**SOS Submission: Milwaukee SOS Submission Form  
SOS Title: Successful Partnership with United Way**

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| **Submission Date: 9/28/2016** **Chapter Name: Southeast WI ATD**  **Chapter ID: 5022** **Chapter Location: Milwaukee, WI** **Chapter Membership Size: 225** | **Contact for this Submission: Shari Saeger** **Email Address: sharisaeger@wi.rr.com** **Phone Number: 262-957-7838**  **Chapter Title: VP of Community Relations** **Chapter Website URL: http://sewi-astd.org/** |

*When responding to each area, please provide information about who, what, when, how, why, where, and to what degree where appropriate. Also, please be specific and provide enough detail that would allow a leader from a different chapter to pick up this document and mimic your effort.*

**Description of Effort:**

**Summary:**

Our chapter has successfully partnered with United Way of Milwaukee for the past 5 years, providing volunteer opportunities, as well as facilitation, training and coaching development opportunities to dozens of ATD members. Additionally, we are providing communications and presentation skills development to hundreds of area professionals over the past 5 years. It is our chapter’s largest and most successful annual partnership program.

**Need(s) addressed (please be specific):**

* Volunteer opportunities made available to ATD members that increase engagement of members and lead to membership renewal
* Performance Development of ATD Members – Facilitation, Training and Coaching, Leadership Development of possible new board members
* Presentation and Storytelling Skill Development of community professionals

**What is your chapter’s mission?**

SEWI Vision Statement: Create a skilled and competitive Southeastern Wisconsin workforce.

SEWI Mission Statement: Partner with individuals and organizations we serve to develop highly skilled and talented professionals.

**How does this effort align with your chapter mission (Please provide specific examples)?**

Our United Way partnership in the community provides ATD Members with a variety of opportunities to share their talents with others in the community and hone their skills as facilitators and coaches. It also extends professional development around presentation and communication skills to a wide variety of professionals in the local community.

Two Examples:

**I. Example** – United Way of Milwaukee and Waukesha Counties conducts multiple sessions in May and June each year to bring in the United Way Speakers Bureau participants to practice their stories and speeches. The Speakers Bureau is made up of employees from all of the different nonprofits that receive United Way funds. These speakers go out in the community to talk on behalf of United Way to try to appeal to employees of all different companies and ask for their monetary support during the big giving campaign every year. For the pasted 5 years, members of ATD have gotten involved in many different ways to support this effort. Julie, our United Way Chair provided instructional design support for the storytelling PowerPoint presentation used for training at each session. She also coordinated all of the volunteers and acted as ATD liaison to United Way to ensure proper support was given at each session. Our marketing team helped out with email advertisements to get the word out to our members that volunteers were needed. We reached out to individuals on the side as well to ask for their help. In all, we had a dozen people get involved in facilitating the storytelling training and additional volunteers at each session to help coach the speakers as they practiced their stories and presentations in small breakout sessions. One of our coaches also developed a coaching feedback form for use at these coaching sessions.

The schedule was used to manage our volunteers and also used on our website to advertise the need for volunteers for this effort. This schedule was created by our United Way Chair to manage our volunteers. It resides on our local website and allows ATD members to sign up online real time.

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|  | United Way, Milwaukee Office | 225 W. Vine St., Milwaukee 53212 |  |  |
|  | ATD Coach 1 | ATD Coach 2 | ATD Facilitator | Extra Coach |
| Tuesday, May 17, 9:00AM – 11:00AM | Rose Meagher | Mary Kay Wagner | Rose Meagher | Julie Stelter |
| Tuesday, June 7, 1:00PM – 3:00PM | Kristin Strunk | Kari Mitchell | Mary Kay Wagner | Mary Kay Wagner |
| Monday, June 13, 9:00AM – 11:00AM | Mary Kay Wagner | Kari Mitchell | Shari Saeger | Shari Saeger |
| Monday, June 27, 1:00PM – 3:00PM | Kristin Strunk | Marilyn Zwissler | Andy Marris | Andy Marris |
|  | United Way, Waukesha Office | 1717 Paramount Dr, Waukesha 53186 |  |  |
|  | ATD Coach 1 | ATD Coach 2 | ATD Facilitator | Extra Coach |
| Tuesday, May 24, 9:00AM – 11:00AM | Julie Stelter | Laura Chartier | Sue Volkman | Sue Volkman |
| Tuesday, June 14, 1:00PM – 3:00PM |  | Laura Chartier | Dana Peters | Dana Peters |

Success Story #1: A written testimonial was provided by Lisa and Rachel, the coordinators of the Speakers Bureau training at United Way.

*Julie & Shari, Thank you so much for leading the 2016 United Way Speaker’s Bureau effort on behalf of the Association for Talent Development.  It was a pleasure to work with you and your colleagues!  If you could pass this message along to all who helped, we would be very grateful:*

*On behalf of United Way, thank you to all at Association for Talent Development for joining us for our 2016 Speaker’s Bureau.  We are very grateful for your time and leadership to help train our agency speakers to speak on behalf of United Way.  Our speakers have a great task, to go into the community and help them learn about United Way, their agency, and how together we can truly move the needle and make much needed positive change in our community.  Moving people to action is not an easy task, and we welcome your help in training our partners to bring to life all of the ways in which each of us can not only make an impact, but that also move us the most.*

*Thank you for helping to incorporate and bring to the forefront our message of the importance of our Community Fund.  No one agency can fix the problems affecting our community.  Only together can we can partner with the community to find where those funds are best needed, and manage them with impact, efficiency and effectiveness.*

*I recently saw this quote on a United Way website – so well said, “United Way fights for the health, education and financial stability of every person in every community. As the leaders of the movement, we live united against the biggest challenges our world faces. It's a big fight. But when we're all in together to win it, millions of people's lives are changed.”*

*With Warmest Regards and Much Thanks,*

*Lisa & Rachel*

**II. Example:** New this year, ATD provided additional support to United Way, further strengthening our support and relationship in the community with United Way. United Way does an intensive one week training program to their Loaned Executives in early August. These loaned executives are the sales engine that manages the giving campaign at organizations all over Milwaukee and Waukesha counties and they also go out and speak during the annual giving campaign. On August 5th, we had another member of our local chapter provide a half day intensive training session to this group of sales professionals, working with them to develop their presentation and storytelling skills.

Success Story #2: A written testimonial was provided by Jeriah Ebling, our contact at United Way who manages the Loaned Executive program:

* *ATD provided LEs with some incredible tools and resources on how to effectively construct a presentation.*
* *Matt Meuleners from Focus Training did a great job facilitating the training – it was a 3 hour training (pro-bono)*
* *We received great feedback from all LEs – the training instilled confidence and provided great tips to Loaned Executives*
* *This was a high-quality executive level training that United Way staff could not have coordinated on their own as they are not professionally trained in this area (nor are we professional trainers!) *
* *Loaned Executives gave their 5 minute presentations on Monday and they are some of the best presentations I have heard!*

*United Way is so grateful to have ATD’s support. You provided an opportunity for professional development that we could not otherwise provide – both to temporary staff and full-time staff members. Sincerely, we appreciate your commitment to your community and generosity in providing this experience pro-bono – not to mention your support during our Speakers Bureau Training!*

**\*ATD Mission:** **Empower professionals to develop talent in the workplace.\***

**How does this effort align with ATD's mission (Please provide specific examples)?**

Our United Way partnership in the community provides ATD Members with a variety of opportunities to share their talents with others in the community and hone their skills as facilitators and coaches. See the examples I shared in the first section.

**Target Audience (Who will benefit/has benefited?):**

1. Over 25 members of ATD members have participated in this program over the past 5 years. In 2016, 13 ATD members in our local chapter gave their time and talents to the program. These ATD members are able to give back as well as hone their own training, facilitation and coaching skills.
2. Each year, over 100 nonprofit speakers have been able to develop better speaking and storytelling skills so they are more effective at delivering a message and asking for donations during the United Way giving campaign. United Way donations go directly to the support of local programs at the nonprofits in our area.
3. In 2016, United Way hired 24 Loaned Executives to work with area businesses to set up United Way campaigns. These are area business professionals that are loaned to United Way each year and they go out in the community to promote United Way’s giving campaign each year. A brand new development opportunity this year for us. We provided a 3 hour training program to the group of 24 loaned executives. They benefited from learning how to give a more dynamic and professional speech during United Way’s giving campaign as well and built confidence through practice during the workshop. We are expecting to continue this program in the years to come because of the success of the program in 2016.
4. United Way benefits by being able to provide quality training at no charge to these two groups of people in order to support the achievement of their fundraising goals each year.

**Costs/Resource Used:** *(Include any details regarding use of resources including monetary, donations, contributions, volunteer hours, people resources, etc. and how you went about getting these resources.)*

**How did you implement?** *(Please give a brief description.)*

In March, our Community Relations VP and United Way Chair sat down with members of United Way to understand the needs and identify the type and number of volunteers needed for supporting United Way in 2016. Two opportunities came out of that discussion.

Implementation Plan for Opportunity #1:

1. The first initiative was our annual support of the UW Speakers Bureau. We had supported this program for the past 4 years. Workshop dates for the UW Speakers Bureau were determined and our United Way Chair developed a schedule based on the event dates and times we agreed to with United Way. These workshops take place at 2 locations at various times in the months of May and June each year.
2. ATD United Way Chair posted the calendar and open dates on our website and our marketing team sent a number of email marketing requests out as we searched for volunteers for the various roles and event dates.
3. ATD members could click on the link or reach it from our local website and easily sign up online for the event since we attached the schedule via a live google worksheet so sign up happened in real time.
4. United Way supplied us with a draft of the PowerPoint presentation and our United Way Chair provided instructional design content PowerPoint related to the Presentation and Story Telling Tips that our facilitators would address in the workshop.
5. ATD also supplied facilitation and coaching instructions to ATD volunteers.
6. United Way Coach set up multiple Facilitator and Coach Expectation Sessions ahead of the workshops so all volunteers could understand their role before attending and participating in the workshops.
7. One of coaches also provided a coaching worksheet as a tool to capture notes during each skill practice.

Implementation Plan for Opportunity #2:

1. The second opportunity that surfaced during this meeting was an opportunity to provide more intense presentation training and development to a group of 24 at United Way called Loaned Executives. The 24 Loaned Executives were hired as temporary workers and would be providing sales and support to area organizations during the 4 month campaign. UW gave us the date in August for this training so we needed to pursue a trainer that could also make that date. We decided not to commit to this opportunity until we could see if we had a resource that would be interested in conducting this training. We told UW we would get back to them in June with an answer.
2. The VP Community Relations created a short list of possible members who would be able to provide this level of training. We then reached out to possible members within ATD that had the background and experience to do presentation skills training. From those reach outs, we identified a member that had not yet done any sort of volunteer work for ATD. Matthew was very excited to take part in the training and just happened to have that date available on his schedule. He travels extensively for his job, so we were thrilled that this worked for him.
3. In early July, one month before the training date, the VP Community Relations and Matthew, our trainer met with the UW Loaned Executive Program Manager to better understand needs. We decided on a half day program that Matthew would develop for them. Training program would be August 5th, the first week the Loaned Executives were on staff and going through initial onboarding and training.
4. Program was delivered. VP Community Relations also attended the training and afterwards, went to lunch with the UW Staff and did a quick debrief on the morning’s session. Initial reaction from everyone was extremely positive.
5. Participants provided evaluations to United Way and UW Program Manager followed up with a thank you and testimonial based on the success of the speeches that were delivered the following day as skill practice and the high scores on the evaluations from the participants.

**What were the Outcomes?** *(Please include hard data regarding financial, membership increases, target audience satisfaction levels, publicity for the chapter or for the profession, etc.)*

1. *We were provided with two testimonials from United Way (see above) demonstrating their delight based on the high satisfaction scores of the participants. Also, being asked to provide support for a second event this year further demonstrates the value we are providing to them. The two testimonials will be used for marketing and branding purposes in the future to recruit volunteers and help other potential partners learn more about our chapter and how SEWI-ATD can provide help in the community.*
2. *Make it easy to recruit new volunteers: SEWI-ATD held our annual volunteer event in August this year honoring our volunteers across all initiatives within our chapter. Our Chapter President, Dana Peters spoke briefly at the event and highlighted our work with United Way and the need for volunteers at this event each year. After hearing Dana speak, I had two ATD members come up to me at the event and tell me they want to get involved next year.*
3. *8 out of 13 volunteers were new to supporting our United Way events this year. 5 returned from last year.*
4. *New this year – VP Community Relations created the United Way Chair position and wrote a job description this year under the Community Relations Team in order to provide a dedicated resource and one stop shop for United Way to work effectively with us. During the two months of workshops, it can get hectic and we knew a dedicated resource could be a solution. VP Community Relations recruited Julie to step into the position:*

*Results:*

* *Seamless support – ATD had every timeslot filled with a volunteer prior to each event*
* *All volunteers understood expectations prior to event*
* *Julie, the United Way Chair re-upped her commitment and communicated that she will be the United Way Chair again next year!*

**Lessons Learned:** *(Hints and tips for other Chapters who may be considering a similar effort)*

1. *Create a chair position to support large focused efforts of this nature, especially helpful for large, recurring annual events.*
2. *Nonprofits are a great fit for our services to the community.*
3. *Leverage the relationship by getting testimonials that can provide your chapter with marketing and branding ideas.*
4. *Make volunteering easy through a simple sign up procedure.*

**Please list the specific ATD chapter resources that helped guide you in the process of completing this best practice (e.g. people, documents, policies, by-laws, etc.):**

**How did you become familiar with the Sharing Our Success (SOS) program?**

* Saw or heard of SOS from Twitter
* Saw or heard of SOS from Facebook
* Saw or heard of SOS from another Chapter Leader
* Saw or heard of SOS from LinkedIn Chapter Leaders group
* Saw or heard of SOS on an area call with a NAC representative
* Found SOS on ATD website
* Other

**Would you be willing to present on this submission at the ATD Chapter Leaders Conference (ALC)?**

**\*Participating chapters receive up to two complimentary registrations for presenters.**

Yes!

***Please email completed forms to*** [***SOS@td.org***](mailto:SOS@astd.org) ***along with any supporting documents.***