



Summit Credit Union At-A-Glance:

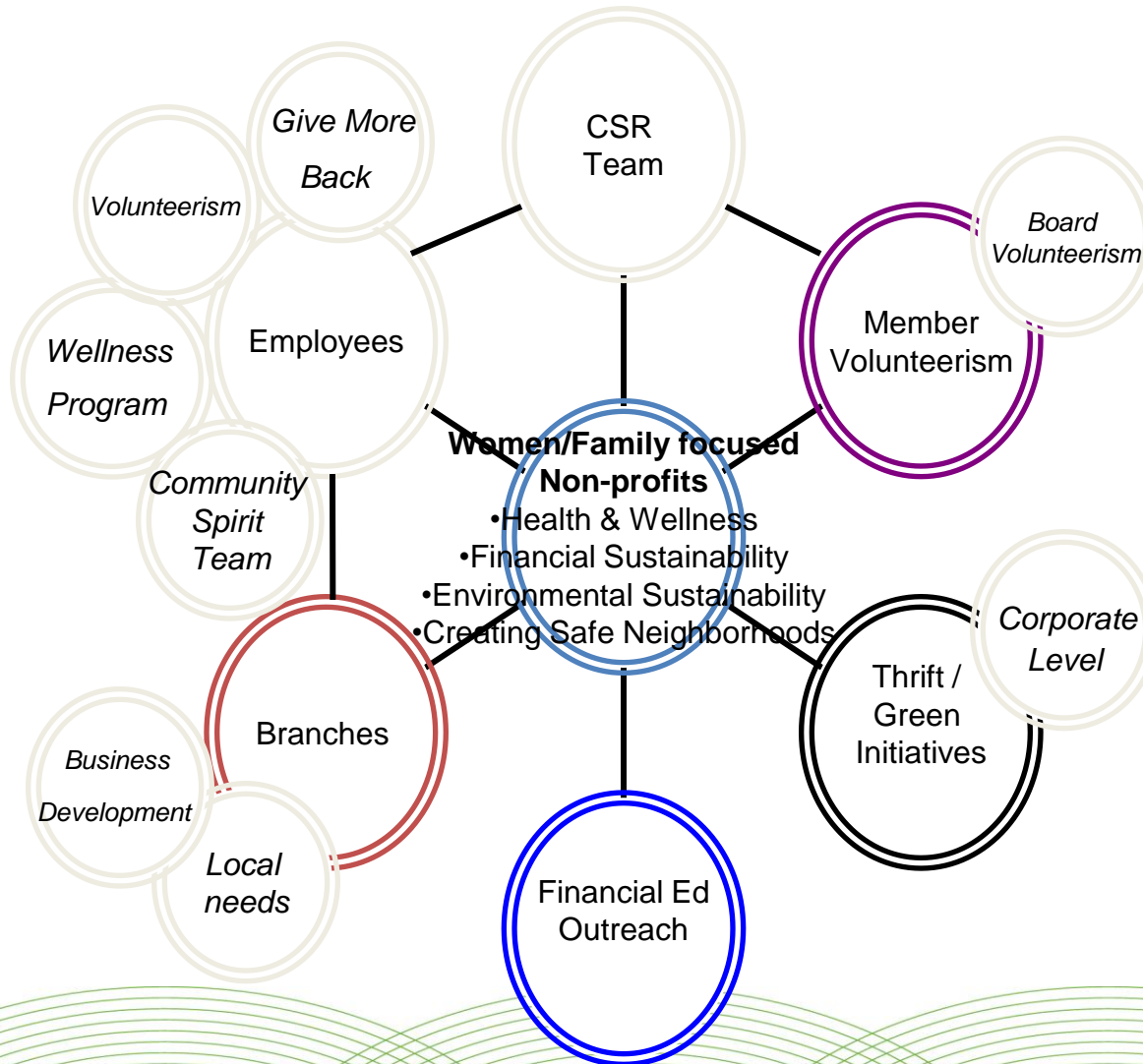
- * 75 year old full-service financial institution
 - * Not-for-profit cooperative

- * 23 branches in 8 Wisconsin counties
 - * \$1.6 billion in assets
 - * 118,946 members
 - * 375 employees

What?

- Corporate Social Responsibility Plan
 - Written document with areas of focus
 - Employee Volunteer Activity Policy
 - Branch–level allowance
 - CSR Team / Charitable Giving Budget
 - Community Spirit Team
 - Self-branded giving campaign (“*Give More Back*”) which includes Community Shares of WI.

Summit's Corporate Social Responsibility



Do more. Start here.

SCU/UWDC Partnership At-A-Glance:

- 1989
- Corporate Gifts (\$260,000)
 - Majority are unrestricted gifts to advance the Agenda for Change
 - Women's Initiative and Dane County Youth Resource Center Initiative
- Employee workplace campaigns & Special Events (\$356,000)
- Volunteers
 - Teams: Marketing Committee, Vision Council, Housing in Action Team, Cabinet Members, Community Solution Team, FLE Committee, Diversity & Inclusiveness Coordinating Committee, Volunteer Consultant, Business Volunteer Network
 - Days of Caring
 - Loaned Executives
 - Account Executives



Special Special Events!

Days of Caring = Team building!



Do more. Start here.

How?

- Time & Patience
- Learn all you can about current and potential companies
 - Company websites, press releases, publications, networking, employee make up
- Find the connection. Ask questions of companies ie) page 2 and then be able to identify and communicate how you can partner.

How? (continued)

- Communication
 - What are you as a UW doing and why?
 - Progress made on agenda goals including stories/tangible/measurable results
 - Impact of Your Investment
 - Year-Round communication
 - Forwarding messages from campaign director with custom intro
 - Donor Engagement Sessions

How? (continued)

Donor Engagement Sessions

1. One Month in Poverty Simulation

- The goal was to provide employees with an interactive and engaging experience to help illustrate the community issue of living in financial crisis while also communicating the work the United Way does as well as the work Summit does.



Volunteers lined the room serving as different community members.

Employees were grouped into families and given identities and situations to react to.



Do more. Start here.

How? (continued)

Donor Engagement Sessions

2. Presentation by partner agency that tied with a CSR focus
 - Included guest speaker with story
 - Housing Case Studies
 - Several employees later became involved as volunteers with the agency

You may be asking yourself:

- Are all companies like this?
- Will my partnerships look just like this?
- Is this the future of donor engagement?
- You mean I can work on building the relationship outside of the annual campaign?

Listen. React. Collaborate. You can do it!

Questions?

Share
Top
Take-Aways

