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A photograph of a crowd of people with their hands raised in the air, set against a light blue sky. The image is partially obscured by a dark blue horizontal band containing text.

**moblize**

IMPACT STRATEGIES, RESOURCES & RESULTS  
UNITED WAY STANDARDS OF EXCELLENCE

Scope: Develop strategies that will achieve measurable and lasting change in community conditions, mobilize necessary resources and put them to work to produce positive results and improve lives.

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## introduction:

United Way has a proud history of raising and distributing funds. Our new mission of community impact challenges us to take that history to new heights where the focus is on issues, strategies and the actions needed to improve lives and create lasting change in our communities. You are called to broaden your definition of resources, moving beyond just dollars and including people's time, talents, goods, and expertise. The resources to achieve amazing results for your community are all around you. You will look for and find them in new places.

If success breeds success, then strong community outcomes and proven results will drive resource growth. In turn, resource growth will drive better results and more successful outcomes. In the future, your United Way will be viewed as the "go to" place to get things done in your community.

No United Way will be able to successfully focus on every community need. Once the community has identified issues that are most important, as described in *Community Engagement & Vision*, and developed strategies for how to best make change happen, then your United Way can choose where you can have the greatest impact, where your presence is most logical and natural, where you can mobilize people and resources, where you are able to measure and achieve results, and where you have a good likelihood for success. Your work will rely on a solid foundation of the other Standards of Excellence components as well.

**Your United Way will excel in the areas of impact strategies, resources and results if you are:**

- **Clearly focused on the issues and actions where you have the greatest potential to achieve results and sustained change**
- **Aligned so that all of your critical functions (planning, resource development, community activities and investments, outcome measurement and communications) are integrated around selected impact strategies**
- **Inspiring hope and confidence such that your community is excited about the potential for change and people are valued participants, eager to contribute all kinds of resources to achieve the desired outcomes**
- **Achieving results by getting the work done, the problems solved and change accomplished to make your community a better place.**

This work will not be easy because integration and alignment around community impact is new, sometimes confusing and very challenging. The actions outlined in the standards that follow will occur on parallel tracks and repetitive cycles, with multiple simultaneous activities building on and mutually reinforcing each other.

While much of the work is local, your United Way can look for help and opportunities to collaborate with others across the United Way system in many areas: research and best practice on community issues, outcome measurement, data management, market segmentation, research and knowledge, relationship building with regional and national donors/investors, relationship and donor data management tools, major gifts, and planned giving expertise. Working together will help make all of our jobs easier and yield optimal results.

**The critical places to start are:**

- **Create impact strategies and a plan for change**
- **Decide where your United Way will focus**
- **Build your relationships with key segments of donors/investors and learn their aspirations.**

## STANDARD 2.1: IMPACT STRATEGIES.

United Way and other partners engage the community in developing a comprehensive plan for impacting selected priority issues, identifying the lasting changes sought and the specific strategies needed. All those with an interest in the outcomes are included. United Way determines its role in the plan and focuses on selected strategies.

### Practices:

- 2.1(a) Issue Prioritization and Selection.** Review aspirations identified by community visioning and develop a process to select and prioritize issues.
- 2.1(b) Research and Development of Prioritized Issues.** Define and assess prioritized issues. Informed by available research and proven practice, develop ideas for how change can most effectively occur.
- 2.1(c) Planning for Change.** Create a plan to achieve desired results for each priority issue. Define the community's short- and long-term goals. Establish desired outcomes, objectives, strategies, and action steps. Identify who can best address specific elements of the plan.
- 2.1(d) United Way's Part in the Change.** Understand and select those priority issues where your United Way has the greatest potential and ability to make a difference. Decide what role you will play and for what elements of the change plan you will accept responsibility. Consider an array of possible actions and investments that have reasonable potential to impact the issue, ranging from basic direct service to prevention and development efforts to system change or community education initiatives.
- 2.1(e) Planning for Monitoring and Measuring Progress and Results.** Determine what you will measure, identify periodic milestones and plan for data collection.
- 2.1(f) Investment Products.** Frame strategies and outcomes as solutions to community issues. Package them as products that can be marketed and linked to community and donor/investor aspirations.
- Convey:
- What results your United Way and your partners in the community are committed to achieve
  - The impact those results will have on the lives of individuals and the broader community

- Why now is the time the results can and must be achieved
- What specific actions are needed
- An invitation for involvement.

**2.1(g) United Way Role in Non-Priority Issues.** Determine your United Way’s role in the broader range of issues not selected for focus (e.g., financial support, political support, attendance at meetings, building awareness).

### STANDARD 2.2: PARTNER ENGAGEMENT.

United Way deliberately and actively builds quality relationships with traditional and non-traditional partners and involves them at every step of the way. United Way engages partners around priority community issues, shared strategies and corresponding resource development.

#### Practices:

**2.2(a) Partner Identification.** Identify individuals, service recipients, donors/investors, philanthropic foundations, community and neighborhood groups, and organizations from public, private, faith-based, labor, and nonprofit sectors that have an interest in priority issues and strategies.

### “Partnership matters”

**There is perhaps nothing so needed yet so challenging to achieve as the development of high-impact partnerships. Diverse partners bring expertise, perspective, legitimacy, and resources. Partner well. Share responsibility, control and credit.**

**2.2(b) Partner Mobilization.** Mobilize and work collaboratively with others to define prioritized issues, establish desired outcomes, identify barriers, determine strategies, and take action. Reach out to those with specialized skills and expertise as well as others who have a special interest, idea or talent they wish to bring to the work. Measure your success in mobilizing partners.

**2.2(c) Participation in Others’ Processes.** Participate in collaborative efforts convened and led by others where efforts coincide with the mission and the priority issues and strategies selected by your United Way.

- 2.2(d) Respect for Partners.** Develop mutual trust and respect by valuing input from all partners. Identify specific roles based on expertise, capability and interest. Establish shared accountability.
- 2.2(e) Communication.** Whether leading or participating in a project or collaboration, ensure effective, clear and regular communication among all partners about relevant activities and results.
- 2.2(f) Partner Recognition.** Regularly and appropriately acknowledge and recognize the involvement and work of partners through internal and external communications.

### **STANDARD 2.3: RESOURCE DEVELOPMENT AND MOBILIZATION.**

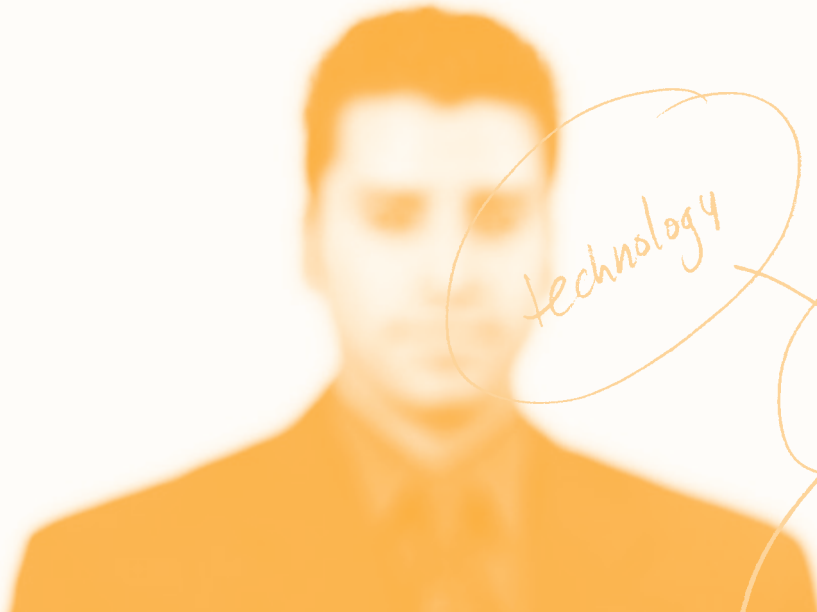
United Way mobilizes the many community assets—money, people, knowledge, relationships and technology—needed to implement strategies and achieve meaningful results. United Way builds personal relationships with donors/ investors, segments markets based on interests, and recognizes all contributions.

#### **Practices:**

- 2.3(a) Resource Development Trends.** Maintain knowledge of current trends and effective practices for mobilizing resources by:
- Conducting and/or consulting research on giving trends, best practices, and investor preferences
  - Being familiar with the current economic and philanthropic environment to maximize growth potential
  - Exchanging information and knowledge with other United Ways.
- 2.3(b) Resource Development Plans.** Develop a flexible multi-year resource development plan that supports impact strategies, includes key market segments (e.g., individual donors/investors, volunteers, funders, etc.) and ensures a balanced and diverse revenue base from multiple sources.
- 2.3(c) Market Segmentation.** Target specific traditional and non-traditional audiences for support, using demographic data, giving potential, past history, and philanthropic interest.

Our nettlesome task is to **discover**

how to organize **our strength** into





people

# compelling power

knowledge

Martin Luther King Jr.

**2.3(d) Relationship Management Approach.** Develop personal relationships with individual donors/investors. Understand their interests and aspirations and match those interests, where appropriate, with investment products (i.e., community goals, impact strategies and associated activities). Track investments, United Way interactions, communications, recognition, and acknowledgements. Maintain personal contact year-round through multiple channels.

2.3



**We must see the entire community as a potential source of the resources we need. It is not solely about an annual workplace fundraising campaign. Look both inside and outside for the full breadth of resources we will need to achieve our strategies—people, knowledge, relationships, technology and financial assets.**

**2.3(e) Workplace Development.** View each current and prospective donor/investor in the workplace as an individual customer. Help employers understand the value and benefits of your relationship with these donors/investors and the potential for impact on community issues. Begin with knowing individuals' names, contact information and giving history.

Build and sustain relationships with various segments within the workplace (e.g., new, current and retiring employees, senior leaders, and labor members). Maintain active, targeted communications year-round.

**2.3(f) Major Gift Research and Cultivation.** Identify prospective major donors/investors both inside and outside traditional campaign settings and market segments. Conduct activities to attract prospective donors/investors throughout the year, build relationships with them and provide opportunities for their engagement and participation. Link aspirations of prospective donors/investors to investment products (i.e., community goals, impact strategies and associated activities).

**2.3(g) Planned Giving.** Establish a program for cultivating planned giving as a natural extension of a lifelong relationship with a donor/investor. Institute policies and procedures for the acceptance and management of a

variety of planned giving options. Consider the creation of an endowment to manage planned and other gifts.

**2.3(h) Grants.** Establish a formal grant-seeking function, including research, grant writing and grant administration to support impact strategies and achieve desired outcomes. Grant sources may be corporations, private foundations or government. Grant revenue should be an ever-increasing share of the resources that your United Way helps leverage for the community. Not all grants leveraged will flow through United Way's books, and your involvement must be accounted for in different ways.

**2.3(i) Collaborations.** Leverage relationships and explore collaborative resource development opportunities with selected partners, groups or organizations that have a mutual interest in a priority community issue or impact strategy.

**2.3(j) Individual, Volunteer and In-kind Resources.** Mobilize the involvement of individuals, volunteers, donors/investors, community groups, and organizations in implementing impact strategies and achieving desired results. Contributions might include time, goods, energy, talent, expertise, and in-kind resources.

**2.3(k) Donor/Investor Recognition.** Continually recognize and thank all who contribute resources of any kind. Let them know what their contributions helped to accomplish.

**2.3(l) Technology.** Utilize innovations in technology to mobilize resources and impact strategies. Seek technology solutions to enhance access to grant sources, relationship-focused investor databases, efficient and profitable pledge processing and distribution, timely and accurate campaign reporting, and online volunteer opportunities.

#### **STANDARD 2.4: IMPLEMENTATION AND ACTION.**

United Way recognizes that community impact cannot be achieved through any single strategy, action or investment. United Way implements a diverse array of impact strategies and actions to achieve desired results and improve lives (beyond merely funding agencies, programs or services). In all activities, United Way strives to include those individuals most affected by an issue. United Way explores strategies that go beyond our traditional service orientation and address root causes, as well as system-level barriers and challenges.



### Do you have a strategy that:

- Is thoughtfully mapped out?
- Goes beyond funding direct services?
- Will lead to lasting change in community conditions?
- Seems reasonable and plausible?

#### Practices:

##### 2.4(a) **Investment in Programs and Initiatives That Produce Results.**

Develop and invest in programs and initiatives that align with priority issues and accomplish impact strategies. Include existing programs, new programs and special initiatives. Identify what continuum of programs, from basic direct service to prevention and development efforts to system change or community education initiatives, and what investments are needed to affect root causes and create desired results.

**2.4(b) Collaboration.** Convene, support, join, or lead collaborative efforts and joint projects that address priority community issues and achieve desired results. When appropriate, undertake efforts to address comprehensive system reform.

**2.4(c) Donor/Individual Recruitment and Engagement.** Recruit and engage donors/investors and appropriate community groups as active participants to help implement strategies and produce results.

**2.4(d) Public Policy.** Engage in legislative advocacy for government appropriations and changes in laws, public policies and administrative practices that promote or support desired results.

**2.4(e) Technology.** Utilize and leverage technology to help identify and provide information (including best practice research), improve services, garner resources, and achieve and measure results.

**2.4(f) Public Education.** Inform and educate individuals, donors/investors and partners about issues and opportunities to improve lives in the community. Look for ways to create new thinking, eliminate barriers, and develop the civic will and support necessary to achieve results.

- 2.4(g) Community Economic Development Strategies.** Support community-based economic development activities to increase opportunities and enhance the economic well-being of individuals and families.
- 2.4(h) Research.** Conduct and/or use research to better determine the extent of community problems and how various populations are affected. Use research, where needed, to help evaluate results and the effectiveness of impact strategies. Communicate findings to build public awareness, motivate action and mobilize resources.

**STANDARD 2.5: MEASURE, EVALUATE AND COMMUNICATE RESULTS.**

United Way and its partners evaluate the effectiveness of impact strategies in order to continuously improve. They identify appropriate measures, collect and analyze results, and assess progress toward desired outcomes. Outcomes may be measured at multiple levels (e.g., programs, system and community). What is learned may cause United Way and partners to re-think, change or adjust strategies, actions and investments.

United Way of Greenville County's **Success By 6<sup>o</sup>** prepares an annual status report for "The Greenville County Child Care Initiative" to communicate progress toward achieving its community goals. The report includes aspirations, accomplishments, yearly trends and community changes in the four goal areas of quality, availability and affordability, stakeholder education, and public policy. It also addresses the status of each goal (better, worse, or unchanged). **Success By 6<sup>o</sup>** and partner affiliates then use the data from the report to determine which strategies are working and which may need course correction.

United Way regularly and transparently communicates impact strategies, activities and results to donors/ investors and the community, always acknowledging the contributions of partners. Results may become part of a community report to communicate progress.

**Practices:**

**2.5(a) Outcome Measurement and Evaluation.** Measure outcomes, recognizing that it is difficult and results often take time to emerge. Collaborate with others and commit resources, training and technical assistance to assist your community and community organizations with outcome measurement. Periodically review near, medium and long-term goals and strategies in light of your evaluation results and make adjustments as needed.

**2.5(b) Integration and Communication of Community Impact Messages.** Effectively integrate and communicate clear and concise community impact messages—outcomes, strategies and investments—in your materials, presentations and special events. Tailor information to target audiences, communicating what they want and need in an appropriate format and at the right time. Report on progress toward goals and success achieved.

**Mission:** To improve lives by mobilizing  
the caring power of communities

**Vision:** We will build a stronger America  
by mobilizing our communities to improve  
people's lives



what matters.®

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