



Give at Work:

Hidden Gems & Real-World Successes

Stratus**LIVE**

MEET THE SPEAKERS



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StratusLIVE



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CSR Program

Specialist

StratusLIVE

AGENDA

- About Session/Intro
- Real-World Successes
- Hidden Gems
- On the Horizon
- Q&A





GIVE AT WORK 2024

32

Clients

2,174

Campaigns

\$105M

Total Raised

201k

Donations

\$807k

Largest Gift

\$7.4M

Largest
Campaign

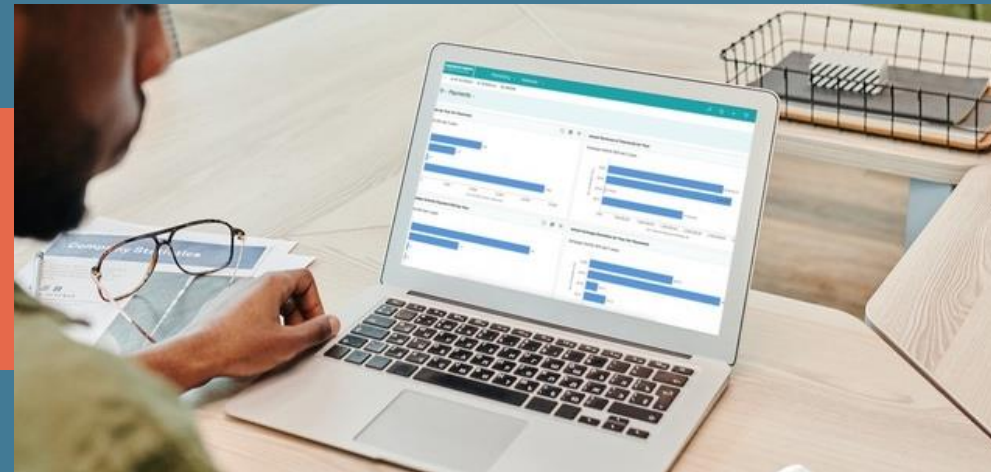
1,330

Support
Tickets

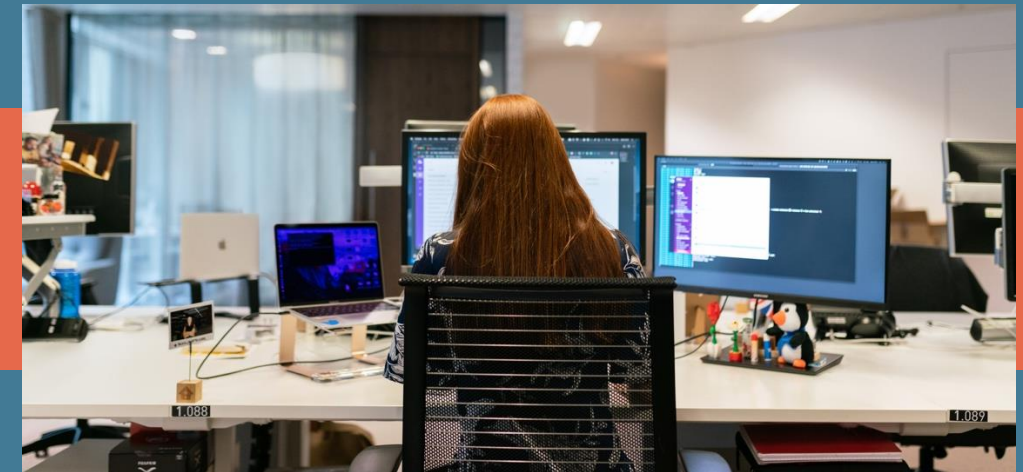
REAL-WORLD SUCCESSES



Simplified Coordinator Reporting



Tailored Campaign Messaging



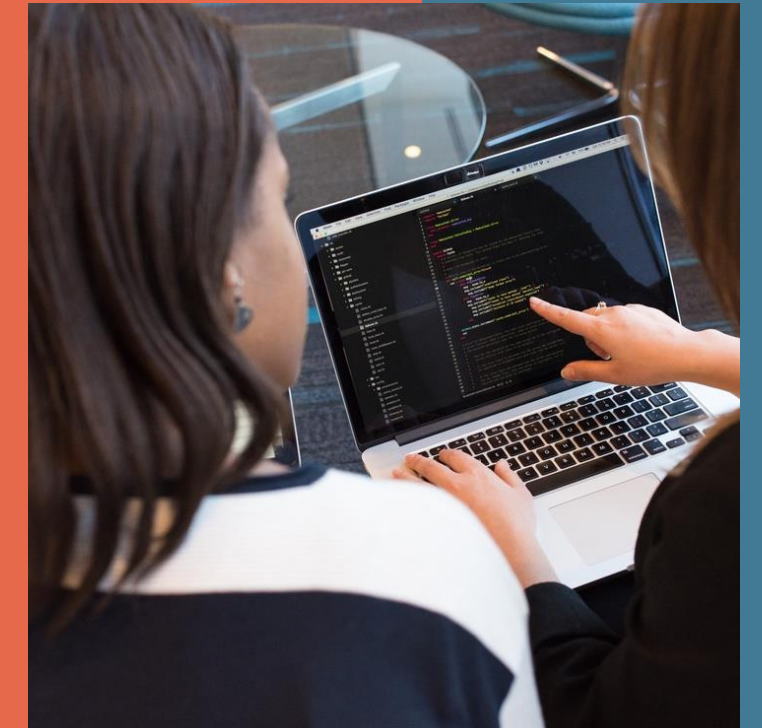
Positive Reinforcement

Showcasing work from:

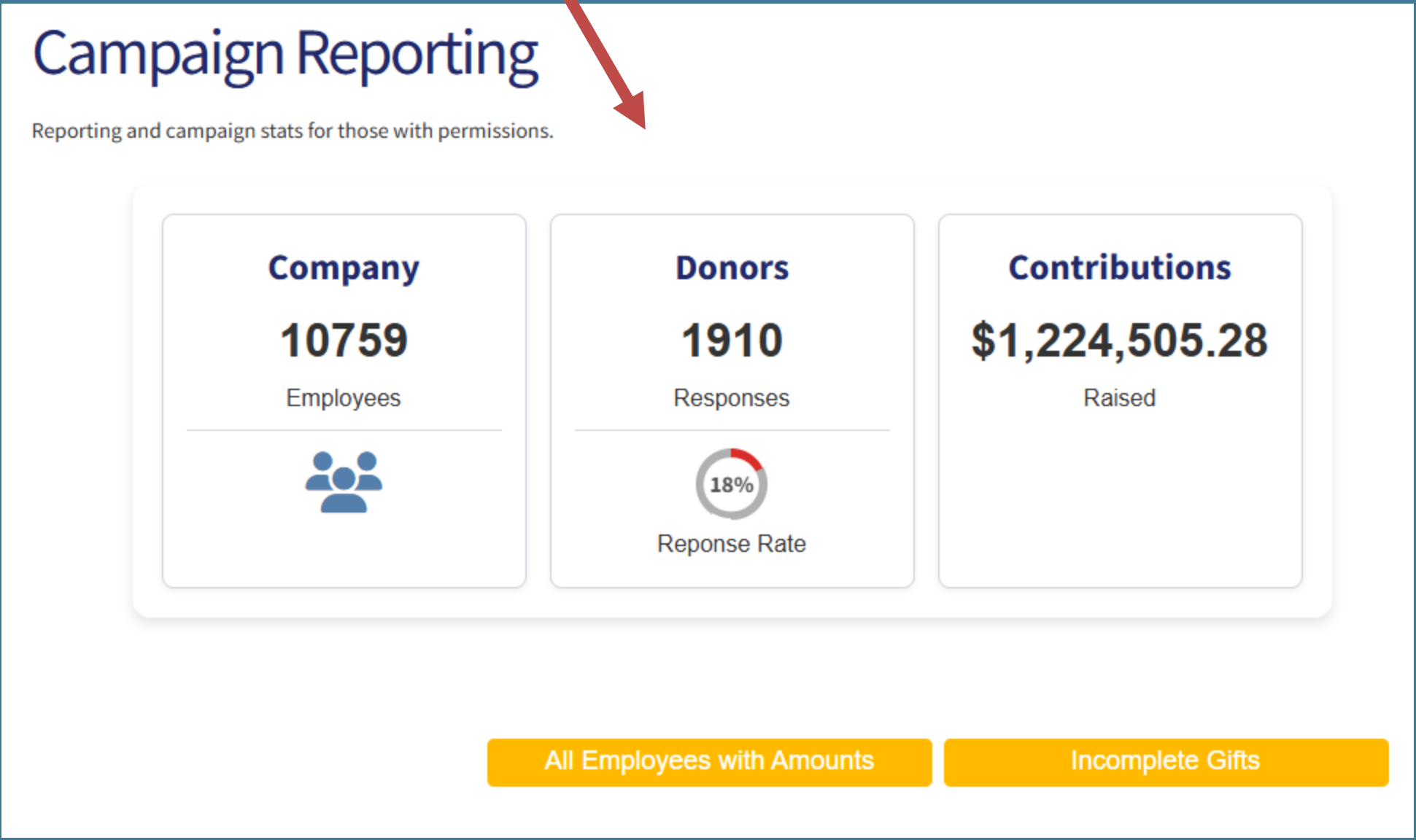
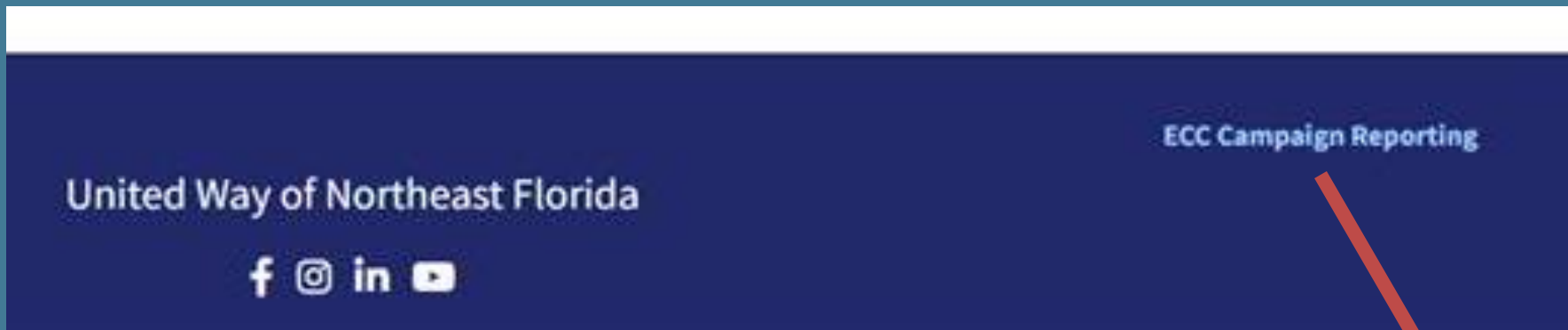


SIMPLIFIED COORDINATOR REPORTING

The **Campaign Impact, Contribution Extract and Roster Extract Widgets** work together to provide quick access for Coordinators to both high-level site performance metrics and targeted, actionable campaign data.




SIMPLIFIED COORDINATOR REPORTING



SIMPLIFIED COORDINATOR REPORTING

Company
2036
Employees



Donors
40
Responses

2%

Reponse Rate

Contributions
\$52,233.90
Raised

\$1,305.85


Average

\$25.66

Per Capita

Campaign Report

Company
605
Employees



Donors
82
Responses

14%

Reponse Rate

Contributions
\$877,627.00
Raised

\$10,702.77

Average

\$1,450.62

Per Capita

NON-RESPONDENTS

DONATIONS WITH AMOUNT

United Way of Greater Milwaukee & Waukesha County

414.263.8100 | [UnitedWayGMWC.org](#) | [Privacy Statement](#)

For assistance, contact donor@unitedwaygmwc.org.



TOOLS TO USE

CAMPAIGN IMPACT WIDGET

- Configure metrics within Widget
- Can be used for Employees and/or Coordinators
- All Campaigns or Donor's Active Campaign
- Explicit User Authority Coming Soon!!

EXTRACT WIDGET

- Roster and Contribution extract available
- Independently configurable
- Pick and choose fields to create custom extracts

LAYER RULES

- Who gets to see the Widgets?

ROLES

- Extract widgets depend on extract permissions on the role
- When testing you must be logged in as the user (INCOGNITO!)



TAILORED CAMPAIGN MESSAGING

Deliver site content on a more granular level with **Segmentation Messaging** and **Roles**. You set the groups and levels that need to see a different message and tie it to employee records for customized experiences.



TAILORED CAMPAIGN MESSAGING



Preparing Young Children
for Life



Helping Students
Succeed

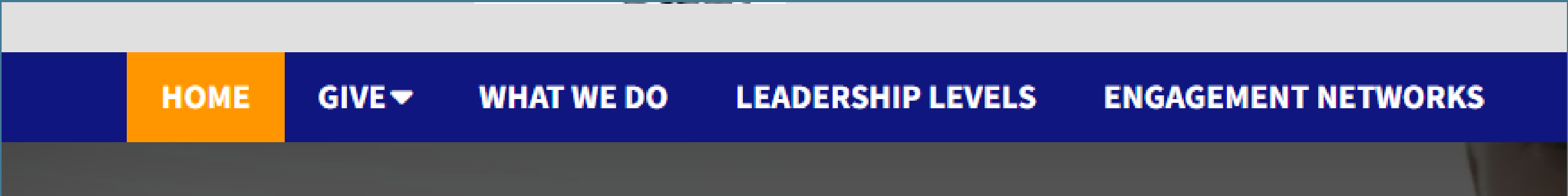
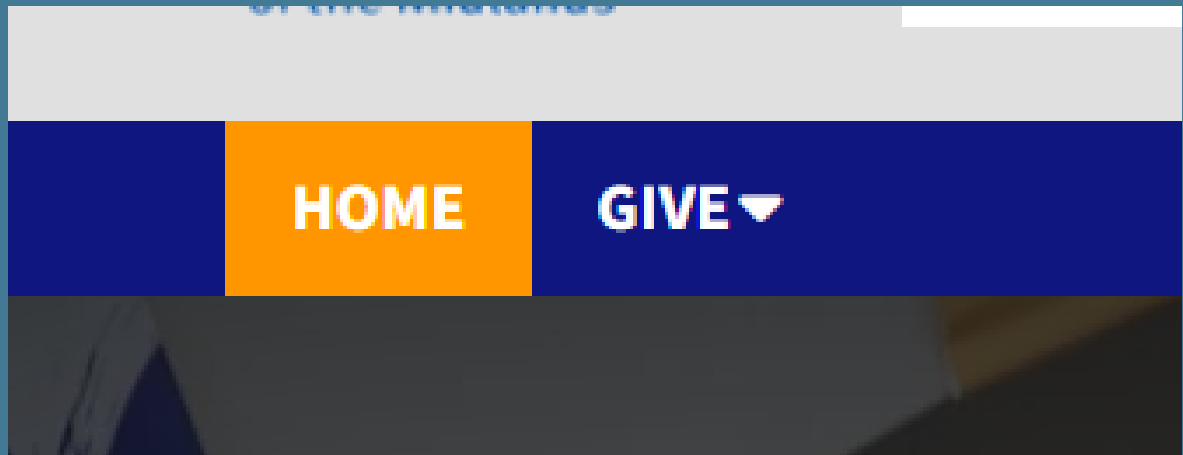


Fostering Self-Sufficiency
for Individuals and
Families



Supporting People in
Crisis

TAILORED CAMPAIGN MESSAGING



TAILORED CAMPAIGN MESSAGING

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Your company has partnered with United Way of Greater Milwaukee & Waukesha County to administer your campaign.

United Way does not sell or trade information about its contributors to any other organization or person.



United Way

UnitedWay.org | [Privacy Statement](#)

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TAILORED CAMPAIGN MESSAGING



1 SELECT PAYMENT METHOD

2

3

4

5

Thank you for your gift last year of \$1,200.

Select Payment Method

⬅

Line of Business	# Employees	# of Donations	Total Giving	% Participation
+ Department 1	37		\$0	
+ Department 2	95		\$0	
+ Department 3	398	2	\$6,510	0.50%
+ Department 4	1755	1	\$3,000	0.06%
+ Department 5	258		\$0	
+ Department 6	2		\$0	
+ Department 7	90		\$0	
+ Department 8	141	2	\$3,500	1.42%
+ Department 9	73		\$0	
+ Department 10	90		\$0	
+ Department 11	18	1	\$2,000	5.56%
Total	4049	8	\$19,910	0.20%

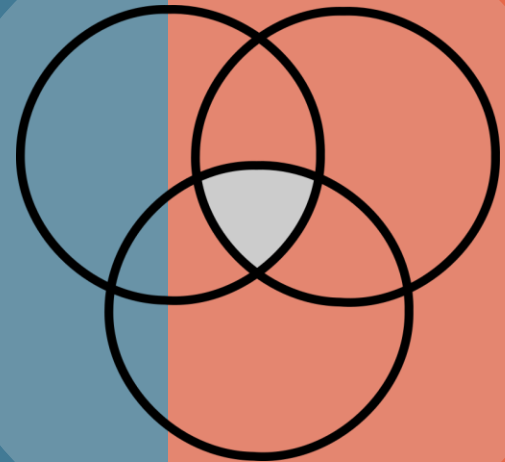
10/15/2024 1:07:24 AM
Last Refreshed

77%

Microsoft Power BI

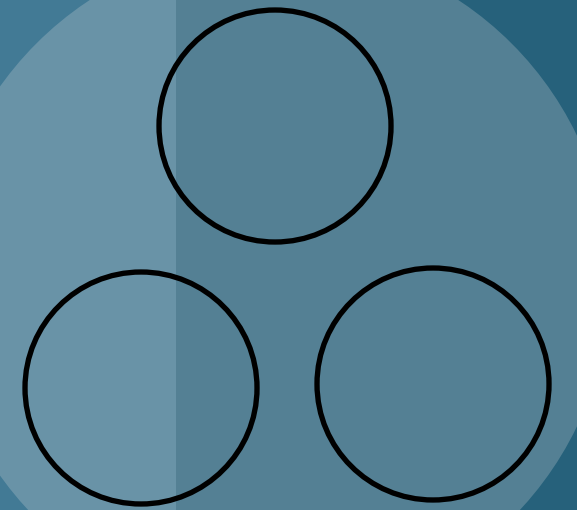
● HOW DO WE DECIDE?

SEGMENTATION MESSAGING



- Individually personalized information
- Matrixed messaging
- Incomplete data
- Must be HTML Widget content

ROLE BASED LAYER RULES



- Group based messaging
- Mutually exclusive, collectively exhaustive
- Can be used with any type of widget

TOOLS TO USE

SEGMENTATION MESSAGING

- Develop messaging matrix
- Configure levels, groups and rules
- Stack messages within Segmentation Widget

TOKENS

- Deliver individually personalized data

MENU WIDGETS

- Multiple menu widgets

LAYER RULES

- Who gets to see the Widgets?

ROLES

- Include in your recipe for ease of use





POSITIVE REINFORCEMENT

Use **Incentives** and **Workflows** to boost engagement and participation in your workplace giving campaigns.

Whether you're offering branded merchandise, recognition opportunities, or special events access, your customized incentives will help maximize the impact of your workplace giving campaign.

POSITIVE REINFORCEMENT

1

2

3 SELECT MEMBERSHIP GROUPS

4

5

Choose Membership Groups

Your gift may have qualified you to join one or more of these membership groups

☐ Emerging Leaders

☐ Women United

Details

**The parameters for Membership Groups will vary by location. If you are not in San Antonio, please forward your information to your respective United Way.*

Tocqueville Society

Tocqueville Step-Up

Step-Up Description:

- You can participate in a 2 or 3 year step-up to donate at the Tocqueville level. Please indicate if you wish for us to contact you regarding this.

☐ I would like to join Tocqueville Society Step-Up

< Previous

Continue

Incentive Program Name

Actions

Tocqueville Step-Up [Rank/Sort Order: N/A]

Edit | Delete

Incentives

Add New Incentive Template

Incentive Name

Actions

Tocqueville Step-Up24 - All Donors

Edit | Delete

Criteria

Add New Criteria

Criteria Name

Actions

Total annual contribution amount

Edit | Delete

Premiums

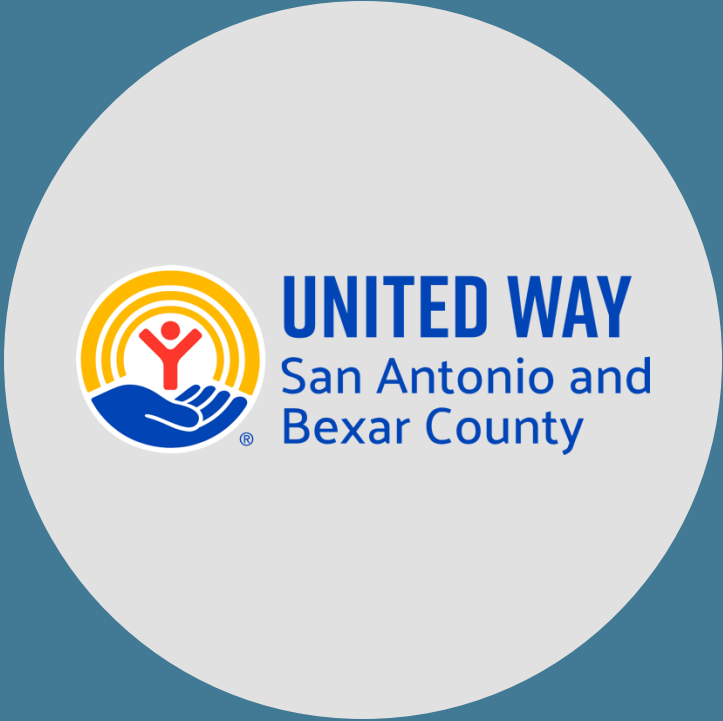
Add New Premium

Premium Name

Actions

You can participate in a 2 or 3 year step-up to donate at the Tocqueville level. Please indicate if you wish for us to contact you regarding this.

Edit | Delete



POSITIVE REINFORCEMENT

ArtsWave Donor Benefits

Cincinnati Sports Package

- Criteria:
- Your donation amount must be at least \$100
- Donor Benefit:
- Two tickets to the Reds and a special experience with FC Cincinnati!

☐ I would like to receive this donor benefit

ArtsWave Pass + Exclusive Content

- Criteria:
- Your donation amount must be at least \$100
- Donor Benefit:
- Enjoy the expanded ArtsWave Pass for a full year! The Pass includes 100s of half-price, free and last-minute passes to our region's arts, plus discounts to dining, retail and more. Discover on the ArtsWave App!

☐ I would like to receive this donor benefit

Cincinnati Music Hall Package

- Criteria:
- Your donation amount must be at least \$250
- Donor Benefit:
- A voucher for two tickets to a performance of your choice at Cincinnati Ballet, Cincinnati Opera, Cincinnati Symphony Orchestra or Cincinnati Pops or May Festival.

☐ I would like to receive this donor benefit



Manage Workflow Definitions

Actions: Sort by: Show:

<input type="checkbox"/>	Name	
<input type="checkbox"/>	Contribution Email	Properties Edit Delete
<input type="checkbox"/>	Email Incomplete Contribution Contacts Today	Properties Edit Delete
<input type="checkbox"/>	Incentive Affinity Mapper	Properties Edit Delete

Show: Showing items 1 - 3 of 3

TOOLS TO USE

INCENTIVE PROGRAM TEMPLATES

- Healthy competition
- Recognition for “regular” donors

INCENTIVE WIDGET

- Visual component of the Incentive Program Templates

WORKFLOWS

- Use a workflow to trigger a community group election
- Premium Code = Community Group Name

LAYER RULES

- Where do you want to display the widget?



HIDDEN GEMS

OneTime Passcode

Users can easily log-in to their Identity using the OneTime Passcode to verify their email or avoid resetting a password.

RIP 8080

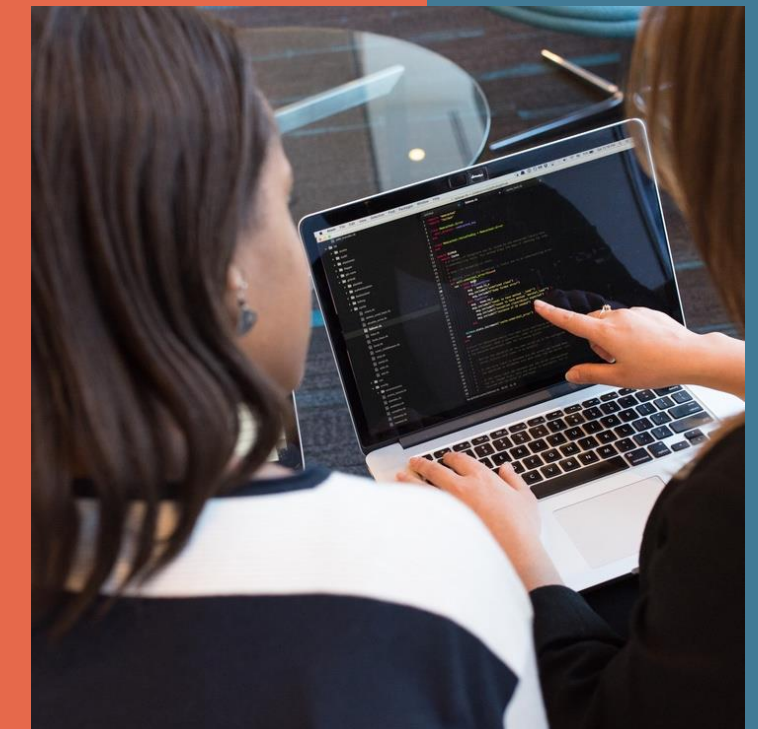
We said farewell to the 8080, also known as Workplace Site Manager, on April 13, 2025.

Charity Export

Easy extract of your Site Charities allows you to quickly pull the existing records and make updates with the new Portal Site import feature.

Portal Imports

Now you can import Charities and Contributions in your Portal Site admin experience. These are easier to access and have improved validations to make the process easier.





ON THE HORIZON

COMING SOON

- Admin Dashboard Update
- United Way Worldwide Branding
 - CSS Adjustments

WORKING TOWARDS

- Administrator Efficiency Improvements
- More Resources around Donor History
- New Theme

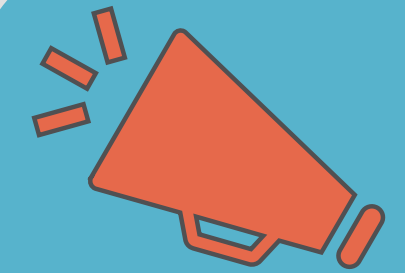
ANNOUNCING MANAGED CSR SERVICES

WHAT WE KNOW

- Significant administrator turnover
- Silo'd knowledge
- Untrained resources

HOW WE CAN HELP

- Let us drive
- Ongoing, scheduled, expert managed services
- Application optimization
- Subscription model – no hourly billing





THANK YOU
FOR YOUR TIME!

