

The New National Goals, Issues and Indicators: What They Can Mean for Local United Ways

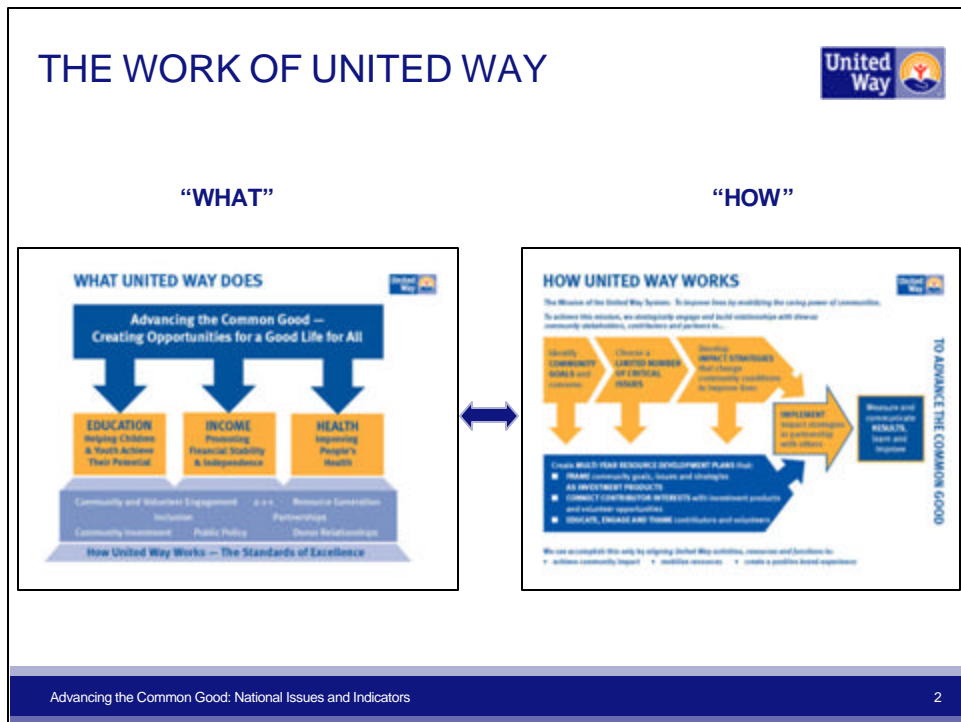
United Way
Community Leaders Conference

LIVE UNITED™



I'm Alex Sanchez, Senior Vice President of Community Impact Leadership at UWA.

This learning session is to give you a chance to learn more about the national goals that Brian announced yesterday, how they were created and what they mean for your United Way. We also want to give you a chance to ask questions you have about this exciting work that we're embarking on as a system.



Advancing the Common Good: National Issues and Indicators
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Earlier this morning, you were all introduced to this “What” and “How” slide depicting the work of the United Way. Hopefully you all took along your personal copy of the corresponding handout.

On the left – What United Way Does? – education, income and health
 On the right – How United Way Works? - operating according to the business framework and the Standards of Excellence

We also talked about how our work must be linked and integrated across both dimensions if we are to truly create opportunities for a good life for all.

This session falls under “what UW does”. It attempts to get at the collective value of “what UW does”, and how might we measure that value.

In March and in April we had a webinar on parts of this and 200-300 attended each one. So, this is really a continuation of a series of learning sessions related to this work.

Panelists



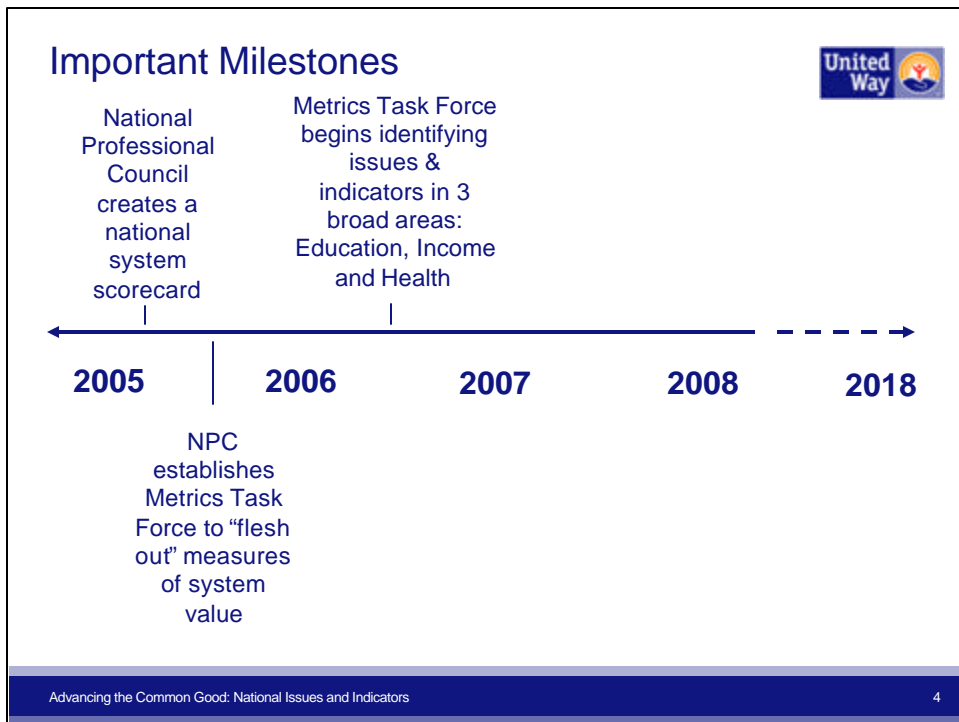
- Alex Sanchez, Senior Vice President, Community Impact Leadership, United Way of America
- Chris Kerrigan, President, Trident United Way, Charleston, SC, Chair of the NPC Strategies and Metrics Committee
- Deedra Atkinson, Senior Vice President, Community Building, United Way of Dane County, Madison, WI
- Sarah Burd-Sharps, Co-Director, American Human Development Report
- Jeff Elder, Director, Social and Economic Research, United Way of America
- Tish McCutchen, Director, Field Communications, United Way of America

Joining me today as panelists today will be[see list above]

- Alex Sanchez, Senior Vice President, Community Impact Leadership, United Way of America
- Chris Kerrigan, President, Trident United Way, Charleston, SC, Chair of the NPC Strategies and Metrics Committee
- Deedra Atkinson, Senior Vice President, Community Building, United Way of Dane County, Madison, WI
- Sarah Burd-Sharps, Co-Director, American Human Development Report. She's in charge of the publication of the first ever American Human Development Report, modeled upon the United Nations Human Development Report framework – which by the way is broken out into the same areas as our framework. Their report will be published in July.
- Jeff Elder, Director, Social and Economic Research, United Way of America
- Tish McCutchen, Director, Field Communications, United Way of America

First, we'll recap the issues and indicators that have been developed over the past 3 years. Then the the panel with address some of the questions that came directly from past webinars. Then, we'll open it up for new questions.

So, let's have Chris walk us through how we got to the point of having national goals:



•Chris: Thanks, Alex.

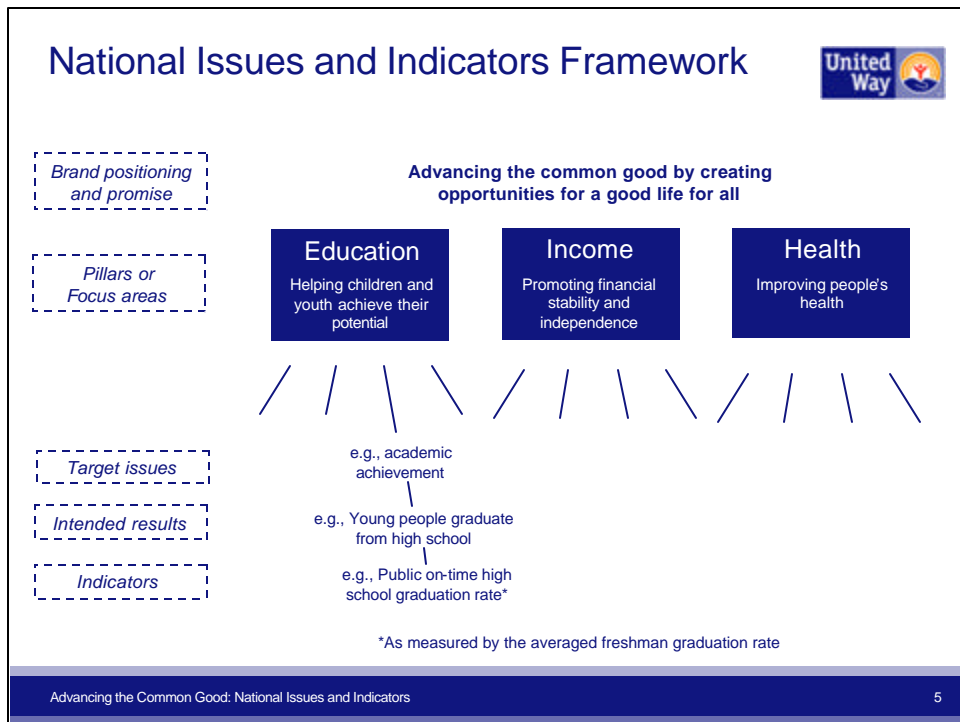
•The development of the framework and metrics began when, in 2005, United Way of America with the National Professional Council created a national system scorecard to reflect the United Way system’s performance in three areas: value, reputation and growth. While data on reputation already existed in public opinion surveys and growth numbers could be found in annual fundraising reports, we did not have any system-level measures for our collective value.

•In the summer of 2005, Mike Durkin, then-CEO of Mile High UW, agreed to lead an NPC Metrics Task Force to establish metrics that would allow us to report on United Way’s value as a system. The NPC Metrics Task Force was made up of representatives of 19 United Ways from across the country and of varied sizes.

•Beginning in 2006, the Task Force looked at responses to the Community Impact Practices Survey to identify the most prevalent community issues that United Ways were working on. At the same time, national experts were engaged to identify the most important issues within each of the identified broad areas.

•Combining this expert information with the identified common community issues yielded a hybrid list of ranked issues that fit into three broad areas. These areas came to be known as the pillars of the Advancing the Common Good Framework – Helping Children and Youth Achieve Their Potential (Education), Promoting Financial Stability and Independence (Income), and Improving People’s Health. This, in turn, became the foundation of United Way’s brand positioning.

•Next, research was conducted to identify specific metrics of success in the issue areas

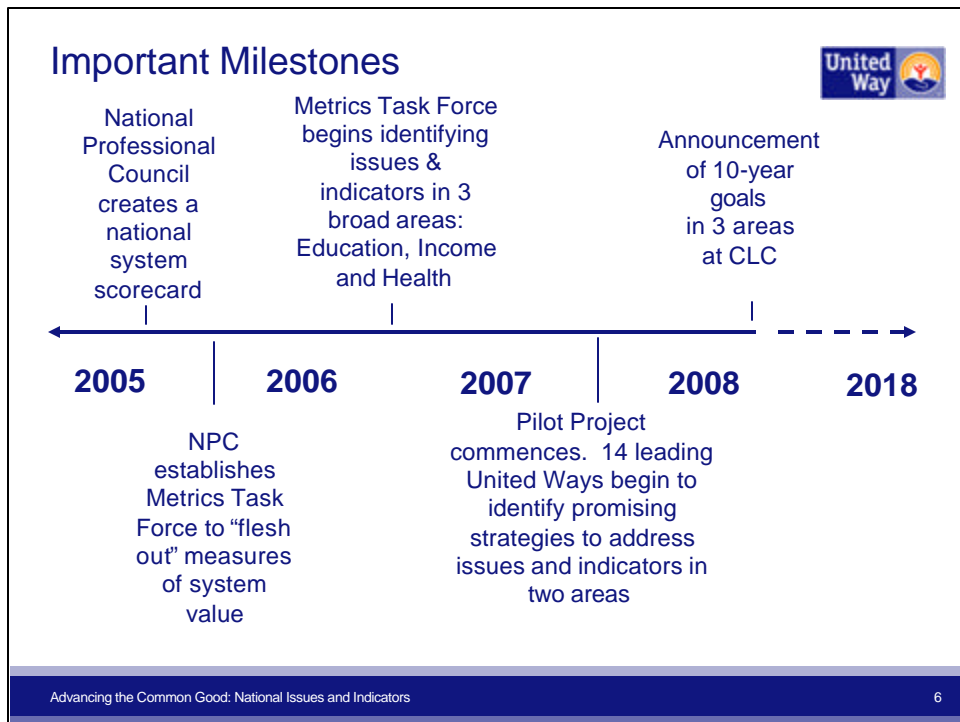


All of that resulted in a framework of the national issues and indicators.

You've got a full-page copy of the framework at your place so you can follow along.

The basic structure of the framework is:

- pillars of advancement or **focus areas**
- **target issues** within those broad areas (for example in the Education area “academic achievement” is one of the target issues)
- **Intended results** within target issues (for example, for the issue of “academic achievement” the intended result is “Young people graduate from high school”)
- And for each intended result there is an **indicator** defined. The indicator is how we are measuring the intended result on the national level with many of these measures also being available on the state and sometimes even local level (for example, for the intended result “Young people graduate from high school” we are measuring public on-time public high school graduation rate)
- Now the Goals for the Common Good report has a detailed account of the indicators, so that's a good reference for you. You should have gotten a copy yesterday at the General Session. If you didn't get one yesterday, we have a few extras on the back table.



After the initial list of indicators were developed, NPC turned its attention to a related issue – testing some of these indicators and finding strategies that work to address some of these issues at the community level. In October 2007, the task force initiated a year-long pilot project with 14 leading United Ways to explore strategies that achieve community-level change in the areas of the system’s most developed work, early childhood and financial stability, and to determine how to measure these changes.

I’ll pass it back to Alex, who can tell you more about how we arrived at the goals.

National Goals



Cut *by half* the number of students who drop out

- 74% in 2006 to 87% in 2018 = 560,000 more seniors getting diplomas on-time in 2018

Cut *by half* the number of financially unstable lower-income working families

- 36% in 2006 to 18% in 2018 = 1.9 million more stable lower-income working families in 2018

Improve *by one-third* number of healthy risk-avoiding youth and adults

- 34 % in 2005 to 45% in 2018 = 1.9 million more healthy young people in 2018
- 35% in 2005 to 45% in 2018 = 29.2 million more healthy adults in 2018

Alex: Thanks Chris.

The work of the original metrics task force culminated yesterday when Brian announced the 10-year goals to advance the common good.

So, how did we choose the issues on which national goals would be declared?

- It was important to be focused, but not exclusively focused on a single issue or focus area. So, one issue in each of the 3 areas was identified.
- In choosing these issues, it was important that the issue advance the corresponding aim of the focus areas:
 - Helping Children and Youth Achieve Their Potential ,
 - Promoting Financial Stability and Independence, and
 - Improving People 's Health.
- And lastly, we needed to walk a fine line with the goals -- not too timid, not too aggressive.

Ongoing Support

Online.unitedway.org/ACGindicators



- Data Support
 - Annual updates to data
 - Data availability matrix
 - Community Impact Practices Survey
- Resources on early education and financial stability from the Strategies and Metrics Pilot Project
- Archived webinars
- Listserv
- FAQ

At your tables you have a one-page document outlining and explaining various tools and resources to support you on an ongoing basis.

The first thing you should remember is: Go to United Way Online and use the keyword: ACGIndicators for all of the following resources.

- If you choose to adopt any of the issues or indicators for your community, but if you choose to, **data will be available** on the national level for your planning purposes. And in many cases state and even local level data will be available online. If exact matches are not available, we will provide you with our best sense of comparable measures on the local level in the data availability matrix that will be online later this week.
- Through the annual **Community Impact Practices Survey** we will be collecting case studies which include data on performance against these issues and results, so we strongly encourage you to submit your work and put your best foot forward. This will allow us to accurately gauge progress made on the local level and develop good examples for communication purposes.
- **Tools and resources generated by the Strategies and Metrics Pilot Project** will be made available. For example, they are now exploring what works to increase income on the community level and the findings of their discussions will be disseminated through United Way online and other channels.
- This and other **webinars** about the national goals, issues, and indicators are archived for later viewing. Later this year a series of webinars will be presented on implications of this framework for resource development and marketing staff.
- Also, we have a **listserv, frequently asked questions** (incl. many of today's questions)



With that background, I'd like to start off the panel today by taking on some of the top questions we've been hearing from you...

[GO TO SEPARATE WORD DOCUMENT]

Any questions from the audience? OPEN Q&A

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