



Case Study - Global Non-profit

Targeting Charitable Giving at Mid-Sized Companies

THE CLIENT

United Way was born over 125 years ago in Denver, Colorado, serving as an agent to collect funds for local charities and coordinate their distribution to community services. Working primarily in the areas of education, financial stability, and health, they impact 50 million lives every year. With 1,800 regional organizations in 40 countries and territories, they are the world's largest privately-funded nonprofit.

THE PROJECT

United Way of Greater Philadelphia and Southern New Jersey engaged Fox MC to develop cost-effective strategies for marketing to their middle market segment (100-1000 employees), and develop a product and service mix that resonated with these firms. The changing political, legal, sociocultural and competitive landscape of the charitable giving industry was driving changes in the positioning of this organization.

KEY FINDINGS

The Fox team performed a detailed situation analysis, including interviews and secondary research, and determined that:

- Increasingly, employers and employees were seeking greater choice, transparency, and opportunity from United Way. The tools being offered to support companies during their campaigns were not efficient and did not align

“ The Fox team brought a fresh perspective to some long-standing challenges that not only validated some assumptions about our current ways of doing business, but also yielded new ways of thinking about a unique market segment. ”

– **President and CEO,**
United Way of Greater Philadelphia
and Southern New Jersey

with needed resources.

- Core customer needs were not being met, including the ability to determine the kind of giving employees engaged in, sufficient capacity for customizing each campaign, and the option to read about previous campaigns in a streamlined digital form.
- Companies wanted to hear back about the impact of their work. They were seeking clear communication about the value of giving to United Way.

United Way		Customers
<ul style="list-style-type: none"> Prefer Impact Fund giving 	Choice for Donation	<ul style="list-style-type: none"> Prefer letting employees have the choice
<ul style="list-style-type: none"> Utilize printed marketing materials Use a lot of text Use a lot of different pamphlets, papers - hard to keep track 	Communication	<ul style="list-style-type: none"> Prefer digital materials Want to see results through both data and impact stories Tend to lose papers, to not distribute
<ul style="list-style-type: none"> Employ high levels of customization Prefer standardization to minimize resources, time, and money 	Customization Level	<ul style="list-style-type: none"> Do not appreciate, realize customization Prefer campaigns customized to specific needs

DELIVERABLES

Based on their research, the Fox team provided United Way with the following:

1. Redesigned product offerings tailored to meet the needs of three distinct customer segments.
2. A marketing budget, noting specific opportunities for cost savings and highlighting strategic areas for expansion.
3. Marketing guidelines for redesigning marketing materials, including platform recommendations and key metrics for capturing customer interest and communicating impact.
4. Action steps and an accompanying timeline for implementing recommended changes.

RESULTS

United Way of Greater Philadelphia and Southern New Jersey is currently incorporating the findings of this project into a long-range plan ahead of their 100th anniversary in 2021.