where they fall in the following matrix. No matter the situation, we urge workplace partners to follow a strategy that will maximize the funds available to benefit the local arts, science, culture and health and human services needs of the local community – which we present, below.

Workplace Campaign Strategy by Segment

High	<p>III. Strong workplace giving decision-making by individual donors where leaders' example matters greatly</p> <p>Strategy: Provide clear messaging to individuals, but also provide visible and meaningful leadership</p>	<p>IV. Strong workplace giving decision-making by corporate leaders; individuals likely to give to meet expectations</p> <p>Strategy: Provide campaign tools to corporate leadership and they customize and execute</p>
	<p>I. Strong workplace giving decision-making by individual donors</p> <p>Strategy: Provide clear messaging about benefits and local impact to individuals via multiple channels</p>	<p>II. Strong workplace giving decision-making by corporate leaders to relatively flat organization</p> <p>Strategy: Strong messaging and campaign leadership from corporate leaders, lots of "hands-on" activities</p>
Low	Low	High
Degree of corporate "influence" over workplace campaigns		

These strategies hinge largely on the visible leadership and strong modeling that workplace campaign leaders can provide their employees. We will consider each in turn according to the strength of the matrix box above:

- **Box IV: High/High** tends to be the most fruitful environment for a successful community-based workplace campaign. In this environment, a strong message from executive leadership about local giving typically commands attention. Many will follow top management's example. Therefore, workplace partners in the "High/High" box do well with a strategy that provides a "road map" for executing a workplace campaign from the top down – but also one that can be customized to the local market.
- **Box II: Low/High** is also fertile ground for the successful community-based workplace campaign. For these workplace partners, leadership example is key to "corralling" a group of sometime independent-minded colleagues to give. The organization tends to be flatter, thereby making means of communication all more

important. In this environment, hands-on activities that demonstrate the importance of the community-based recipient are especially powerful. For example, financial services company Vanguard arranges “field trips” to United Way agencies and sponsors a number of fun competitors during its very successful UWCC workplace campaign.

- Box III: High/Low has the advantage of a more defined corporate communications structure, allowing messaging to flow through standard channels. However, workplace partners in this box have offered employees a greater array of choice in the workplace campaign, often combining a number of federated campaigns into one open campaign. For those partners, we strongly urge that United Way and ASC be invited to participate as the “philanthropic lead” in the campaign. Messaging and modeling by corporate leaders commands attention. Therefore, the degree to which corporate leaders visibly support the community campaign can provide a significant impact.
- Box I: Low/Low is the most difficult environment in which to influence the individual workplace donor decision. The donor works in a relatively flat organization; he or she might work autonomously with less frequent communication from corporate headquarters. The donor has a large number of potential recipients to choose from as he or she makes philanthropic decisions. In this environment, the best strategy is for the workplace campaign leader to develop a carefully crafted communications strategy that attempts to connect with the donor through multiple channels. Too many choices may diffuse the message that is before the busy professional. Therefore, providing a clear message about community impact is crucial to the success of the workplace campaign.

The above recommendations to ASC and UWCC cannot be successful without the cooperation and support of Charlotte Mecklenburg’s corporate, government and social sector workplaces that generously provide the opportunity for ASC and UWCC to conduct workplace campaigns. We recognize that we are speaking to two workplace audiences: those who have already made a choice about campaign structure and who may not be able to change; and to those who may have a choice of campaign structure. Regardless of audience, our intent is to suggest ways in which to strengthen the workplace campaign so that it may contribute maximum benefit to the local community.

Types of Workplace Campaign Environments

Degree of structural "hierarchy" High	III. Strong workplace giving decision-making by individual donors where leaders' example matters greatly (e.g., county government, CHS)	IV. Strong workplace giving decision-making by corporate leaders; individuals likely to give to meet expectations (e.g., Duke Energy, Piedmont Natural Gas, banks)
	I. Strong workplace giving decision-making by individual donors (e.g., professional service firms such as Moore and Van Allen)	II. Strong workplace giving decision-making by corporate leaders to relatively flat organization (e.g., Allen Tate, Vanguard, K&L Gates)
Low	Low	High
	Degree of corporate "influence" over workplace campaigns	

In the above matrix, we array workplace campaign partners along two axes: Degree of corporate "influence" over workplace campaign and Degree of structural hierarchy. Interviews indicated that some workplace partners exercise strong leadership in directing the type and nature of the workplace campaign. For example, executive leaders at realtor Allen Tate exercise strong control over the workplace campaign decision making process. They prescribe traditional, closed workplace campaigns – one for United Way, the other for ASC. At the other end of the spectrum, beginning in the 2010 campaign year, individual donors at Mecklenburg County Government make autonomous decisions about their workplace giving, with little to no "intervention" by workplace leadership.

On the vertical axis, we array workplace campaign partners based on their degree of structural hierarchy – which addresses the relative "flatness" of the organization. Professional services firms such as law or accounting firms, tend to be relatively "flat" organizations, where credentialed professionals tend to work in a collegial environment. By contrast, more hierarchical organizations – for example, banks, health care institutions, utilities – are ones in which executive leadership exercises a strong degree of influence over employee decisions.

The results of our research and interviews indicate that Charlotte's workplace campaign partners fall in all four boxes in the matrix, above. Overall, the right-handed quadrant (boxes IV and II) is the most critical: no matter the degree of corporate hierarchy, evidence points to the fact that when workplace campaigns are strongly supported by corporate and workplace leaders, they are the most successful.

Through of the course of our interviews and Task Force discussions, we discovered that while the vast majority of Charlotte's workplace campaigns tend to fall in the "traditional, closed" category, there is a wide spectrum of current workplace campaign practices.

- Duke Energy runs a “traditional, closed” and separate ASC and UWCC workplace campaigns. In-house campaign leaders are carefully selected and follow a proscribed set of activities to widely engage employees in a variety of geographic locations.
- Bank of America hosts a “limited open” campaign which is open to all 501(c)(3) designations; however, United Way is the lead charity, and the vast majority of funds raised are designed to United Way. Bank of America operates its UW campaign from on a national platform. ASC’s campaign is a separate and closed campaign.
- Carolinas HealthCare System runs a “limited, closed” workplace campaign whereby UWCC, ASC and the company’s in-house campaign, the Children’s Miracle Network, are designated as the three charities during a fall campaign.
- Mecklenburg County Government, beginning with the 2010 campaign, will sponsor an “open choice” workplace campaign, where designation to any 501(c)(3) is permitted, and no one charity is given preference over another.

Understandably, Charlotte’s workplace hosts make decisions about the timing and nature of their workplace campaigns. Interviewees have told us that the following factors might have an impact of this decision: a corporation’s national, regional or local policies; a government or nonprofit organization’s responsibility to taxpayers, mission or to Board directives; response to concerns about a federated entity’s leadership or degree of community impact; concerns voiced by employees for increased choice – to name just a few.

c. Continuous Change and Improvement

We know from experience that even the most well-crafted and thoughtful strategy becomes a “dead letter” if not executed well – or not at all. To that end, we offer the following recommendations to our colleagues in Charlotte’s corporate, government and civic communities, as well as to the leaders of ASC and UWCC, as we begin the task of execution. These are the top priority activities that we urge our colleagues to tackle immediately.

i. Investing in Solutions, Not Just Allocating Dollars: Elise Buik of the Greater Los Angeles United Way was very clear: concerns regarding the cost of conducting campaigns and the role of the campaign organizations disappeared for her organization when they adopted goals based on community research that identified issues to address, rather than organizations to fund. If the community believes that they are simply passing dollars through a fundraising organization and losing a portion of the contribution to the cost of the campaign, then they naturally presume that they can directly fund the eventual beneficiary without an additional cost. If, however, the campaign organization has identified issues to address, and the campaign is focused on the issues, rather than the beneficiary organizations that might address the issues, then the concern regarding the cost of the fundraising is removed. Both ASC and UWCC have for

years operated rigorous grantmaking processes that benefit both the recipient organizations and the community. However, they have only occasionally tied their grantmaking to a particular issue that cuts across the whole community. One of the goals ASC and UWCC have begun to pursue on a continuous, rather than occasional, basis is the use of community research and needs assessments as the background and justification for their efforts.

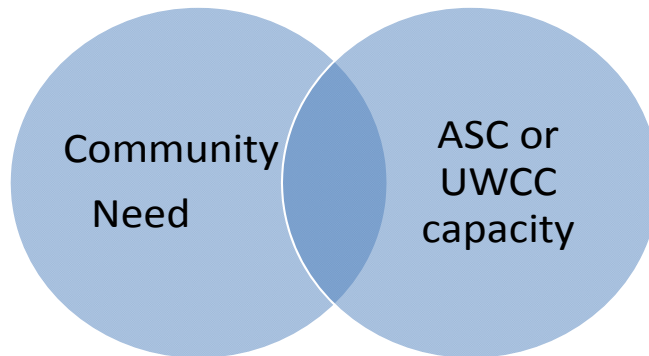
A sea change has been afoot in the world of nonprofit development and funding over the past decade or so. In our exploration of this, we heard loud and clear that most federated organizations have moved – or are moving – toward an issue-based, rather than agency-based, funding strategy. It goes without saying that this dramatic shift has impacted organizational strategy, messaging, funding approach and overall capacity. A few examples paint the picture, below:

- The Arts Fund of Cincinnati reports a shift from “what we support” to “defining what the arts are.” New strategy embraces the issues: how the arts create vibrant neighborhoods so that citizens can “live, work and play” in Cincinnati, resulting in a strong workplace campaign despite economic challenges.
- In 2006, United Way of Greater Los Angeles “wiped the slate clean” and put its funded agencies on notice that all grants would be go to those agencies supporting the UWGLA’s mission of “Building Pathways out of Poverty” through education, financial stability and other means. After a significant transition, the United Way is well on its way toward the goal eliminating the reality of the “Tale of Two Cities”, the gulf between the rich and poor in Los Angeles.
- The Greater Louisville Fund for the Arts changed its recent campaign messaging in a way that communicated that they want to “leave the community even better than when we started.” To that end, they utilized “impact stories” of how arts have enriched individual people in Louisville. In particular, they emphasized examples of partnerships such as the one between the Louisville Ballet and Home of the Innocents, a shelter for homeless disabled children.
- United Way of Louisville discovered that they could make the greatest impact in their community by building partnerships to support Early Learning. With their partners, they support four “learning lab” childcare and community centers under the umbrella of their “Bridges for Tomorrow” initiative.

All the organizations we spoke to started down this path in the same way: through research and community conversations. Following their example, we would urge UWCC and ASC to do the same. Research, especially when provided by a trusted, third-party such as a local university or a Chamber of Commerce, makes the case for the community need.

Determining strategic focus is a function of determining the intersection between the community's most pressing needs and the capabilities and capacity of the federated organization. Finding the "sweet spot" is a process which typically involves a number of stakeholders: the organization's executives, staff and Board, as well as community, corporate and other nonprofit sector leaders. It can be an intensive undertaking; however, as we learned in our research, the results can be significant.

Determining Strategic Focus



It is our hope that UWCC and ASC would take steps in this direction. To that end, we make the following recommendations:

- Workplace campaign organization leadership explore existing sources of community research, such as the *Indicators Report*, authored by the Urban Institute of the University of North Carolina – Charlotte, and data provided by the Charlotte of Commerce to develop a picture of the community's greatest needs
- In partnership with Board, staff and community leaders, ASC or UWCC identify those areas where the community's greatest need intersects with the capability and skills of their organization, resulting in a strategy that embraces "what we are all about."
- Next, and in light of the above, a fairly extensive process of analysis of external strategy, as well as internal capacity for alignment with the governing strategy, will be required. It is likely that the services and expertise of Board members, volunteers, peers and external consultants will be needed during this process.

In this way, the organizations can build coalitions to address critical issues of the community – be it the achievement gap in public high school graduation rates, lack of arts education in the schools or the growing lack of affordable housing in the community. As a result, UWCC and ASC would be a platform of value and relevance from which to lead the community, making the case for their leadership in touching the largest number of the community's neediest citizens.

1. Community Needs Assessment: UWCC is engaged in a “Major Reinvention” process at present, and will be conducting a community-wide needs assessment as this report is being released. ASC conducted a major needs assessment prior to the Cultural Facilities Campaign. Both can continuously update their information about the community and provide it to the community as a public resource, which can be used for good decision-making by the organizations themselves, their nonprofit constituents, their donors and the community at large.

2. Strategic Planning: Each of ASC and UWCC periodically reviews their operations and adopts strategic plans. Because of the downturn, both have been reviewing their strategic plans and will continue to do so as circumstances change during the recovery.

3. Coalition Building: To address the community’s most pressing social issues, and to meet goals, it will be critical for ASC and UWCC to shore up support – financial as well as political – among donors as well as community leaders from many different sectors. Acting as a broker and inviting key players to the table is a role that ASC and UWCC should play – and play well – as these organizations seek broader community support.

4. Choosing Funding Partners: After community needs are assessed, strategic planning is accomplished and a coalition of partners has been built, then the funding partners are chosen. This represents a dramatic change for most workplace campaigns, which have traditionally had a steady group of funding partners to carry out a broad array of activities in the community, and who tended to be assessed on their strength and effectiveness to accomplish their stated mission. However, it may be the case that their mission is not within the purview of the chosen community issue that the needs assessment and strategic planning have identified. It is difficult to contemplate the possibility of de-funding an organization that has been a long-standing partner of a campaign, but it is a necessary part of an analytical framework that compels decisions about how to address a particular issue.

5. Reporting Impact: As ASC and UWCC adopt community goals, rather than organizational goals, one of their strategies will be to continuously update the community on their efforts and their impact. For instance, if an educational goal is adopted, then appropriate metrics can be determined and an annual (or more frequent) report can provide status on the metrics, as well as methods used and the need for any changes, additions or deletions.

ii. Clarity of Purpose and Value: Many of those interviewed mentioned that they were not clear on the purpose and value of ASC or UWCC. Each of the workplace campaigns needs to be sure that they clearly state their purpose and value, as well as any additional goals that they adopt.

iii. Broaden and Deepen the Donor Base: The penetration rate of ASC and UWCC into the community is good, especially compared to national data, but could be broader. In addition, there are other methods, outside of the workplace campaign, that they can use to both broaden and deepen their donor relationships.

1. Cultivating individuals after the campaign: Workplaces have an important responsibility to provide ASC and UWCC appropriate access to donor information. In the past, this was often not possible, as many workplaces do not share the names of individual donors with the campaign organizations. Once available, ASC and UWCC should put effort into continuous cultivation of the community and individuals on a year-round basis, and outside the workplace walls.

2. Expanding geographic reach: Both campaigns have workplace campaign sponsors in many parts of the Charlotte region. However, in terms of funds generated from workplace campaigns, there is a heavy concentration in downtown Charlotte and the Southpark area. They should continue efforts to deepen partnerships throughout the Charlotte region.

3. Seeking Large gifts for special projects: It is often difficult for workplace campaign organizations to conduct fundraising for special projects, because of the concern that it will compete with the organizations they purport to represent. However, if a research-based case can be made for special projects, and the organization is the best leader for the project, a special project can both benefit the community and deepen relationships with donors. A recent example is the Cultural Facilities Campaign conducted by ASC.

4. Using best practices: Workplace campaigns are common enough, and have been studied enough, that the best practices in that arena are well-documented. Both the workplace campaigns and the workplaces where they are conducted should use the well-established best practices for conducting workplace campaigns.

5. Adopting new models: There are some exciting new models being used across the country. The Greater Los Angeles United Way has undergone a transformation that is informative. Many other models can be studied and adopted, as well. Each of ASC and UWCC can review, test and adopt new models on a continuous basis.

iv. Transparency: Particularly during a time of change, transparency in operations and communications will ease concerns regarding decision-making processes and uses of money. However, transparency is always the most important value in creating trust and as such is always necessary to successful fundraising efforts.

Appendices

A List of Interviewees

B. Bank of America: Example of “Lead Philanthropic Partner” Positioning

C. Other Best Practice Examples:

1. Vanguard Campaign Organization

2. Ingersoll Rand Workplace Campaign Review

D. United Way of Greater Los Angeles Transformation

E. Resources Cited

Appendix A

List of Interviewees

The following are among those with whom we conducted interviews:

- Arts & Science Council (ASC)
 - Scott Provancher, President & CEO
 - Laura Belcher, Senior Vice President, Chief Financial & Operations Officer
 - Robert Bush, Senior Vice President, Cultural & Community Investment
 - Patricia Zoder, Foundation For The Carolinas, formerly of ASC
- Fine Arts Fund, Cincinnati
 - Lisa Wolter, Director, Campaign Operations
- Fund for the Arts, Louisville
 - Alison Erwin, Director, Workplace Giving
- United Way of Central Carolinas (UWCC)
 - Jane McIntyre, Executive Director
 - Karla A. Williams, MA ACFRE, Organizational Development Consultant
 - Shannon Young, Vice President of Resource Development
- Metro United Way, Louisville
 - Jill Horn, Workplace Giving
- United Way of King County (Seattle)
 - Shirley Blase, Resource Development Officer - Banking and Insurance
 - Erica Wiley, Associate Director of Business Management, Fundraising
- United Way of Metropolitan Atlanta
 - John Davis, Senior Account Executive
- United Way of Greater Los Angeles
 - Elise Buik, President & CEO
 - Catherine Suitor, Vice President, Development

- United Way Worldwide (Alexandria, VA)
 - Rick Belous, Vice President, Research
 - Karen Brunn, Director, Performance Research
 - Tracy Burns, Account Manager, Global Corporate Leadership
 - Ann Fox, Vice President, Major Gifts
 - Frances Melson, Vice President, Investor Relations
 - Tracy Nilles, Vice President, Global Corporate Leadership
 - Lisa Wilder, Manager, Performance Research

- Social entrepreneurship experts
 - Lauren Bonner, Senior Director, United Way of Massachusetts Bay and Merrimack Valley (Boston), social innovation
 - Susan Daniel, Executive Director, Social Venture Partners Charlotte
 - Phil Grzewinski, CEO of United Way of North Central Massachusetts, Youth Venture
 - Sarah Lester, Director, United Way of Massachusetts Bay and Merrimack Valley (Boston), Youth Venture
 - Karen Oliveira, United Way of North Central Massachusetts, Community Builders
 - Gretchen Zucker, Program Director, Youth Venture, Ashoka

- Workplace giving hosts
 - Allen Tate Company, Pat Riley, President/COO
 - Bank of America
 - Charles Bowman, Finance Business Executive
 - Susan Faulkner, Deposits & Student Lending Executive
 - Henry Fulton, Home Equity & Reverse Mortgage Executive
 - Jennifer Hurd, Corporate Social Responsibility Group
 - Brenda Suits, Senior Vice President, Corporate Philanthropy
 - Carolinas HealthCare System, Michael Rose, President, Carolinas HealthCare Foundation
 - Charlotte Chamber, Bob Morgan, President and CEO

- Rolfe Neill, retired *Charlotte Observer*
- City of Charlotte, Curt Walton, City Manager
- Compass Group, North America
 - Vincent L. Berkeley, Jr., Chief Diversity Officer
 - Rahman Khan, GoodWorks Media Group (formerly of Compass)
- Duke Energy
 - Marc Manly, Group Executive, Chief Legal Officer and Corporate Secretary
 - Richard “Stick” Williams, Senior Vice President, Environmental, Health & Safety, President, Duke Energy Foundation
- Family Dollar
 - Dorlisa Flur, Executive Vice President, Chief Merchandising Officer
 - Kiley Rawlins, Vice President – Investor Relations and Communications
 - Janet Kessler Wilson, Divisional Vice President, Corporate Human Relations
- K&L Gates, Gene Pridgen, Administrative Partner, Attorney at Law
- Mecklenburg County Government
 - Harry L. Jones, Sr., County Manager
 - Jennifer Roberts, Chairman, Board of County Commissioners
- Moore & Van Allen, Dan Clodfelter, Member, Attorney at Law
- National Gypsum Company, Bill Parmelee, Vice President and Chief Financial Officer
- Piedmont Natural Gas, George M. Baldwin, Managing Director, Legislative & Community Affairs
- Wachovia, a Wells Fargo Company
 - Jay Everette, Community Affairs Manager - Greater Charlotte, Corporate Social Responsibility Group
 - Laura Schulte, President, Eastern Region Community Bank
 - Tami B. Simmons, Director of Philanthropy – East

Vanguard, Tom Hirsch, Manager

Appendix B

Bank of America: Example of “Lead Philanthropic Partner” Positioning

As stated in the body of this report, the strong recommendation of the Workplace Giving Task Force is that regardless of workplace campaign environment, ASC or UWCC should be positioned as the lead philanthropic partner. In the case of one combined campaign, we recommend that ASC and UWCC be permitted to share this role.

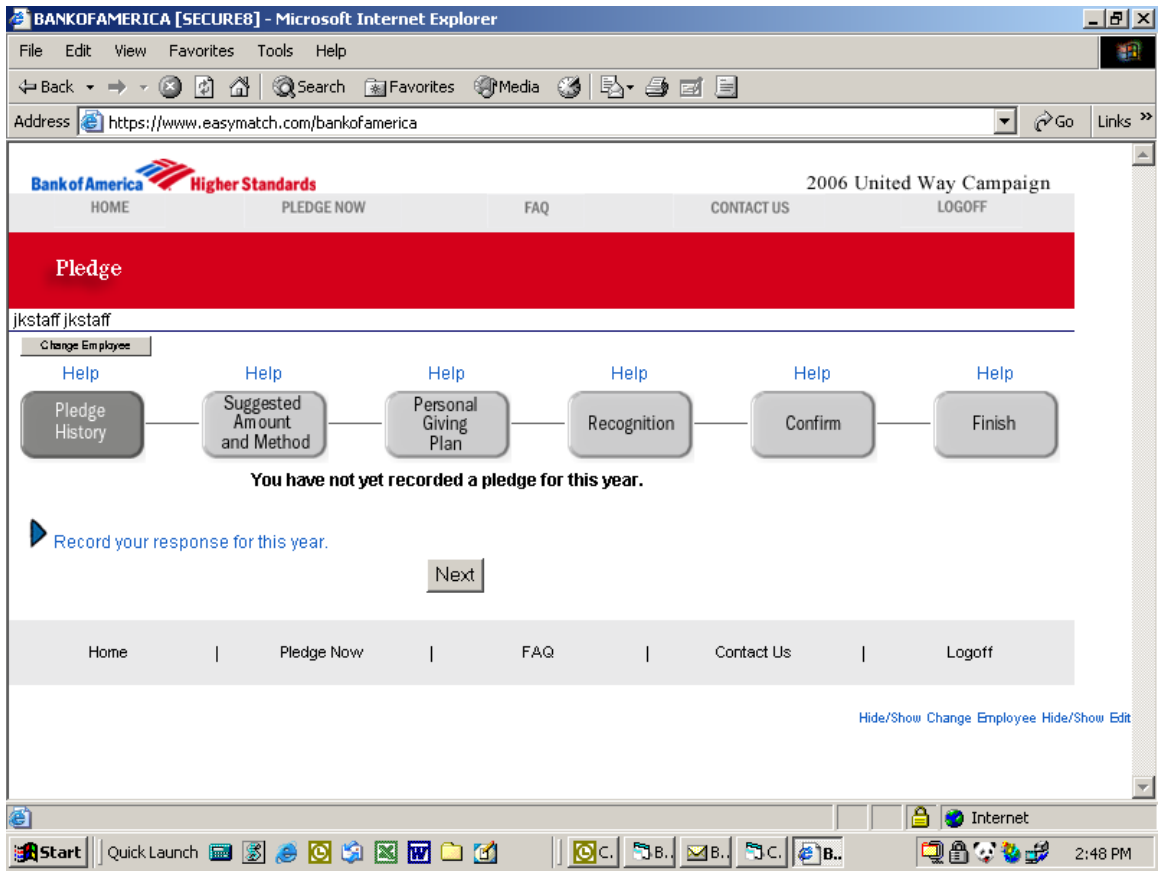
What does “lead philanthropic partner” look like, practically speaking? To answer this important question, we turn to a real corporate example, the national Bank of America United Way campaign. This is what they call “an open, United Way branded” workplace campaign.

As seen below in a series of screen shots from the Bank of America 2006 United Way Campaign on-line pledge process, a number of themes are observed:

- Company name and United Way share top billing
 - “2006 United Way Campaign” and the company name and logo are featured consistently at the top of every screen
 - Indeed, www.unitedway.bankofamerica.com was the campaign website address for the 2008 campaign
 - Checks are payable to “Bank of America United Way Campaign”
- Focus is on local United Way
 - Donors are guided to the local United Way first, before being offered selective giving options
 - Donors may choose to be recognized by the local United Way

In addition to the above, the screen shots provide a fine example of outstanding overall best practice in on-line pledging. Steps are logical and easy to follow. The donor is provided with a suggestive giving amount and offered choice in terms of payment options. He or she is given the option of being recognized for the gift. And, as a last step, the donor has a chance to confirm his or her pledging choices.

Following the screen shots, there are two examples of literature that Bank of America produces for its employees and campaign managers.



BANKOFAMERICA [SECURE8] - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address <https://www.easymatch.com/bankofamerica>

Bank of America Higher Standards 2006 United Way Campaign

HOME PLEDGE NOW FAQ CONTACT US LOGOFF

Pledge

jkstaff jkstaff

Change Employee

Help Help Help Help Help Help

Pledge History Suggested Amount and Method Personal Giving Plan Recognition Confirm Finish

Select Pledge Amount and Payment Method

Part A - Suggested Gift and Payroll Deduction [Suggested Giving Guide](#)
A gift of \$1 per pay period and \$48 annually is recommended based on your previous giving history and suggested giving level. [Help](#)

Yes, this is what I want to do.
 I'd like to pledge a different amount.

Please withhold \$ 0.93 Per Pay Period \$ 48.36 Annual Amount.

I do not want to make a pledge during this campaign.

Part B - Other methods of payment (if not using payroll deduction)

Personal Check
Make check payable to **Bank of America United Way Campaign.**

Done Internet

Start Quick Launch C. B. B. C. B. D. 2:48 PM

BANKOFAMERICA [SECURE8] - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address <https://www.easymatch.com/bankofamerica>

Bank of America Higher Standards 2006 United Way Campaign

HOME PLEDGE NOW FAQ CONTACT US LOGOFF

Pledge

jkstaff jkstaff

[Change Employee](#)

[Help](#)
[Help](#)
[Help](#)
[Help](#)
[Help](#)
[Help](#)

[Pledge History](#)
[Suggested Amount and Method](#)
[Personal Giving Plan](#)
[Recognition](#)
[Confirm](#)
[Finish](#)

Pledge Type: **Per Paycheck Deduction** Annual Amount: **\$48.36**

You may target your contribution by using one or more of the following options.

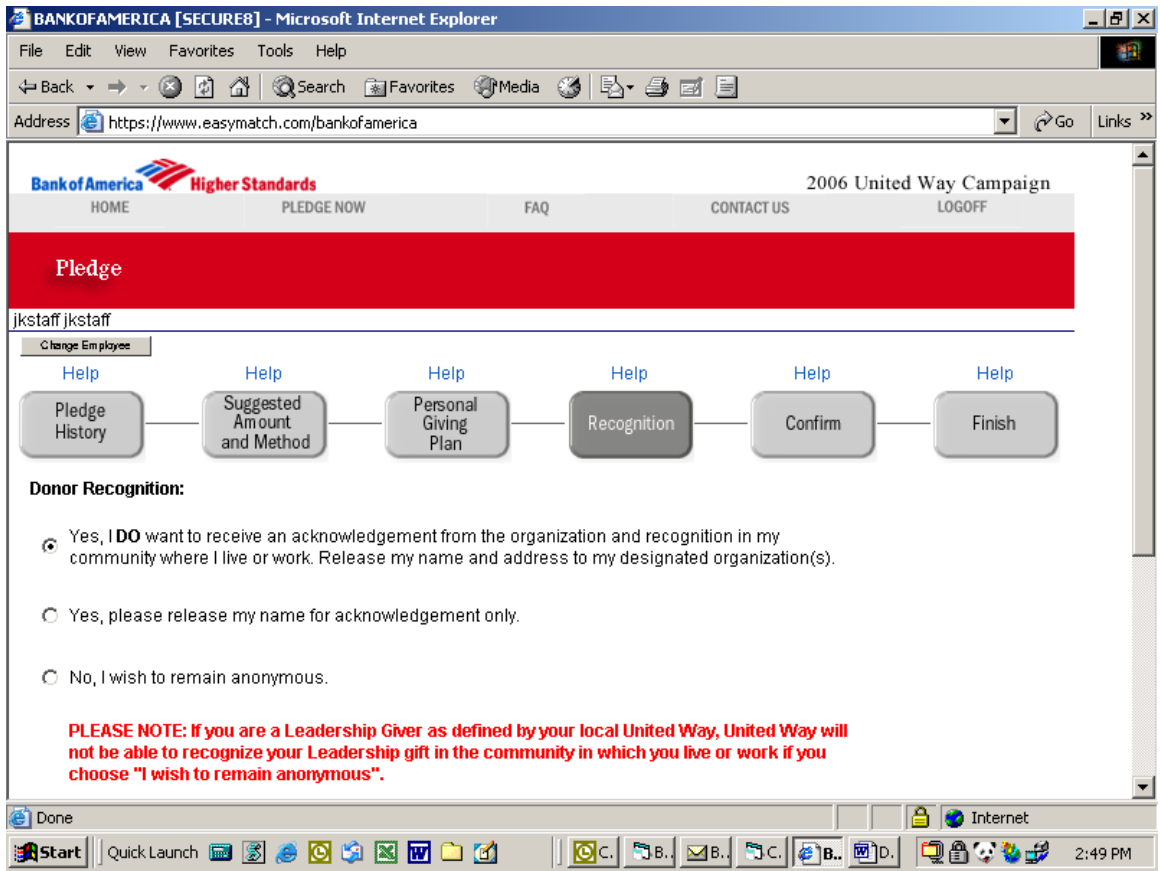
Organization Name	Annual Amount
United Way of Greater Mercer County, Inc. <i>(United Way serving my home location)</i> Purpose/Program Help	\$48.36

Selective Giving you may give to your favorite nonprofit organization. (Minimum \$24 donation annually.)
 Click on a link below to search for an organization

[Search for or write-in a charity](#)

Start Quick Launch Internet

2:49 PM



BANKOFAMERICA [SECURE8] - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address <https://www.easymatch.com/bankofamerica>

Bank of America Higher Standards 2006 United Way Campaign

HOME PLEDGE NOW FAQ CONTACT US LOGOFF

Pledge

jkstaff jkstaff

[Change Employee](#)

[Help](#) [Help](#) [Help](#) [Help](#) [Help](#) [Help](#)

[Pledge History](#) — [Suggested Amount and Method](#) — [Personal Giving Plan](#) — [Recognition](#) — [Confirm](#) — [Finish](#)

Your United Way Campaign pledge is almost complete. Please take a minute to review the information. Use the "Back" button or the links below to return to previous pages if you need to make changes.

ID	Organization	Pledge
2289320	United Way of Greater Mercer County, Inc. - Lawrenceville, NJ	\$48.36/year
(Payment Method: Payroll Pledge) Total		\$0.93/Period \$48.36/year

Payment Method: Payroll Pledge

Donor Recognition: Yes, I **DO** want to receive an acknowledgement from the organization and recognition in my community where I live or work. Release my name and address to my designated organization(s).

Your name as it will be released to organizations or used internally for recognition purposes:

Internet

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Address <https://www.easymatch.com/bankofamerica>

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jkstaff jkstaff

[Change Employee](#)

[Help](#) [Help](#) [Help](#) [Help](#) [Help](#) [Help](#)

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Your name as it will be released to organizations or used internally for recognition purposes:

Internet

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BANKOFAMERICA [SECURE8] - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address <https://www.easymatch.com/bankofamerica>

Bank of America Higher Standards 2006 United Way Campaign

HOME PLEDGE NOW FAQ CONTACT US LOGOFF

Pledge

jkstaff jkstaff

Change Employee

Help Help Help Help Help Help

Pledge History Suggested Amount and Method Personal Giving Plan Recognition Confirm Finish

Thank you, jkstaff jkstaff, for pledging online. Below is your recorded pledge(s) for the 2006 Bank of America United Way Campaign.

You may re-enter this site at any time during the campaign to [revise your pledge](#). You will be sent a confirmation e-mail within 48 hours of completing your pledge process, and again on the last day of the campaign, at which time your pledges are final. If you do not receive a confirmation or have further questions, please feel free to [contact us](#).

Please Note: To help keep the administrative costs at a minimum, there is a \$150.00 payment threshold for all recipient organizations receiving funding from the campaign. Payments to organizations are made on a monthly basis and will not be disbursed if the payment for the month does not total \$150.00. All payments that do not reach \$150.00 throughout the year will be disbursed by 12/31/06.

Print Please print this confirmation page using either your browser's print icon or the PRINT button to the

<https://secure8.easymatch.com/BANKOFAMERICA/Content/employee/>

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WHERE YOU WORK WHERE YOU LIVE SOMEONE WILL BENEFIT FROM WHAT YOU GIVE

For more than 70 years Bank of America and United Way have partnered to create positive change in our communities. Your contributions have helped us achieve a number one ranking among financial institutions supporting United Way over the past twenty years. We value your support – whether financial or through volunteerism—as we work collectively to improve the communities where we live and work.

Below are details about how you can Live United. For additional details, talk to your team leader or visit the campaign website at unitedway.bankofamerica.com.

HOW TO GIVE

1. COMPLETE THE PERSONALIZED PLEDGE FORM OR PLEDGE ONLINE.

Verify sections 1 and 2 on the preprinted form. If you use a blank form, include name, person number, team number, charity code and mail code in the top box.

2. REVIEW SUGGESTED GIVING AMOUNT AND SIGN UP FOR PAYROLL DEDUCTION.

You may choose to pledge an amount other than the suggested gift. Payroll deduction starts January 2009 and continues every pay period throughout the year. A pledge calculator is available on the campaign website.

3. INDICATE OTHER METHODS OF PAYMENT.

If you don't use payroll deduction, check off any other payment method: check, stock, credit card or direct bill. One-time gift by credit card:* Your credit card will be processed on 12/15/08 or 1/5/09 based on your selection when confirming your pledge. The transaction will appear on your credit card bill as "Easymatch." Please round all pledges up to the next full dollar amount.

4. DETERMINE WHICH FUND YOUR GIFT SUPPORTS.

Your pledge automatically supports the local United Way Community Fund where you work. If you do not want to support the fund where you work, you may direct your contribution to the United Way fund in the community where you live or in another city.

5. SELECT SPECIFIC NONPROFIT ORGANIZATIONS.

You can also choose to direct your gift to any other tax-exempt nonprofit organization. Be sure to include the organization's complete name and address.

6. VERIFY PLEDGE AMOUNT.

Please confirm that all designated annual amounts equal your total annual payroll pledge as indicated on the top section of the pledge form.

7. SIGN AND DATE COMPLETED PLEDGE FORM.

Submit your online pledge or sign the completed pledge form and return by **December 5**. (Fax to 1.609.799.4638 or seal in enclosed envelope and send interoffice mail, NC1-001-02-09.)

For questions about the processing of your gift, call the Bank of America United Way Customer Service line at 1.866.295.5597 (8 a.m. to 8 p.m. EST).

8. RESPOND NO MATTER HOW YOU LIVE UNITED.

If you choose to Live United through your own resources and volunteerism, your response is still important, because response is a key goal for our campaign. Please check the box in section two of the online or printed pledge form. Then submit online or fax or send the completed paper form. (See step 7.)



Lou Zicarelli: Card Group Sales; Laura Simpson: Communications Manager; Lashawn Carter: Affinity Banking; Paul Thompson: Quality & Productivity

GIVING GUIDE

Varying circumstances will determine the level of support each associate is able to provide. This chart is a reference you can use as a guide for giving.

SALARY	SUGGESTED GIVING %	SUGGESTED ANNUAL GIFT
less than \$8,000	0.60%	\$1 – \$48
\$8,000 – \$14,999	0.60%	\$49 – \$90
\$15,000 – \$19,999	0.80%	\$120 – \$160
\$20,000 – \$29,999	1.00%	\$200 – \$300
\$30,000 – \$59,999	1.50%	\$450 – \$900
\$60,000 – \$124,999	2.00%	\$1,200 – \$2,500
\$125,000 and above	2.50%	\$3,125 +

\$1 minimum payroll deduction (per pay period), \$1,000 minimum direct bill, \$24 minimum specific designation

* If you choose 12/15/2008 as your credit card transaction date, you may take the charitable deduction in the current calendar year. However, if you choose 1/5/2009 as your credit card transaction date, your charitable deduction will be taken in calendar year 2009. The transaction will appear on your credit card bill as "Easymatch." A processing fee will be deducted from all donations made by credit card. This fee varies based on credit card type.

**JOIN HANDS.
OPEN YOUR HEART.
LEND YOUR MUSCLE.
FIND YOUR VOICE.**



2008 BANK OF AMERICA UNITED WAY CAMPAIGN THE LEADER'S GUIDE

Thank you for your leadership in our 2008 Bank of America United Way Campaign. Through your involvement as a Team Leader, you will help us strengthen the health and vitality of our communities.

While the campaign's main objective is to raise funds, response is also critical to the success of our campaign. Our goal is 100% response from each of your teammates—some associates will choose to donate, some associates may Live United through other activities—however, we need everyone to complete their pledge card via online or mail. We have created a number of tools, including the materials in this kit and a robust campaign website at unitedway.bankofamerica.com, to help you energize your team.



Bianca Fraser-Johnson, Card Group Sales

HERE'S HOW YOUR TEAM CAN LIVE UNITED:

GENERATE SOME MAGNETISM

Your mission is to BRING INSPIRATION TO THE TEAM.

By creating a compelling campaign, your dedication will bring results.

- Educate your team about United Way. Your local chapter can help provide details about important issues in your community. Locate them through our campaign site.
- Develop a plan. Include lively events, appealing incentives and some grass-roots marketing, too.
- Build response. Emphasize that contributions are completely voluntary and not related in any way to the associate's career at Bank of America.
- Distribute results. Download reports from the campaign website to help keep excitement strong.
- Commend your team. A simple e-mail or a Spirit Card goes a long way to reward their commitment and hard work.

TALK FROM THE HEART

One of the most powerful tools you have to encourage response is a

ONE-ON-ONE CONVERSATION with each of your teammates that highlight:

- United Way's mission is a natural fit with Bank of America's commitment to promote positive change—helping people in our communities improve their health, education and financial well-being.
- Every pledge counts. One contribution combined with those of more than 200,000 associates can make a huge difference.
- Be a role model. Participate in Team Bank of America United Way Days of Caring volunteer events, and invite your colleagues, friends and family to join. What a great way to see how you can make life better in your community!

PLAN A POWERFUL KICK-OFF

The key to early and generous participation is a KICK-OFF that captures your team's attention and encourages response for the right reasons. Here are the ingredients:

- A rousing welcome from a senior manager. Start with introductions all around.
- A guest speaker or associate who can speak first hand about the services United Way provides and/or share his or her Live United experience. Your local United Way can help identify speakers.
- Promote the 2008 Live United Sweepstakes to encourage early response.
- Show your team how easy it is to participate and get them excited to Live United.

CARD SERVICES ADVERTISING
FILE NAME: KC-05-08-0559.F_new.indd
JOB#: KC-05-08-0559.F
USER: christofides, Natalie
PREV USER:
DATE: 8/6/08 - 2:42PM
CREATED: 7/25/08 - 4:25PM
SAVED: 8/5/08 - 5:05PM
PRINTED: 8/5/08 - 5:05PM
W ADGES: united_way_lol_cmyk.eps, Bianca team leader.tif
DOC PATH: Users\nbk12ee\Desktop\KC-05-08-0559.F_new.indd
PRINT SCALE: 100%
DOC SIZE: 8.5" X 11"
COLORS: C=0 M=0 Y=0 K=70, C=0 M=100 Y=81 K=0, C=100 M=56 Y=0 K=0, PANTONE 468 C

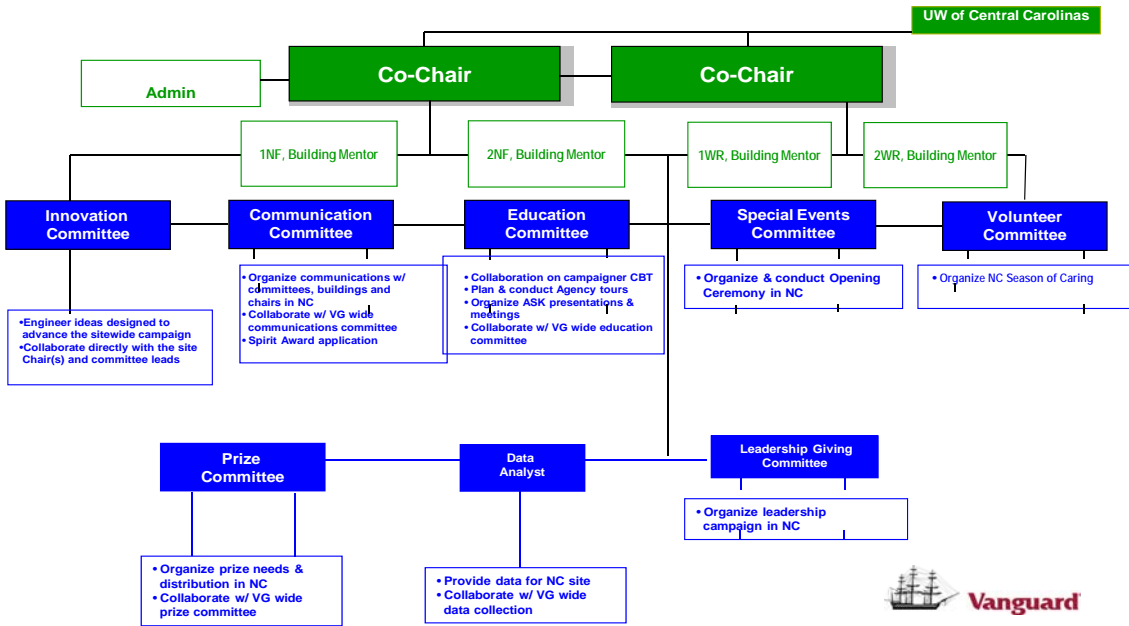


Appendix C

Other Best Practice Examples

1. Vanguard Campaign Organization

2. Ingersoll Rand Workplace Campaign Review





2009 BUSINESS REVIEW





Table of Contents

To present the performance of the 2009 United Way campaign, I have chosen to report on the various activities in a business case format. To translate the activities into a business format, some terms have been replaced with business references, see below:

Donations = Revenue

Employees = Customers

% Employee Engagement = Market Share

Employee Donation Amount = Price

United Way Events = Products

Enterprise/Sector = Government

United Way = Brand

Campus Leaders = Strategic Accounts

Business Review Content

- 2009 Performance Summary
- Long Range Plan (LRP)
- Organization Leadership Review (OLR)



2009 Performance

The 2009 United Way campaign for the Davidson Campus was a success exceeding our expectations by raising \$302,000 as compared to the \$235,000 raised in 2008. This year's campaign was focused on offsetting the negative headwinds associated with the economic impact of the recession and the negative press in 2008 associated with the compensation package for the previous CEO of the region. The positive momentum of last year's campaign gave us a great leverage point to work from.

The underpinning of our strategy for 2009 was to increase revenue by increasing market share. This was derived by the favorable fact that our market share in 2008 was approximately 15% as measured by employees making financial contributions of any sort. Also, given the poor general economic conditions the probability of gaining revenue from price (increasing individuals giving amounts) was determined to be a low probability requiring significant resource investment. We also determined that we were going to have to employ extra defensive marketing strategies to preserve or mitigate the impact of price deflation.

The products that were in our portfolio in 2009 consisted of Jeans Day, Kid's Fishing Derby, Ice Cream Social, Silent Auction, Golf Tournament, Leadership Campaign, and General Campaign. Each of these served a unique purpose and was intended to complement each other as part of executing the overall strategy.

Jeans Day: This is a product that is intended to reach a broad market given the price point of \$5 and the main contribution is brand awareness. This year we offered this product once on St. Patrick's Day tying it to the corporation's new affiliation with Ireland. This product in the market is losing its effectiveness for two reasons; competitive pressure and change in government regulation. In recent years competitors' such as The Green Team have entered the market with their own Jean's day thus diluting the effectiveness of our product. Additionally in 2009 regulation changes permitted jeans on Friday without any financial contribution from the customer thus reducing the value proposition of our product when brought to market. We were fortunate that we offered our product prior to the regulation change thus were able to generate \$730 by selling to 146 customers.

1st Annual Kid's Fishing Derby: This was one of our new products launched in 2009 intended to support our market share strategy by providing brand awareness as well as defensive marketing targeted at existing customers. This event allowed us to target a specific vertical market; customers with young children. We did not set a price for this



product but were relying on the psychological impact of reciprocity to cause voluntary donation at the event or sales of future products. All donations went directly to the Barium Springs Home for Children. We did generate modest revenue of \$510 by selling to 75 customers. Feedback was very positive and ideas for next year include local press involvement and UW agency involvement.

Ice Cream Social: This was the last event in the summer before our primary fund raising events. The primary intent of this event was to familiarize employees with the benefactors of their donations by having four local agencies in attendance. We set the event up similar to a mini trade show with each agency showcasing their services. We also partnered with the local Ben & Jerry's to defray the ice cream cost by allowing them the opportunity to promote their business to our employee base. For this event we introduced 250 employees to the agencies in attendance.

Silent Auction: Similar to last year, this event used an on-line auction format to solicit bids from employees for goods and services donated from local retail establishments as well as employees. The key focus area for this event was to bring a diverse portfolio of products that would target all demographics with an array of price points. The underpinning of the event strategy was to promote the event to encourage participation and extract the maximum percentage of their spending budget. The portfolio of products consisted of 280 items up from 149 items in 2008. We increased our customer participation from 221 to 268 resulting in total revenue of \$22,900; a 46% increase.

Golf Event: The changes this year for the golf event yielded the highest year-over-year incremental financial impact of the campaign. To take this event to the next level, we targeted adjacent markets and adjusted the value proposition to extract maximum revenue. The adjacent market we targeted was supplier partners to Ingersoll Rand. In exchange for donations ranging from \$3,000 - \$5,000 they received 3 spots in the event and were paired with an Ingersoll Rand executive to complete their foursome. This yielded 13 sponsors and \$45,000 in revenue. The other goal for the event was to promote the event to fill our plant (golf course) capacity to 100%, this was achieved with 144 golfers up from 112 golfers in 2008. The key to meeting our capacity targets was viral marketing, traditional promotion on campus via email and print media, and holding the price point from last year at \$100. With another successful event feeding the viral marketing for next year, we have the opportunity to revisit our price point to extract maximum revenue while still maximizing our plant utilization. Total event revenue netted \$46,000.



Leadership Campaign: A new event in 2008, our strategy this year was to build on the success of last year with slight but impactful modifications. The first modification was to expand our classification of strategic accounts (leaders) to the top 45 on campus which was loosely defined as Vice Presidents or higher going down 3-4 levels below the CEO. This was vetted extensively to ensure that we preserved the integrity of the strategic account status given how this group is marketed to. The primary point of sale was the leadership reception where all the leaders were invited to attend, 70% attended. The keys to success of this event were: 1. schedule it on a date to ensure maximum participation by Enterprise Leadership Team, 2. create an environment that was professional and welcoming, 3. leverage the United Way leadership and Ingersoll Rand leadership in the selling process. The individual attention and subliminal influence of executive leadership involvement are key to educating this group of customers and influencing their buying decision. Of the 45 leaders, we captured 65% market share, with an average sale of \$1,620 per customer for a total event revenue of \$47,000 versus \$2,220 and \$53,300 in 2008 respectively.

General Campaign: This part of the campaign has been in the portfolio the longest targeting all campus employees, other than strategic accounts. The strategy here was all about growing market share and this is the culmination of the marketing plan that started in the beginning of the year. The event was the last two weeks of October but the direct marketing plan started a week before with the daily agency spotlight emails. Throughout the first part of the year, I did many informal market surveys to understand the obstacles that kept customers from buying; the most significant was the misperception that their money went nationally not locally. Thus, a key part of our marketing was focused on educating the market on the features and benefits of our product, specifically that the donations stayed. Other marketing efforts consisted of campus signage, event tracking at the front entrance, and daily raffles. The newest marketing tool we tried this year was to daily give "Live United" t-shirts to anyone who pledged the previous day with an invitation to a cookout on the last day of the campaign. Rationale behind this was employees would be more apt to cross sell to other employees on the premise of attending the cookout as a group. In total, the results reflected the impact of the strategy with 196 employees participating up 39% from 2008, yielding 25% of the total population. As expected, the average donation per employee went down to \$173 versus \$217 in 2008. Total event revenue was \$34,000, a 33% increase from last year.

The results for 2009 exceeded our expectations with total revenue of \$302,000 including company match, which is a 29% increase over prior year with campus employment down 24%.



2009 Long Range Plan - LRP

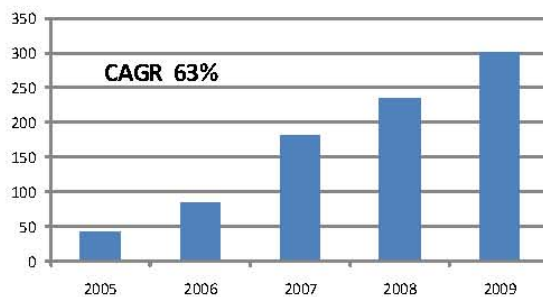
The Davidson campus campaign has built up tremendous momentum achieving double digit year over year revenue growth. To continue this trend, I recommend three focus areas for the upcoming years.

Davidson Campus Campaign: This year we captured about 25% participation of the current campus population. Applying an array of assumptions shows the potential for the campus campaign to reach \$1 million including the company match. Continuing to provide executive support, deeper integration with the Enterprise, and capturing the new Climate Control Sector's engagement as they grow on campus are a few of the keys to continued growth of the campaign.

National Campaign Coordination: With the multitude of Ingersoll Rand locations across the United States, having a centralized subject matter expertise coordinating with the locations would drive national performance. Many of the administrative burdens of an effective campaign can be managed centrally leveraging the expertise in Davidson. Also, providing best practices and introductory orientation would remove the initial barriers to participation of an overwhelming burden for already resource challenged sites. Finally, being able to drive improvement nationally and articulate that performance would be a great press opportunity.

Volunteerism: We started in 2009 to explore the concept of offering volunteering opportunities to the campus employees on a regular basis throughout the year in conjunction with local United Way agencies. Obstacles that we made progress with this year were the logistics of coordinating with the agencies and developing an effective and efficient way of communicating opportunities to the employee base. The introduction of the effort at the Enterprise level to create a volunteerism forum could provide a leverage point to include the United Way agency opportunities.

IR Davidson Donations to United Way





2009 Organization Leadership Review - OLR

Given that the United Way committee is comprised of volunteers, it is critical to make sure the composition of the team is effective. There are four primary positions that it is important to understand for a successful campaign.

Executive Sponsorship: This person is critical to opening doors into the executive population and providing the sustainability of the cause. It is critical to have this person be part of the Enterprise Leadership Team and passionate about the cause. Looking back to the trend for the last five years, there is a high correlation to the success of the annual campaigns and the engagement of the Executive Sponsor.

Campaign Chairperson: This is the lead position for the annual activities of the campaign, currently a one year term. My recommendation of the profile for this position would be a Director or Vice President who has been in their current position greater than one year with an interest in charitable work. This position will allow them to exercise many general business skills including, marketing, sales, management, and an array of interpersonal skills.

Campaign Coordinator: This person critical part of the team serving as the primary contact for United Way related to the tactical and strategic execution of the campaign. They maintain the donation system as well as various details related to all events. Given the knowledge required to perform this role effectively, the ideal person has a technical system aptitude and willing to perform this role for a multi-year term.

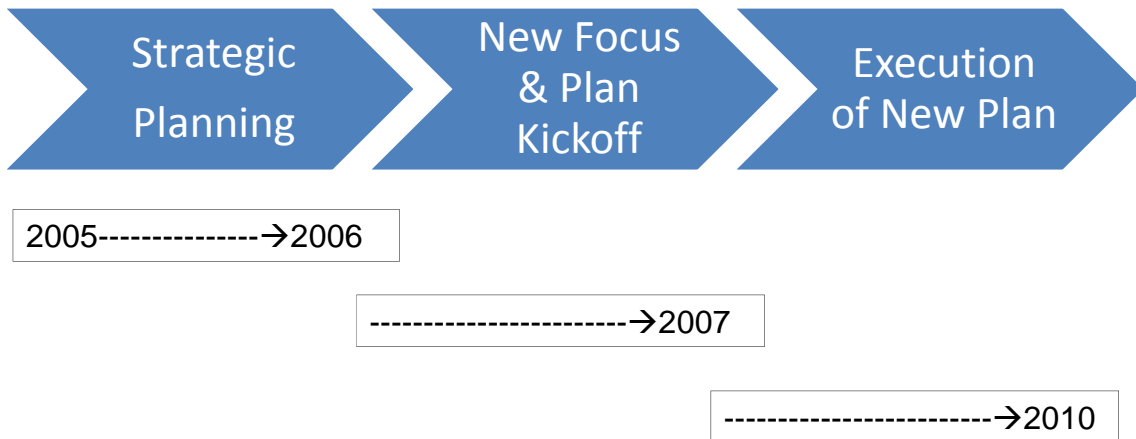
Campaign Committee: The composition of the committee is critical to the success of the campaign. I recommend that the composition consist of three primary groups; (3-4) Senior Leadership Team level Vice Presidents, (3-4) Senior Leadership Team direct reports level, (3-4) Managers or staff positions, (2-3) younger high potential employees. There are two primary pitfalls associated with committee composition. One is that if the committee is too heavily weighted with executives, the other members will be overwhelmed with the tactical execution duties of the committee. If the team is composed too heavily of junior level member, there will be multiple difficulties gaining collaboration with the executive team.

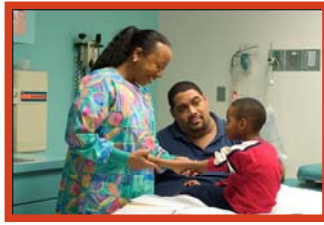
Appendix D

Greater Los Angeles Transformation

In the pages that follow, there are examples of some of the work that the United Way of Greater Los Angeles has done during its multi-year work of transformation. This on-going process began in 2005, and continues through 2010.

UWGLA Transformation Process: Chronology





Providing affordable housing and healthcare

Our 10-year plan provides long-term solutions in the 3 interconnected areas that are the root causes of poverty



Offering job training and placement and providing financial education



Helping students graduate from high school prepared for college and the workplace

LIVE UNITED  **TO CREATE PATHWAYS OUT OF POVERTY**

INCREASING FINANCIAL STABILITY

GOAL INCREASE 10,000 ADULTS' INCOME LEVELS THROUGH JOB TRAINING AND PLACEMENT

UNITED WAY OF GREATER LOS ANGELES
CREATING PATHWAYS OUT OF POVERTY

USING WORKFORCE DEVELOPMENT TO MATCH JOB TRAINING TO BUSINESS STRENGTH

Focusing our workforce development on growth industries like health care, logistics, and green jobs, which are not likely to be outsourced and provide good incomes and career advancement.

Requiring job training partners to bring employers with jobs to the table versus training people first and then finding them a job.

RESULT In a dismal economic climate, 3,500 people were placed in jobs

USING FREE TAX PREPARATION AS THE GATEWAY FOR BROADER EDUCATION AROUND FINANCIAL TOOLS

Free tax preparation provides a natural way to help people learn about managing a budget, opening a bank account or enrolling in a matched savings account.

RESULT Almost 40,000 people had their taxes prepared at over 180 free tax sites across the county, resulting in over \$13 million claimed in Earned Income Tax Credit

BRINGING BUSINESS, GOVERNMENT AND NONPROFIT PARTNERS TOGETHER

Formed three workforce partnerships to make sure that businesses, the County, the City and the State align their resources to make the greatest impact in the community.

Educating government, business, funders and partners about the importance of job training and ways to maximize training efforts that include:

- Providing support systems like child care.
- Having trainees move as a group so they have a peer support system.
- Providing work readiness certificates which are valued by businesses.

RESULT LA Workforce Funder Collaborative invested \$1.6 million in workforce development

DOUBLE THE VALUE OF YOUR GIFT

Thanks to the Mullin-Miller Match Fund, we will match, dollar for dollar, any new gift you give to our Creating Pathways Out of Poverty plan, or any increase to your previous gift.



2009-10 60/K #108

GIVE
GiveUnitedLA.org
VOLUNTEER
VolunteerUnitedLA.org

Appendix E

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