

**“The baby boomer generation built United Way. Now 80 million boomers are headed out of the workforce, and about 80 million millennials are coming in. We have to figure out how to connect with this first generation of ‘digital natives.’”**

—Brian Gallagher, United Way Worldwide

When donations to United Way of Metropolitan Chicago dipped dramatically at a Chicago-based company renowned for its generosity, a study of 21st century donors helped identify the reason. “Millennials don’t want any part of an electronic fundraising campaign that involves multiple menus and steps,” explains Brian Gallagher, president and CEO of United Way Worldwide (UWW). “And this company hires a ton of millennials.”

In response to the declining numbers, company leaders partnered with UWW to develop “One-click Chicago” – a program that enables employees to learn about United Way’s mission and pledge their support with a single keystroke. The results were immediate and gratifying. Giving among millennials increased by 94 percent, and the number of individual donors soared from 700 to almost 1,300. The success confirmed two widely held assumptions: Major changes are under way within today’s workforce, and United Ways around the nation need to explore new strategies to engage and grow their donor base.

# United Way: As You Like It



IT'S A  
DO-GOOD  
TIME

Equally important is the need to maintain connections with those boomers who are departing the workforce and who risk slipping into what Gallagher calls the “lapsed donor” category. “These are folks who have given to United Way for 40 years but when they retire, we lose them because our relationship has always been through their employers. When we inquire, ‘Why did you stop giving to United Way?’ the most common answer we hear is, ‘Because no one asked me.’”



### Making the appeal more appealing

All that is about to change. United Way Worldwide is applying what it learned from an Endowment-funded research collaboration with the Indiana University Lilly Family School of Philanthropy to study workplace giving trends throughout the country. Researchers learned that donors were interested in more connection to the causes they support and about the importance of providing immediate feedback to donors about how dollars are making a difference. Now, supported in part by a \$6.6 million Endowment grant in 2015, UWW has launched a three-year initiative to update and streamline its interactions with traditional and emerging donors.

John Lechleiter, UWW board chair and chairman, president and CEO of Eli Lilly and Company, endorsed UWW's grant proposal to the Endowment, and he is pleased to see how the initiative is evolving. "As a leader of a major pharmaceutical enterprise, I appreciate the importance of research and innovation," says Lechleiter. "United Way Worldwide's commitment to continual learning and improvement enables it to build on its strengths and thereby expand its impact and broaden its appeal to new donors. This initiative holds great promise for the future of United Ways across the country."

Under the initiative, a dozen large United Ways – United Way of Central Indiana (UWCI) among them – will serve as laboratories that will capture and catalog donor interests and preferences, create messages and opportunities based on those interests and preferences, and send personalized communications via the channels that donors like best. Local United Ways across the country will be able to access the data,



Lourdes Bonilla (above, left), an Indianapolis high school sophomore, and her United Way of Central Indiana mentor, Alexis Dean (above, right), visit an Indianapolis art gallery. Dean is part of Emerging Leaders, a United Way program.

tap into the technology and customize the market-tested messages that emerge from the initiative.

"Our society has changed in a big way," says Ann Murtlow, president and CEO of UWCI. "Those changes have been marked by advancements in technology that now make it easier to communicate with people on an individual level. United Way is all about bringing together people to solve big problems, and the way we do that in 2015 is very different than the way we did it 20 years ago."

She cites a recent "thank-you campaign" as an example. An email message, developed by the digital staff at UWW and tested by initiative participants, reached out to donors by name and with content that was tailored to each recipient. "The message was simple, conversational and relevant," says Murtlow. "People opened it quickly and clicked all the way through to a survey that asked them to share information about themselves and their interests. It included a write-in question that invited them to tell why they were engaged with United Way."

Future messages to these same donors will reflect and build on data that the survey collected. "Some people might be interested only in education or only in health, and they don't want to receive general information on everything else that we do," says Murtlow. "Our intent is to communicate with people where they are and about specific issues that concern them. We want to connect their passions with the work that needs to be done in their communities."

### Mobilizing millennials

In many ways, UWCI was an early leader in efforts to reach beyond traditional donors and cultivate a new generation of supporters. In 2006, a pair of recent college graduates accepted the challenge of co-chairing a get-together for friends at a trendy jazz club near the Butler University campus in Indianapolis. "Our goal was to get young professionals involved in the community through United Way and, at the same time, slow the brain drain in central Indiana," explains Lindsay Harmon, a private banker at the National Bank of Indianapolis, and one of the event's hosts. They hoped that as many as 50 people would attend. But three times that number turned out to hear their pitch. By the end of the evening, 137 young professionals had signed on as charter members of the group, which was aptly named "Emerging Leaders." Each person demonstrated support by agreeing to make an annual contribution of \$1,000.

"Everything about the Emerging Leaders surprised me," recalls Ellen Annala, who was president and CEO of UWCI at the time. "They established a steering committee,

designed their own program, asked for mentors and turned out in droves for service projects. I wondered if we could keep up with their energy. I also wondered if their interest would wane, but it never has.”

Instead, participation has grown as members have continued to introduce innovative projects to address community needs. In 2015, the group organized a recruitment event and gave representatives of local youth-serving agencies five minutes each to summarize their missions and describe volunteer opportunities. Each Emerging Leader then had the opportunity to sign on with a group that stirred a personal interest.

In 2016, Emerging Leaders plans to introduce a new program called Chalk Talk. Fashioned after Ted Talks, it will



feature six Emerging Leaders who will make video presentations about their career paths. The videos will be made available to partnering K-12 schools for inclusion in their curricula. Teachers will have the option of inviting the presenters to interact with students about the educational requirements of their professions.

“Millennials want holistic experiences,” says Katie Hammer, 2015 chair of the Emerging Leaders steering committee. “They want to be engaged, make an impact and serve as advocates for the organizations that they support financially.”

### One size doesn't fit all

Whereas the Emerging Leaders organization is geared to volunteers under the age of 40, a more recently formed group called Link accommodates those Indianapolis professionals under the age of 30. It's an effort to connect with a younger set of millennials and to begin considering engagement with

Emerging Leader Dan Reecer (above) is a literacy tutor volunteering with Indianapolis Public Schools. Katie Hammer (right) helped start the Emerging Leaders program of United Way of Central Indiana.

the emerging Generation Z, people born since the mid- to late-1990s. The idea was developed and piloted in several cities participating in the UWW initiative and then was customized by UWCI. “We are an early adopter of the product,” explains Murtlow. “We have been delighted with the response. Young people have welcomed the opportunity to network in a social setting and learn about the challenges in the community. We typically include some kind of work project, like assembling healthy snack packs for kids.”

By dividing millennials into smaller, age-specific groups, UWW has discovered that what works with 35-year-old donors may be less successful with 20-year-old volunteers. In short, one size doesn't fit all. “We talk about the millennial generation as a big monolithic thing,” says Gallagher, but differences in age, gender and location necessitate certain adjustments and tweaks. “This grant initiative allows us to use data to better understand individuals and their preferences.”

The characteristic that is common to all millennials is their reliance on digital communication.

But even online preferences vary, with younger users quick to vacate one social media domain in favor of another. When baby boomers settled comfortably into Facebook, millennials fled to other sites. The challenge for United Way is to keep pace with change and know how to reach specific populations.

“Millennials want to do everything on handheld devices – not on paper and not on a desk top,” says Gallagher. “This means the United Way experience has to be compatible. Whereas the digital world is going at 80 miles an hour, we've been traveling at 55. The initiative will help us get up to speed.”

Gallagher and his leadership team are optimistic about the anticipated outcomes of their efforts. Fast forward a few years and Murtlow predicts United Way will be perceived as a year-round experience that caters to people's individual interests. This perception will replace the dated image of a giant thermometer that appears once a year to track progress toward a financial goal. “People will have a greater understanding of the fact that we are a very strategic, community-impact organization as opposed to an organization that simply raises funds.”

