

U N I T E D   W A Y   O F   F L O R I D A



THE TWENTY-THIRD ANNUAL STATEWIDE LEADERS CONFERENCE

TUESDAY | JUNE 20, 2023 | DAY 1

**A CEO Conversation with United Way of Florida Leadership** (For CEOs only): CEOs, as a small group, will enjoy talking with Alexia Savage, Vice President of Network Engagement, for UWW updates. Lexi's insightful relationship with Florida's network will make a perfect start to our Conference. Additionally, Winston Faircloth, CEO of For the Love of Team (and UW alum) has been engaged to create an organizational baseline and assist in setting a vision for UWOFF. Finally, although it remains to be confirmed, our time may include a Publix Leadership component.

WEDNESDAY | JUNE 21, 2023 | DAY 2

## **Breakout Session 1**

**Let's Talk About it - How to be a Part of Community Conversations That Weave Us Closer Together:** There is tremendous impact when we join together with community partners for important conversations. This knowledge sharing session will explore ways to engage with our communities in bold conversations and draw on current resources to bolster impact. Learn to leverage existing conversations to further support our impact.

**Social Media Myth Busting: Using Data to Drive Content Strategy:** We won't let algorithms rain on our social media parade! In this session, we will discuss ways to work around limitations to meet our social media engagement goals, outside of paid ads. Hear expert advice and techniques to increase reach, engagement, followers, and build community on Facebook, Instagram, and LinkedIn.

**Don't Let Your Strategic Plan Collect Dust... Keep it Moving!:** Strategic planning is a best practice, so let's have some fun doing it! This engaging session will showcase how to activate a strategic plan that incorporates employee performance goals - effective and efficient! This living document is a multi-year, roll-forward plan that adjusts to meet the current needs of the organization. Bonus: Everyone will receive several virtual references for future use.

**The DNA of Diversification | Innovation in Affinity:** Diversifying our donors is as complex as DNA itself. How we approach affinity is key to the engagement of long-term donors and committed volunteers. This panel is a mix of volunteer leaders and United Way staff who have innovated their affinity programs with a focus on DEI.

## **Breakout Session 2**

**Intertwining Innovation into Investment - Collaborative Exchanges About the Impact Grant Process:** There are many ways to distribute grant funds into our community. These synchronous conversations will help spur creativity in our investment processes. We will consider unique ways to set up grants, engage volunteers in the process, and report on outcomes and impact.

U N I T E D   W A Y   O F   F L O R I D A



THE TWENTY-THIRD ANNUAL STATEWIDE LEADERS CONFERENCE

**The Art & Science of Storytelling: Communications to Drive Action:** Storytelling has the power to educate, influence, engage and inspire readers to action. In this session, we will hear from world-class storytellers on how they artfully craft stories to bring brands to life and the science behind driving consumers to action.

**Who Wants More Unrestricted Revenue?:** Find the hidden tools in Finance and Operations to add to our toolbox! We will learn some creative ways to diversify and increase our organization's revenue by looking at a variety of internal tactics: stop chasing after grants just to create a new program, charge a fee for services, and other innovative ways to increase unrestricted revenue outside of fundraising.

**The DNA of Donor Desires | Benchmarking Methods to Track Donor and Community Interests:** In 2021, United Way Worldwide released the results of our global brand study. Results documented United Way as a national brand against similar-sized nonprofit leaders. While the results on the surface may have indicated certain assumptions, it did not allow for the power of the brand in our local communities. This panel will share the results of brand studies, benchmarking surveys, focus groups and other metrics used to determine local United Ways' market share, drivers for engagement and how at each United Way we can build scalable methods to track donor sentiment and regional awareness.

## Plenary Sessions

**The Power of Philanthropy, An ALICE Conversation | Gregory Haile, President of Broward College:** To open our Conference, this motivational keynote speaker focuses a microscope on how the work we do opens doors for the most vulnerable in our respective communities and how this demonstrates the power of philanthropy. Walk away from this session challenged to dive deeper into the Conference theme of 23 & We, where we will lean into one of our network's biggest strengths - capitalizing on the intersect between the **We** in our communities and the **We** in our network.

**Uniting Around a Clear Story: A Framework for Growth | Jay Owen, Business Builders:** In both business and nonprofit marketing, we have often heard, and more likely experienced, the benefits of storytelling. During this plenary, Jay Owen, "Chief visionary" of his company Business Builders, will share insights on how to eclipse other marketing by drawing your audience into your stories. With over 20 years experience in marketing, Jay is an engaging and sought-after speaker with a passion and personal connection to the work of United Way.

**Disaster Preparedness & Recovery | A Moderated Panel:** Disasters require planning for the unexpected which is no easy task. Our second day ends with an expert panel in disaster preparedness, recovery, and relief, diving into both natural and man-made disasters. Get key takeaways on planning and how to pivot when needed.

U N I T E D   W A Y   O F   F L O R I D A



THE TWENTY-THIRD ANNUAL STATEWIDE LEADERS CONFERENCE

THURSDAY | JUNE 22, 2023 | DAY 3

### Breakout Session 3

**Working Together in Times of Crisis - Interactive Discussions on Disaster Funds Impact:** In times of disaster, funders turn to United Ways to distribute disaster related funds quickly and ensure the biggest impact to our communities. Table topic discussions around disaster response and recovery will focus on innovative fund distribution processes, effective ways to complete reporting requirements and ensuring impact to our communities.

**Media Relations: How to Partner with Media for Win-Win-Win Relationships:** Nonprofits don't often have the luxury of an advertising budget to broadly share their message. In this session, we will hear straight from media representatives on how to effectively partner with their outlets for editorial and in-kind media placements, as well as examples from local United Ways who have done this effectively.

**Etiquette 2.0: Communication in a Hybrid/Remote Work Environment:** In a post-pandemic environment when many workplaces remain remote or hybrid, it can be challenging to communicate effectively and build strong working relationships amongst colleagues and teams. We will learn ways to make our communication more effective, impactful and engaging.

**The DNA of Disaster | Fundraising through Disaster:** As we look to the recent devastation of Hurricanes Michael & Ian and the mass shootings at Pulse Nightclub & Marjory Stoneman Douglas High School, we know as United Ways in Florida that fundraising in a disaster is not a question of *if*, but *when*. This panel of fundraisers has lived the worst-case scenario and will share lessons learned, best practices, and provide insight on how to prepare our fundraising strategy when disaster strikes.

### Breakout Session 4

**Making ALICE a Part of Your DNA – A Conversation on Integrating ALICE into Everything We Do:** ALICE data is truly impactful, but how can we incorporate ALICE into more of what we do? Hear from a panel about how the data is being put into action in transformative ways including advocacy conversations and decision making.

**Experiential Marketing: Creating “Aha!” Moments through Meaningful Brand Experiences:** The majority of people are aware of United Way, but understanding of how we create impact falls flat. In this session, local United Ways will share experiential marketing products that create hands-on “mission moments” for donors and volunteers designed to increase understanding and drive empathy.

U N I T E D   W A Y   O F   F L O R I D A



THE TWENTY-THIRD ANNUAL STATEWIDE LEADERS CONFERENCE

**The Ever-Changing Workforce:** In a workforce that represents over five generations and a number of diverse perspectives based on background, experience and culture, the work environment is in a place of constant evolution. How should we institute policies and educate on best practices to support an environment of inclusion for the employee while maintaining the needs of the organization? Join this session to hear from a panel of United Way representatives making this a top priority.

**The DNA of CRM | Automating Teamwork: Finding a CRM that Works for You:** Our work has changed dramatically since March 2020. In response, we've turned to tech to help. Over time we've added more stand-alone tools, ultimately creating more data silos within our organization, not to mention, multiple logins for donors to navigate to give or volunteer. Ultimately, technology needs to work for us, not the other way around. This begins with our team being clear about the processes, journeys, reporting, and workflows needed to automate internal teamwork, so that our CRM platform supports true relationship building. In this session, we will share our Playbook of recent LUW experiences with aligning technology to mission, by focusing on the inner work required to have technology work for us.

## **Plenary Session**

**A Conversation with Publix CEO Todd Jones:** Todd Jones, CEO of Publix Super Markets, known for energy and vision, is dedicated to cultivating a climate in every store where each associate understands how they contribute to the company's success, and are both inspired and engaged not only with the company, but also the community they serve. At United Way, we as a network understand the value of this leadership and partnership. No one will want to miss this session. Our Conference closes with the incredible opportunity to learn more about the history and unique culture of United Way's leading corporate sponsor.

FRIDAY | JUNE 23, 2023 | DAY 4

**United Way of Florida Board of Governors Meeting**