

## Partnership Marketing Self-Assessment Tool

Agency: \_\_\_\_\_ Date: \_\_\_\_\_ Representative: \_\_\_\_\_

Title: \_\_\_\_\_ Phone: \_\_\_\_\_ E-mail: \_\_\_\_\_

Organizations receiving United Way of Greater Cincinnati investments are counted on to co-market and publicize the collaborative relationship in several ways agreed to in signing the Partnership Marketing & Fundraising Agreement that was part of the 2013-2015 Request for Proposal submission.

This partnership self-assessment tool is intended to enable UWGC's agency and community partners to highlight their marketing-related efforts in support of our common goals. Our partnership marketing efforts with agency and community partners are essential to demonstrate to more than 100,000 donors the power of our partnership and shared commitment to delivering measurable results that advance the common good and change people's lives

- Please assess your current practices by **February 6, 2015**.
- Check the applicable box, include related comments and submit the form below **(required)**.
- You may submit a folder or portfolio of samples to illustrate your co-marketing efforts' **(optional)**.
- Send completed forms to Toni Lehmkuhl, senior administrative assistant, marketing, [toni.lehmkuhl@uwgc.org](mailto:toni.lehmkuhl@uwgc.org) or fax to her at 513-762-7146
- Folders/portfolios may be sent to Toni at: United Way of Greater Cincinnati, 2400 Reading Road, Cincinnati, OH 45202.

Collaborative Opportunity	
<b>Impact</b> <ul style="list-style-type: none"> <li>• Program results</li> <li>• Continuous improvement</li> <li>• Financial reports</li> <li>• Success stories (2 minimum)</li> </ul>	Acknowledged within Call for Investment Letters
<b>Development</b> <u><b>Campaign performance</b></u> <ul style="list-style-type: none"> <li>• Participation rate</li> <li>• Per capita giving</li> <li>• Campaign results reported by</li> </ul>	information generated through annual campaign reporting process

Collaborative Opportunity	Doing/Completed	Not Doing or Completed/Reason
<b>Marketing</b> <u>Speakers' Bureau, Tours and Agency Profile</u> <ul style="list-style-type: none"> <li>• Participates in United Way's Speakers' Bureau training</li> <li>• Upon request, provides speakers, displays and/or tours in support of the annual campaign or other donor education efforts</li> <li>• Completes Agency Profile</li> </ul>		

(see <a href="http://www.uwgc.org/for-nonprofits">www.uwgc.org/for-nonprofits</a> ).		
<p><u>Logo Usage</u></p> <p>Include a 1-color, 3-color or black &amp; white United Way Agency or Community Partner logo and/or text line reading “A United Way Agency Partner” or “A United Way Community Partner” (see <a href="http://www.uwgc.org/for-nonprofits/tools-resources">www.uwgc.org/for-nonprofits/tools-resources</a>) on:</p> <ul style="list-style-type: none"> <li>▪ Annual reports (also reference UW funding in text)</li> <li>▪ Agency/program newsletters</li> <li>▪ Brochures for United Way-funded programs</li> <li>▪ Agency/program letterhead</li> <li>▪ E-communications</li> <li>▪ PowerPoint presentations</li> <li>▪ Videos</li> </ul>		
<p><u>Web Site, Social and Traditional Media</u></p> <ul style="list-style-type: none"> <li>• Identify United Way partnership with logo on agency home page and provide a link to <a href="http://www.uwgc.org">www.uwgc.org</a>.</li> <li>• Identify United Way partnership and include logo on social media sites.</li> <li>• Collaborate in media efforts/approaches. Mention United Way funding partnership in traditional (news releases, TV interviews etc.) and social media related to programs, services and/or initiatives funded by United Way. For example, use the sentence, “ [your agency name], a United Way Agency (Community) Partner, is launching.. .)</li> </ul>		
<p><u>Special Events</u></p> <ul style="list-style-type: none"> <li>▪ Include agency partner logo on event invitations and programs</li> <li>▪ Reference United Way from podium</li> </ul>		
<p><u>Signage</u></p> <p>Use United Way-provided signage as appropriate to your building, office space and vehicles (see <a href="http://www.uwgc.org/for-nonprofits/tools-resources">www.uwgc.org/for-nonprofits/tools-resources</a> to order at no cost to your agency):</p> <ul style="list-style-type: none"> <li>• Exterior (12” x 12”) laminate sign with holes for hanging on existing signage</li> </ul>		

<ul style="list-style-type: none"> <li>• Window cling decal 6"x 6", suitable for building or vehicle windows</li> <li>• Interior desktop name plate</li> </ul>		
<p><b>Other, e.g., banners, t-shirts, UWGC reference consistently appears in media stories, op eds</b></p> <ul style="list-style-type: none"> <li>• Include "A United Way Agency/Community Partner" in your phone/voice message greeting</li> <li>• Include a United Way logo on t-shirts, polos, etc., in connection with events and activities</li> <li>• Participate in United Way volunteer events (Community Care Days, Company Come Together Days, etc.)</li> <li>• Support the United Way campaign in your newsletter, on your web site, social media, etc.</li> <li>• Other</li> </ul>		

Please provide samples of materials and copies of major media stories that support your efforts to demonstrate the power of our partnership.

Questions and comments regarding the partnership marketing self-assessment tool: Patti Cruse, Associate Manager, Marketing, [patti.cruse@uwgc.org](mailto:patti.cruse@uwgc.org).