



Metro United Way

metrounitedway.org

2018 Ambassador Training Toolkit

GIVE. ADVOCATE. VOLUNTEER.
LIVE UNITED

Our mission is to improve lives and our community by engaging people to give, advocate and volunteer.

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Metro United Way Ambassador – Job Description

The Metro United Way Ambassador role is a high-profile volunteer opportunity for leaders in the community. The role of an Ambassador is to raise awareness of the incredible impact Metro United Way is having in our community and to invite current and potential donors to invest in the work.

Ambassadors represent Metro United Way at strategic speaking engagement opportunities, information fairs, and other community events. Ambassadors will work with Metro United Way staff to organize speaking engagement logistics and content. All Ambassadors will be asked to complete an online Ambassador Training in late August of 2018.

Responsibilities

- Effectively communicate Metro United Way's vision and mission.
- Be able to answer general questions about Metro United Way should MUW staff not be present. (For answers to FAQs, visit metrounitedway.org/faq)
- Effectively communicate how your involvement in the community directly aligns to the work of Metro United Way.
- Accompany Metro United Way staff on Leadership, Executive level, and/or Employee presentations.
- Inspire the audience to invest in Metro United Way by sharing compelling stories that elevate the impact and relevance of our work.
- Invite others to join you in support of Metro United Way.
- Thank current and potential donors for their time, consideration and commitment to community.
- Complete an online Metro United Way Ambassador Training
- Complete a brief survey at the end of Ambassador Training

Areas of Impact

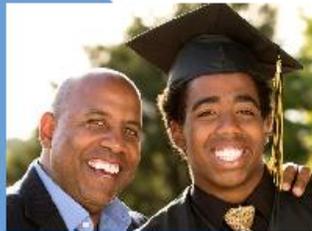


GOAL: Create the opportunity for all people to achieve their full potential



Early Childhood Success

Children enter school ready for success



Youth Success

Youth gain the knowledge, skills, and belief needed to graduate college and career ready



Financial Independence

Individuals/families improve their socio-economic status and can provide for themselves



Healthy Lives

Individual's/families' basic needs are met and they achieve better health outcomes

How We Work



Mobilize Resources

Financial Resources
Volunteers
Community



Build Stronger Communities

Direct Services and Supports
(Funding and technical assistance to partners who provide services and supports to individuals and families)

Systems Improvement
(Increased community capacity via training, best-practice sharing, policy change, leading collective impact, convening, partnerships)



Change Lives

Improved Early Childhood Success
School readiness

Improved Youth Success
Graduate school college/career ready

Improved Financial Independence
Strengthen financial stability
Attain jobs

Improved Health
Meet Basic Needs
Access to Healthcare Services

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How to Use the Elevator Pitch

Metro United Way brings together people and resources to tackle our community's most significant challenges. This is important because no one person or organization can fight these issues alone but together we can create lasting change. When everyone has a quality education, good health and the financial security to be able to support themselves, individuals thrive and our community thrives. At Metro United Way, we impact the most people, in the most ways, for the most good in our community. We need you to give, raise your voice and volunteer your time because your involvement is our most powerful resource.

- 1) **Remember it's a living document.** This pitch will change and grow.

- 2) **Stick to the core messages, but don't feel you have to recite it.** Often you will use the elevator pitch in informal situations where you'll need to put it in your own words. Allow for interruptions and questions and feedback. This is a conversation! The main points you absolutely need to hit are "the why," "the what," the "what's more" and the "who?"
 - **The Why**

Metro United Way brings together people and resources to tackle our community's most significant challenges and improve lives. No one individual or organization can fight these issues alone but together we can make lasting change.
 - **The What**

When everyone has a quality education, good health and the financial security to be able to support themselves, individuals thrive and our community thrives.
 - **The What's More**
 - At Metro United Way, we impact the most people, in the most ways, for the most good in our community.
 - **The Who**

You! We need you to give, advocate and volunteer because our most powerful resource is your involvement.

- 3) **Customize this pitch by emphasizing the points that are most important to your audience.** Sample messages can be found on pages 11-14 of this toolkit.

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Developing YOUR United Way Story

Storytelling is one of the best ways to share your personal connection to the mission and vision of Metro United Way. Meaningful stories – about individuals and families who receive vital services through Metro United Way and our partner agencies, and volunteers who improve our community by sharing time and talents – are key ways to illustrate to your audience what it means to Live United.

As an Ambassador on the campaign trail, you can help show the reach and relevance of Metro United Way by highlighting an individual (or individuals) who benefited from our work. Or, you can share your own personal experiences as a MUW donor, advocate or volunteer.

What makes a good MUW story? Your story does not have to be long or complex. A good story is emotional, simple, concrete, and credible. Start with the end in mind and work backwards.

- What shift do you want to see in your audience?
- What three points do you want them to remember?
- What action do you want them to take after they hear your story?

The best stories are told by people who are excited and knowledgeable about the subject matter – people just like you!

Let's get started in crafting your story... Think of a time when you or someone you know made a difference in another person's life.

Who are you? What is your role in the story? Introduce yourself.

Who is the main character in your story? Who else was involved?

What happened (The beginning, middle and end...)? What challenges arose along the way? What changed by the end of the story?

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What is Metro United Way's role in the story?

How does your story relate to Metro United Way's priorities and supporting strategies?

Why does this story matter? To those involved? To our community? To you?

Outline your hero's path. Once you've got the answers to the questions above, you are ready to outline your story. Imagine that the main character is your hero. Along their path, your hero encounters a conflict AND navigates challenges with the support of Metro United Way. Eventually, your main character reaches a finish line – success! The hero is transformed, fulfills a need or reaches a milestone. You've just shown how critical MUW is as a catalyst for change.

Practice, practice, practice! Start out by practicing your story. Share your story with a friend or family member. The more you practice, the easier telling your story can be!

And remember: the most important thing we can say when we're speaking about Metro United Way is THANK YOU! It takes all of us working together to create lasting change in our community. We can't do it alone. So, once you've shared your story, be sure to share your gratitude. This is what it means to LIVE UNITED!

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Making the Ask



Once you've informed your audience about Metro United Way and shared your passion for the work, making the ask is easy. You are the connector – your job is facilitating the donors' ability to impact a community issue that they find compelling. Some asking examples include:

“I hope you’ll join me in improving lives in our community and empowering people to achieve their full potential by making a pledge to Metro United Way today.”

“Please consider a gift of any amount that you’re comfortable with – every dollar counts!”

“Your gift to Metro United Way strengthens our community by creating opportunities for every person to thrive through a better education, stronger financial independence, and healthier lives.”

“If you have given in the past, I would ask you today to please continue your support. If you are thinking about giving for the first time, **I hope that you’ve heard something today that inspired you.** Every dollar counts!”



HOT TIPS

-  Remember that your audience knows that you are there to ask them to participate!
-  Most of the places you are speaking have invited Metro United Way to be there because they care about our work and our community!
-  Don't take it personally! You're not asking them to give you money...you're asking on behalf of the kids and families we serve.
-  If they have questions that you don't know how to answer, ask if you can find out and contact them after the meeting.
-  Practice, practice, PRACTICE! Out loud, in the mirror, with a co-worker, with a friend. We don't care how...just do it!

We get it – asking for money is intimidating. But it's also an immense privilege. You're inviting other people to take action for a cause that they genuinely care about. You are making them a partner in our critical work. And at the end of the day, people like to know they can make a difference in the world. *You just have to ask them!*

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Presentation Outline

THANK – INFORM – ASK – THANK

One thing that ALL Metro United Way campaign presentations have in common is the THANK – INFORM – ASK – THANK outline. This is an easy outline to remember when you are preparing to go on the campaign trail. The outline also helps assign different roles when you are presenting with a partner. In general, there are two types of campaign meetings: Solo and Combo.

SOLO Meeting – A solo meeting is one where the Ambassador is the only Metro United Way representative on the presentation agenda. It is your job to cover all parts of the THANK – INFORM – ASK – THANK presentation outline.

COMBO Meeting – A combo meeting is one where a Metro United Way team member and an Ambassador are both on the presentation agenda. In this case, the outline is as follows (unless determined otherwise by the presenters):

THANK – MUW

INFORM – Ambassador/MUW

ASK – MUW

THANK – BOTH

Here is a general overview of each section:

THANK – Sincerity is key. At Metro United Way, we know we can't do this alone. Make sure your audience knows that, too.

- “Thank you so much for inviting me to be here today to speak about Metro United Way. My name is name and I am the job title at organization . On behalf of everyone at Metro United Way and the individuals we serve, I would like to thank you and company name for your generous past contributions and commitment to MUW's mission. Through your support, Metro United Way is able to impact the most people, in the most ways, for the most good in our community.
 - Last year, and company name raised more than \$\$\$ through your workplace campaign.
 - Your team engaged in volunteer activity .”

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INFORM – Your job here is to educate your audience about : a) the issues and needs in our community; and b) the ways in which Metro United Way (MUW) is addressing these issues. You will determine the order of your presentation, but it should hit on several key talking points:

- Our mission & vision (page 4)
- Our priorities (page 4 and pages 11-14)
- Our programs and partnerships (visit www.metro united way.org/things-we-fight-for)
- MUW’s collective impact approach and our unique value proposition of impacting the most people, in the most ways, for the most good in our community
- Your MUW story (pages 6-7 and 11-14)

ASK – See detailed overview on p. 7.

THANK – Thank them again! Ask if they have any questions. If they have questions that you don’t know how to answer, ask if you can find out and contact them after the meeting. Tell them how they can learn more about MUW (website, social media, 2-1-1, etc.) and thank them for their time, attention and support.

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PRIORITY: Early Childhood Success

Introduction:

Hello, I am [Name] with [Agency Name]. Thank you for being here today to learn about Metro United Way and the opportunity you have to empower so many in our community through better education, stronger financial independence, and healthier lives. I'd like to speak to you today about one of the priorities that [Agency Name] is working toward with the help of Metro United Way: that children in our community enter school ready for success.

VISION: All children will enter school ready for success

Question for the group: what does a child being 'kindergarten ready' mean to you? Over 100,000 children ages six years old and younger live in the area served by Metro United Way. Recent data shows that nearly half of incoming kindergarteners are not developmentally ready to learn and experience a strong start to their education journey. We know that children who start out behind tend to stay behind. Kids that are offered rich early childhood learning opportunities have a better chance of entering kindergarten prepared, which sets them on the path for lifelong success. All kids deserve the opportunity to reach their full potential and become the next leaders in our community!

Agency Program:

So, how do we do that at [Agency Name]? With the support of Metro United Way, we [Discuss early childhood program supported by MUW and how the support you receive from MUW makes a difference. Some examples: On My Way Pre K, Excellence Academy, Ready for K Alliance. Sample message: "As part of Metro United Way's Excellence Academy, our preschool teachers receive hands-on training to strengthen their skills in the classroom. This is not something we would typically be able to afford and ensures the children in our care are getting the quality early learning they need to be successful]"

Share a Story/Make the Ask:

Before I leave, I'd like to share a story with you: [Share an uplifting story that focuses on long-term results about a child who was impacted by the early childhood program above.]

Closing:

Thank you for supporting Metro United Way and helping children like [Child's name from story above] to be successful from the start!

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PRIORITY: Youth Success

Introduction:

Hello, I am [Name] with [Agency Name] . Thank you for being here today to learn about Metro United Way and the opportunity you have to empower so many in our community through better education, stronger financial independence, and healthier lives. I'd like to speak to you today about one of the priorities that [Agency Name] is working toward with the help of Metro United Way: that youth in our community gain the knowledge, skills, and belief needed to graduate college and career ready.

VISION: Youth gain the knowledge, skills, and belief needed to graduate college & career ready

High school graduates earn more, are more engaged in their communities, and are more likely to raise kids who also graduate. Youth in our community have an 81% graduation rate, however only 59% of our local graduates are college or career-ready. Students only spend 9% of their time in school, so it's important that learning continues outside of the classroom. Youth who attend quality out of school time programs are less likely to drop out of school in comparison to their peers who don't participate. They are more likely to be college and career-ready and show better performance in measures such as attendance and engagement in learning. By investing in quality out of school time programs, we're investing in brighter prospects not just for our youth, but for our entire community in the long run.

Agency Program:

So, how do we do that at [Agency Name] ? With the support of Metro United Way, we ...[Discuss youth program supported by MUW and how the support you receive from MUW makes a difference. Some examples: BLOCS, OST, Summer of Science. Sample message: "With Metro United Way's support, more than X number of youth participated in our out of school time program last year. They benefited from mentoring, after school tutoring, etc."]

Share a Story/Make the Ask:

Before I leave, I'd like to share a story with you: [Share an uplifting story that focuses on long-term results about a child who was impacted by the youth program above.]

Closing: Thank you for supporting Metro United Way and helping children like [Child's name from story above] succeed in school!

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PRIORITY: Financial Independence

Introduction:

Hello, I am [Name] with [Agency Name]. Thank you for being here today to learn about Metro United Way and the opportunity you have to empower so many in our community through better education, stronger financial independence, and healthier lives. I'd like to speak to you today about one of the priorities that [Agency Name] is working toward with the help of Metro United Way: that individuals and families in our community improve their socio-economic status and can provide for themselves.

VISION: Individuals and families improve their socio-economic status and can provide for themselves. Families desire to be financially independent, with enough income to provide for themselves. One in seven people in our community live in poverty. One in three households in our community earn less than 200% of the poverty level, making it difficult to make ends meet month-to-month, much less save for the future and plan for the unexpected. Metro United Way invests in programs that empower people to better understand and manage their finances, to leverage valuable resources available to them such as the Earned Income Tax Credit, and to build marketable skills for better earning potential. Our vision is to create opportunities for individuals to do more than get by and begin to thrive.

Agency Program:

So, how do we do that at [Agency Name]? With the support of Metro United Way, we ... [Discuss program/service supported by MUW and how the support you receive from MUW makes a difference. "With Metro United Way's support, more than X number of individuals participated in financial literacy courses, job skills training, free tax preparation assistance, etc."]

Share a Story/Make the Ask:

Before I leave, I'd like to share a story with you: [Share an uplifting story that focuses on long-term results about an individual who benefitted from the financial independence program above.]

Closing:

Thank you for supporting Metro United Way and helping individuals like Individual's name from story above] to be successful!

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PRIORITY: Healthy Lives

Introduction:

Hello, I am [Name] with [Agency Name] . Thank you for being here today to learn about Metro United Way and the opportunity you have to empower so many in our community through better education, stronger financial independence, and healthier lives. I'd like to speak to you today about one of the priorities that [Agency Name] is working toward with the help of Metro United Way: that individuals' and families' basic needs are met and they achieve better health outcomes.

VISION: Individual's and families' basic needs are met and they achieve better health outcomes.

Good health is a cornerstone of a good quality of life, and too often in our community individuals endure the chronic stress of having to struggle for basic needs such as nourishing meals and safe, consistent housing. One in six people in our community is food insecure. About 6,000 JCPS students are reported homeless. When individuals are unable to meet their immediate needs, it is more difficult to focus on things like mental, emotional, and physical health, as well as getting back on one's feet and pursuing longer-term goals. That is why Metro United Way supports a strong network of basic needs services through community partners and the 2-1-1 "help" hotline. These services touch nearly 1 in 3 in our community every year- children, adults and seniors.

Agency Program:

So, how do we do that at [Agency Name] ? With the support of Metro United Way, we ... [Discuss program/service supported by MUW and how the support you receive from MUW makes a difference. For example: "With Metro United Way's support, we were able to provide shelter to X number of families and children. XYZ program also helps our clients secure employment and transitional housing to help them get back on their feet."

Share a Story/Make the Ask:

Before I leave, I'd like to share a story with you: [Share an uplifting story that focuses on long-term results about a person impacted by the program above.]

Closing:

Thank you for supporting Metro United Way and helping people like [Person's name from story above]!

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PRIORITY: Black Male Achievement

Introduction:

Hello, I am [Name] with [Agency Name] . Thank you for being here today to learn about Metro United Way and the opportunity you have to empower so many in our community through better education, stronger financial independence, and healthier lives. I'd like to speak to you today about one of the priorities that [Agency Name] is working toward with the help of Metro United Way: that all black men and boys in our community have access to opportunities and are valued as contributing citizens and people.

VISION: all black men and boys in our community have access to opportunities and are valued as contributing citizens and people. In Kentuckiana, research shows that race, place, and other factors contribute to different opportunities and different outcomes in relation to our work in education, financial independence and health. Metro United Way believes that black males are assets to our community and that their potential is unlimited. Eleven percent of all businesses in Jefferson County are owned by African Americans. African Americans are creating businesses at a rate that is growing at over twice the national average. Metro United Way's Black Male Achievement initiative invests in leaders, organizations, and strategies to improve the life outcomes and collective upward mobility of black men and boys in Louisville.

Agency Program:

So, how do we do that at [Agency Name] ? With the support of Metro United Way, we ... *[Discuss program/service supported by MUW and how the support you receive from MUW makes a difference. For example: "With Metro United Way's support, more than X number of African American youth participated in X program. They benefitted from mentoring, tutoring, developing leadership skills, etc.]*

Share a Story/Make the Ask:

Before I leave, I'd like to share a story with you: *[Share an uplifting story that focuses on long-term results about an individual who benefitted from the program above.]*

Closing:

Thank you for supporting Metro United Way and helping individuals like *Individual's name from story above* to be successful!

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Speaking Engagement Logistics

How will the process work?

1. Once Metro United Way receives a speaker request, the Community Giving Campaign Outreach Coordinator, Amanda Weegens, will send a mass e-mail to the Ambassador contacts with basic meeting information.
2. Ambassador contacts will reach out to the qualified Ambassadors in their agency to see if anyone is available.
3. Ambassador contacts will reply to the e-mail if they have an available Ambassador.
4. Speaking engagements will be assigned on a first-reply basis. If yours was the first reply, the following will occur:
 - a. Amanda Weegens will notify you that your Ambassador will be the speaker.
 - b. Ambassador contact will give the Ambassador's contact information (phone/ e-mail address).
 - c. Amanda Weegens will send the Ambassador's contact information to the company and will send the company's contact information to the Ambassador and the Ambassador contact.

What happens if I need to cancel?

Speaking engagements at our participating companies are vital to the success of Metro United Way's annual campaign. They are often our only opportunity to inform donors and potential donors of the important work they make possible and thank them for their support. We hear repeatedly from company contacts that YOU and the stories you share are the key to moving employees to give.

Should you need to cancel a speaking engagement, please make every effort to find another trained staff member at your organization to cover for you, then notify Amanda Weegens, the Campaign Outreach Coordinator, of the change. If you cannot find another staff member to cover the meeting, please notify Amanda immediately so that we may find another Ambassador to cover the speaking engagement.

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