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# **United Way Worldwide**

Cross Market Partnerships aka “CROG”



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# Mike Kerkorian

## Director, Corporate Relations

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5 Years Resource Development at Heart of West Michigan United Way  
2 Years Corporate Relations at United Way Worldwide

American Express

Aetna

BNY Mellon

Citi

Deloitte

IBM

Macy's

MetLife

Pitney Bowes

Pfizer

Travelers Insurance

Xerox

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# Agenda

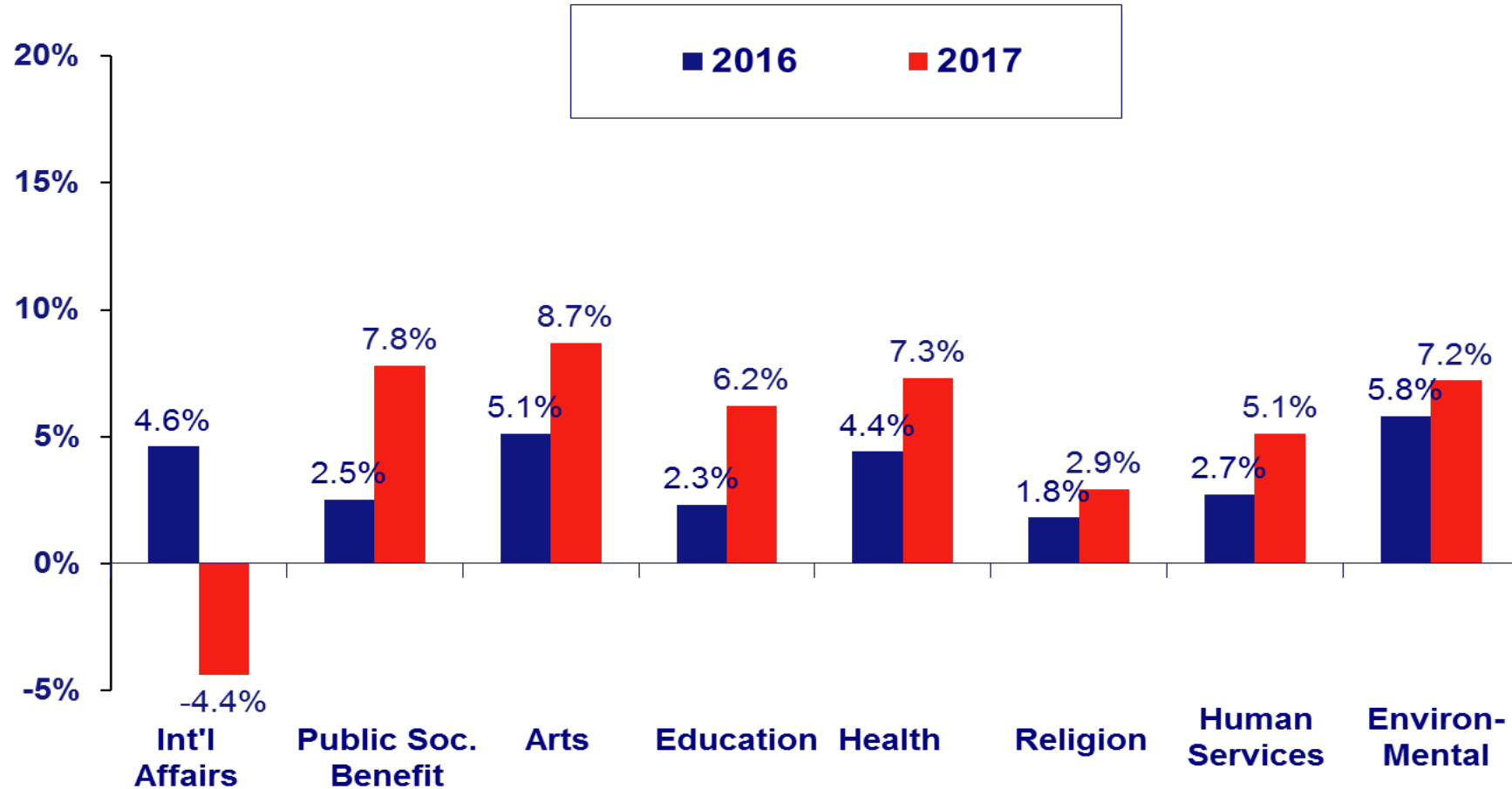
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- Current Giving Environment
- What is CROG?
- Why CROG?
- CROG Examples
- How to CROG?
- Q&A

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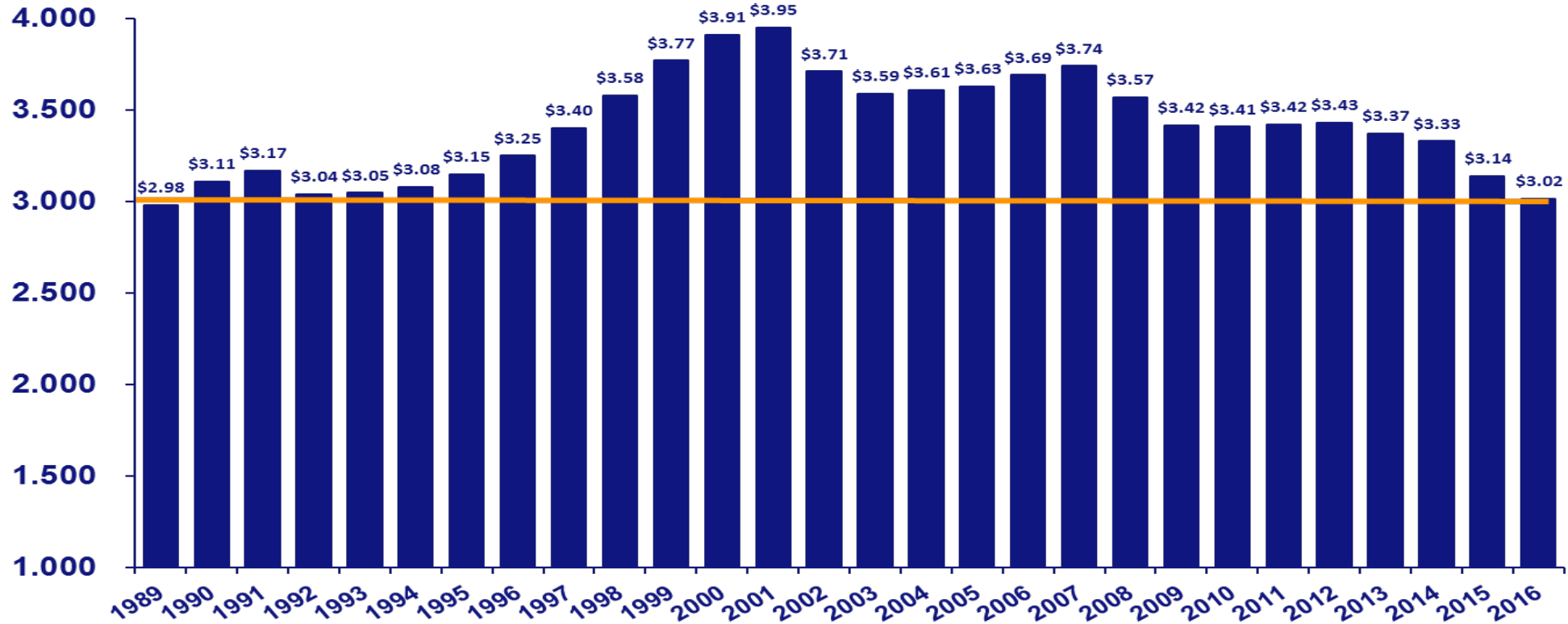
# Growth in Philanthropic Sectors



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# United Way Campaigns in the U.S. Have Declined to Pre-1990 Levels



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# Corporate Relationships are United Way's #1 Asset

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## Opportunity

- Unparalleled geographic coverage and organizational scale – Global, National, Local

## Opportunity

- 45 Million Employees within Workplace Channel

## Opportunity

- Diverse Impact Work – Education, Income, Health

## Opportunity

- Brand Value of \$10+ Billion

## Opportunity

- Loyal Contributors and potential to realize their giving

# Corporate Challenges

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## Challenge

- Reduced or eliminated corporate match

## Challenge

- Disengaged C-Suite and Executive Turnover

## Challenge

- Eroding Workplace Campaign due to opportunity elsewhere

## Challenge

- Campaign Structure changes including Evergreen and Open Campaigns

## Challenge

- Technology and lack of donor details



# NETWORK-WIDE STRATEGY OVERVIEW

## Unique Positioning

- ▶ **Integrated Solutions**
- ▶ **All Sectors Work Together**
- ▶ **Local Depth – Global Scale**
- ▶ **Invite Millions of People**

## Key Actions





# What is CROG?

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- CROG = Corporate Relations Operating Group
- Vision = **ONE United Team**. United Ways and United Way Worldwide will work as one to drive increased donors and revenue with our largest partners. We will succeed by clearly understanding the needs of each partner, working together, sharing resources and creating a strong universal template for corporate relationships that will create positive change.

# Why CROG?

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- Companies have spoken and want relationships that:
  - Add business value
  - Engage C-Suite/ CSR leadership with strong account management
  - Offer meaningful employee engagement
  - Align with company impact goals
  - Build brand reputation
  - Deliver solutions consistently across markets
- Work Together: We are only as strong as our “weakest link”
- United Way Benefits:
  - Partnership Agreements
  - Real time communication and sharing of best practices to influence current campaign
  - Recover/ Improve at- risk company relationships

# Who is CROG?

## UW CROG Markets

1. Greater Twin Cities United Way
2. Mile High United Way
3. United Way of Central Carolinas, Inc.
4. United Way of Central Indiana
5. United Way of Greater Atlanta
6. United Way of Greater Cincinnati
7. United Way of Greater Los Angeles
8. United Way of Greater Milwaukee & Waukesha County
9. United Way of Massachusetts Bay and Merrimack Valley
10. United Way of Metropolitan Chicago
11. United Way of New York City
12. United Way of the Bay Area
13. United Way Toronto & York Region
14. United Way Worldwide

## CROG Launch

1. Anthem
2. Bank of America
3. Deloitte
4. GE
5. Macy's
6. PwC
7. Target
8. UPS
9. US Bank
10. Wells Fargo

## Round 2

1. Accenture
2. AT&T
3. BMO\*
4. Citi
5. Comcast
6. Deere
7. Dow
8. Duke Energy
9. Eli Lilly
10. EY\*
11. Fifth Third Bank\*
12. General Mills
13. GM
14. Kellogg's
15. Kroger\*
16. J&J
17. Miller Coors\*
18. Nationwide
19. Publix
20. SunTrust

## Network Driven

1. Farmers
2. Rockwell Automation
3. Bayer
4. Anheuser Busch
5. Bridgestone
6. Florida Power & Light
7. Raymond James
8. Kaiser Permanente
9. Vectren
10. NIPSCO
11. IU Health
12. Ivy Tech
13. St. Vincent
14. Enterprise
15. National Grid
16. Zion Bank
17. JE Dunn
18. Fed Ex
19. Canadian Companies

# CROG Company Criteria

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- Significant company size, \$\$, RUM, or donors
- Geographic spread of markets
- Headquarter willingness or other inner circle markets willing to take on leadership role
- At risk or big opportunity
- Ability for our efforts to create a positive change

# What CROG Really is?

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## United Way Perspective

- Centralized Account Management
- Shared accountability across geographic boundaries
- Shared goals/ metrics developed with companies
- Team thinks globally, nationally, regionally; then locally
- Increased capacity and competency
- Real-time/Constant communications

## Company Perspective

- Coordinated, customized relationship management
- Perceive United Way as business AND philanthropic partner of choice
- Create business value through a customer-centric approach
- Enhance relationship to solve staff engagement/ community impact needs

# CROG Example - Deloitte

## Deloitte Team

- Executive Sponsor: Sheena Wright, NYC
- UWW Account Lead: Mike Kerkorian
- Key HQ Contact: Meaghan Brown, NYC
- Priority Markets: DC, Chicago, NYC, Atlanta
- Other Key Markets: Charlotte, Detroit, Indy

## Account Objectives (Deloitte)

**Talent Engagement:** Support optimization and transformation of the volunteer experience

**Brand Enhancement:** Showcase our ability to solve wicked problems

**Relationships:** Strengthen relationships through purpose-driven collaborations

**Impact Ventures:** Drive social impact

# Deloitte – Account Objectives

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**Pro Bono Support (Talent Engagement):** Facilitate connections for Deloitte to provide pro bono support to United Way and their nonprofit partners

**Alternative Spring Break (Talent Engagement):** United Way Worldwide and United Way of Greater Atlanta deliver an amazing week of service for prospective Deloitte employees

**Deloitte Impact Day (Talent Engagement):** Support Deloitte offices in connecting with local volunteer opportunities as needed for Deloitte Impact Day (June 8, 2018)

**Brand Lift (Brand Enhancement):** Create brand lift for Deloitte by focusing on a social media message that drives a powerful impact message about Deloitte in the community. Potential social media blitz during Impact Day again in 2018.

**Deloitte WorldClass (Impact Ventures):** United Way will provide counsel to Deloitte regarding their WorldClass Initiative – goal is to improve 50 million futures by mobilizing Deloitte associates around the world

# Deloitte – Account Objectives

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**Campaign Innovation:** Either repeat digital series with new stories and Write a Note Campaign or come up with new campaign idea to be launched nationally. Innovation should focus on millennial employee engagement.

**Campaign Improvement:** Provide United Way training to local Deloitte Campaign leaders with the goal of improving relationship and access to Deloitte employees at a local level.

**Strategic Agreement:** Move forward with annual extension of agreement (signed/agreed by December 2018)

**Leadership/Influencer Meetings:** Execute key influencer calls/meetings with local Deloitte influencers. This includes a meeting between Deloitte Executive Sponsor Sheena Wright and Cathy Engelbert (Deloitte CEO) in NYC

**Salesforce Philanthropy Cloud:** Pilot Salesforce Philanthropy Cloud with a group of Deloitte employees in Fall 2018



# CROG Lessons Learned

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- Relationship Mapping/Key Influencer Conversations are essential
- Importance of listening and synthesizing needs through discovery
- Companies consistently site three priorities that we can jointly plan for and execute on:
  - Individual employee engagement
  - Impact/ CSR alignment and planning
  - Brand/reputational lift
- Work across markets to determine appropriate corporate solutions and bring in other priority markets as needed
- Corporate solutions focus on company needs, but also advance UW
- Corporate solutions require cross-functional alignment

# How to CROG?

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## Step#1 - Planning

- Identify Headquarter Market and other key markets that the company cares about
- Have Call with markets and do relationship mapping and identify key influencers

## Step #2 - Communicating

- Leverage appropriate United Way staff to have discovery conversations and explore company needs around impact, employee engagement, and reputation
- Schedule calls with United Ways to discuss info and decide on account objectives

## Step #3 - Executing

- Create Account Plan with joint goals and shared deliverables
- Consult with other staff within your United Way, so everyone is supportive
- Communicate regularly

# How to support CROG efforts?

- Support the customer-centric, network first approach
- Create a regional / local CROG effort: choose a company that is asking for new value and consistency across markets
  - ✓ Determine an account point-person on your team
  - ✓ Call or meet with other key market United Ways of those companies to share information regularly
  - ✓ Include cross-functional staff in joint account planning
- **Online Toolkit available at <https://online.unitedway.org/cross-market-corporate-partnerships>**

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# CROG's Future

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- Add markets to existing CROG companies
- Add strategic companies to CROG Process
- All GCLs using CROG model
- Networkwide Adoption – All United Ways support and participate in multi-site corporate relationships

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# Q & A

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What questions do you have?



Thank you.