

**QUICKSTART  
GUIDE FOR NEW  
UNITED WAY  
EXECUTIVE  
OFFICERS**

# WELCOME

The Quickstart Guide is a combined effort of the United Way Worldwide Community Impact Leadership & Learning Team, United Way Retirees Association and the Council of States. A thank you also goes out to the various United Way Worldwide departments that lent their expertise.

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# Introduction

Welcome to your new role as the United Way Chief Executive Officer. Although you may have served as a United Way staff, volunteer, agency director, or been a business leader or affiliated with another non-profit, you will find that being the United Way CEO can be a surprisingly complex and daunting task.

This updated *Quickstart Guide for New United Way Executive Officers* is intended to provide you with the basic first steps for leading a United Way. It will help you divide your work load into manageable components and provide resources that prepare you for your role as a community leader. The Guide is divided into six areas that address the overall operation of an organization. It lists tasks for setting short- and long-term goals. Do not expect to accomplish every task listed. Generally, new executives say it takes one full year – one cycle of the operation – before you can begin to feel confident. This Guide is designed to be easily updated. You will find the latest revisions at United Way Online.

All United Ways have a common language and a universal set of operational standards, (see United Way Worldwide Standards of Excellence and Membership Requirements). However, each United Way is different, depending on its size, history, previous leadership and the community dynamics. One of the first duties of a new executive is to assess staff and volunteer commitment to the mission and the effectiveness of the organization in achieving its commitment to education, income and health.

Leadership can assure long-term results by establishing a balance between affirming the successes of the past and moving forward to serve as a mobilizing force for social change, and by establishing deeper relationships with individuals and institutions to support the education, income and health goals. A key to success is to keep strategies that work and utilize all your skills and resources to make needed changes. It takes patience, political savvy, time and task management, continuous learning and a passion for wanting to make a difference in your community.

This guide provides the new executive with proven procedures that will help you develop confidence and achieves success. It is not intended to cover every task from turning on the lights to inspiring the community. Remember that each job is unique, depending on the progress of your United Way, your experience, the size of your organization, your staff and your community.

# United Way A Unique Community Leader

With a United Way in virtually every city, county and region within the United States and in many countries internationally, the collective power to organize for community change is amazing. Using that power effectively is the goal of every United Way executive.

As a new United Way CEO, you will want to become knowledgeable about the United Way system's collective objective for 2018 of Advancing the Common Good National Issues and Indicators. United Way's National 10-year Goals for the Common Good, designed to achieve its objectives, are provided below:

<b>Helping Children and Youth Achieve Their Potential</b>	<b>Promoting Financial Stability and Independence Among Working Families</b>	<b>Improving People's Health</b>
<p><b>Goal:</b> Cut in half the number of youths who drop out of high school.</p> <p><b>Target:</b> By 2018, 87 percent of high school seniors will graduate on time, up from 74 percent in 2006.</p>	<p><b>Goal:</b> Cut in half the number of lower-income working families who are financially unstable.</p> <p><b>Target:</b> By 2018, 82 percent of families with one or two parents working 50 or more weeks (combined) during the previous year and incomes less than 250% of the federal poverty level will spend less than 40 percent of their income on housing, up from 64 percent in 2006.</p>	<p><b>Goal:</b> Increase by one-third the number of youth and adults who are healthy and avoid risky behaviors.</p> <p><b>Target:</b> By 2018, 45 percent of youth and 47 percent of adults will be healthy and avoid risky behaviors, up from 34 percent of youth and 35 percent of adults in 2005.</p>

To learn more about this system-wide initiative, go to [United Way Online](#).

Over time, United Ways have changed from being the premier community fund-raiser for member agencies to a leading force for advancing the common good through commitment to **Education, Income and Health (EIH)**. Strategies include increasing high school graduation rates, improving financial stability and creating healthier lifestyles by working with diverse partners to build strong systems that change community conditions. With the mission of serving as a mobilizing force for social change, United Ways are visible year-round with other community leaders to create a positive force for change. So, does this mean that United Ways are no longer in the business of fund-raising? Not a chance. Driving revenue and resource generation for the network and **United Way Worldwide (UWW)** is the key to ensure long-term growth and sustainability. United Ways are now known for being more than just fund-raisers.

As the United Way executive, you provide leadership, along with your volunteers, in setting a vision for the United Way. Encouraging the larger community to have a voice in and contribute to developing a shared vision for community change is a new and exciting dimension to the executive's role. It is extremely important to build a volunteer workforce along with volunteer management, so that you gain the ability to lead and be led by volunteers within your community. As you settle into your new position and begin to understand your unique role, you will want to reach out to a vast network of support, including the following resources:

- United Way Worldwide
- State Association/Organization
- Neighboring United Ways
- United Way Retirees Association
- United Way Volunteer Workforce

Equally important to learning about your local United Way is learning about your relationship with United Way Worldwide (UWW). We suggest you start by reading the following two publications:

- United Way Worldwide Membership Requirements and Toolkit
- United Way Worldwide Standards of Excellence

In describing what it is like to absorb all the dimensions of his new job, one new United Way executive said, "It is like drinking out of a fire hose." Setting priorities is a challenge and will change, depending on your previous experience and the community. Even if you are from the community, you are the new face of United Way and need to be known in your new role. Experience within the United Way system may give you an advantage in knowing the basic operation of the organization; however, each United Way provides different challenges and opportunities.

While you are getting to know your United Way and the community, be careful not to criticize or be negative about past events and leaders. Events occur in the course of time. Even if previous decisions may not be relevant for today's United Way, these same volunteers and staff may still be involved, and they will not want to be discounted for their hard work. Focus on looking forward and building from the strength of the United Way that attracted you to your new position.

Being a leader also manifests itself in being a community partner with the traditional member agencies and the broader community. Open communication and engagement with a commitment to EIH in developing strategies for social change will help avoid problems and compromise success.

# United Way Leadership Competencies

## CEO's Critical Competencies

The four categories of critical competencies, listed and discussed below, are those that a United Way leader needs to successfully mobilize communities in order to achieve results toward the 2018 goals:

### Engage community and provide leadership

### Build relationships and develop resources linked to EIH impact strategies

### Demonstrate business acumen and effective execution

### Model exemplary values and personal attributes

#### Recognized leadership and results in Education, Income and Health.

A United Way must be recognized as one of the key community thought leaders and results-oriented action leaders involved in the work of EIH. The Standards of Excellence provide the pathway to achieve this recognition when a local United Way articulates the community-level benefits around EIH and supports a coordinated community effort to achieve results and momentum on interim metrics of success toward the 2018 goals.

#### Community-wide engagement.

A United Way turns outward to engage with and listen to the diverse stakeholders in the community in ways that both guide and inform United Way's work. Community-wide engagement allows the community's priorities to become United Way's priorities. This is the point at which the United Way can identify a common vision for community solutions and build a critical mass of support to achieve long-term goals. This requires authentic interaction and engagement with the entire – diverse and inclusive – community focused on listening and surfacing the critical challenges. By developing long-term strategies to address community priorities in EIH, United Way and its partners are positioned to respond to and address the challenges. The United Way, therefore, must be a broker of relationships within the community and an integrator of those relationships toward the desired results.

#### Institutional and individual engagement and relationship management.

United Way must better understand, relate to and engage with individuals and institutions to improve their experience with United Way and

generate longer-standing and more significant relationships with them in order to Advance the Common Good.

- **Corporations:** A United Way must create more robust corporate relationships by aligning EIH strategies with corporate philanthropic/ social investment objectives. The realignment incorporates a re-imagined workforce campaign, employee volunteer efforts, cause-marketing opportunities, corporate diversity alignment and other programs.
- **Other Institutions:** Private foundations and state/local governments are critical partners and stakeholders as funders to local United Ways, and/or in simply aligning resources to EIH strategies that strengthen community level results. They are also critical in driving policy change as decision makers or influencers.
- **Individual engagement:** United Way must attract, at scale (through the existing workforce channel, along with newer media channels and cause-marketing), individuals to the priorities of EIH and inspire them to move to action – Give, Advocate and Volunteer. Through effective constituent relationship management, recruitment toolkit for the workforce, social media and other tools, United Way provides a platform for individuals to take action. By building loyalty and emotional attachment to United Way's priorities, it is positioned to build and scale relationships with new individuals beyond the existing donors. As an example, the breadth of this engagement extends from: low-income parents able to advocate for a policy change that might provide professional development and incentives for teachers to ensure kids are reading on grade level by 4th grade to Tocqueville donors who want to align their giving to helping kids with early grade reading.

In advancing this work, United Way must focus on building a relationship-oriented culture, moving away from one centered on transactions.

## Strategic communications.

Effective strategic communications must strengthen and align United Way's message about its value proposition and build greater public will to act. United Way must also find new ways of leveraging corporate and media partnerships to generate more visibility and awareness of its work and its impact. More consistent and regular messaging will ensure greater public awareness of the issues. It expands the public will in support of United Way's causes and reinforces United Way's role in the community to address EIH priorities. The ability to effectively communicate with the diversity of stakeholders, including, for example, agency partners; community organizations; corporations; high net-worth donors; student volunteers and others, requires an extensive breadth of expertise. United Way messaging should be deliberate, intentional and coordinated. National and global messaging ensures that a local United Way can develop complementary communications and messaging.

- **Issue advocacy for EIH.** A United Way must build and manage coalitions and alliances that are in alignment with United Way's long-term EIH goals. This includes grass-tops and grass-roots organizing and mobilizing, building and maintaining public awareness, and advocating for policy change. This ability must exist to effect change locally. It must also, when appropriate, be flexible to align with other state-wide and national efforts. Legislative change at local, state and national levels can be influenced through direct lobbying and/or through advocacy of the general public. United Way's ability to galvanize interested supporters to express their views in support of needed policy action is important in efforts to improve EIH conditions.
- **Revenue and resource generation**
  - *Revenue.* A United Way can develop diverse and growing revenues by expanding who, what and how it approaches revenue generation and by integrating resource development efforts with EIH strategies. A marker of success might be, first, how much funding a local United Way attracts and controls in support of EIH efforts. A second marker is whether United Way's efforts represent an increase community-wide in the amount and/or degree of alignment of funding to its issues.

## Key Terms

**Community Engagement** This strategy encourages community members to get involved with activities that enhance community life and contribute toward developing and achieving a shared vision for the future.

**State Organizations/Associations** A staffed organization or loosely knit federation of United Way executives, they work to support state public policy issues and state campaigns. They provide training, consultation, peer networks and other resources to individual United Ways.

**United Way Retirees Association (UWRA)** UWRA is a voluntary membership organization comprised of current and former United Way staff. It is a resource for the United Way system. Membership in UWRA is about tenure in and commitment to the United Way movement and leveraging member's talents and expertise to promote and provide programs that strengthen United Way. In addition to advocacy activities, services offered include help in the areas of endowment and planned giving, mentoring, community impact, interim assistance, disaster relief and retirement planning.

**United Way Worldwide** A national and international organization, UWW provides leadership and support to the United Way movement. UWW leads the movement through public relations, national brand advertising, the National Football League partnership and the management of relationships with national corporate and philanthropic partners, and the federal government. UWW provides support services to United Ways that include training, consultation, conferencing, brand presentation resources, videos, national research and assessment, and outcome measurement tools.

**Vision** A statement about what the United Way ultimately wants to have happen as a result of its efforts and what it will become in the future. The United Way system's vision statement is: *United Way envisions a world where all individuals and families achieve their human potential through education, income stability and healthy lives.*

- *Volunteer Engagement.* A local United Way must be intentional about driving more volunteer activities to support EIH. Volunteer engagement is an essential competency for all United Ways. Like fundraising, volunteer mobilization is critical to United Way's long-term community change work, building new and strengthening existing relationships with individuals, and working well with companies and other institutions. Volunteer approaches include offering companies and employee's volunteer experiences. It invites the community to **LIVE UNITED®** with National Day of Action June 21. It engages young people through Student United Way and ongoing volunteer opportunities through a volunteer center or long-term strategy.







# Community Impact

Community impact means improving lives by creating lasting changes in community conditions. The United Way system advances the common good by creating opportunities for a good life for all. It focuses on EIH – the building blocks for a good life. Creating and improving opportunities in these three focus areas requires creating lasting changes in community conditions that negatively influence individuals and families. These conditions include policies and practices, attitudes, coordination, access and resource use of organizations, associations, systems, services, neighborhoods and even personal networks.

As a new CEO, you will hear the term “Community Impact” and find it has many interpretations. UWW views community impact as improving the lives of community populations by changing conditions in the community.

Creation at this level of change calls for a special approach to working with communities. To meet this challenge over the past few years, the United Way system has been undergoing a transformation, moving beyond its historical role of raising funds and allocating them to community agencies or programs. In its new business framework, United Way galvanizes and connects a diverse set of individuals and institutions and mobilizes resources such as people, organizations, businesses, associations, time, talent, relationships, expertise, technology and financial assets. Its goal is to identify pressing community EIH issues, foster agreement on comprehensive strategies for community change, and collaborate on implementation – all in support of a stronger community.

The pressing issues that your United Way works with your community to address can be identified by turning outward to engage with and listen to the broad and diverse cross sections of the community to understand the aspirations and conditions that are important to the community. In addition to listening to community members, it is important to look at local data and relevant research to clarify the community challenges and underlying conditions that cause or contribute to them. As you’ll see in a later section of this Guide, engaging with the community does not stop with the identification of issues to

be addressed; it is an ongoing process as the community contributes perspectives and shapes decisions all along the way.

Meaningful community engagement presents opportunities to build and deepen relationships with a range of community stakeholders, including individuals, corporations and other organizations. Many of these stakeholders will be central in the implementation of the community impact strategies that are built through the engagement process. Because they have participated in the work, these stakeholders will be ready to give, advocate and volunteer to ensure the strategies’ success.

If there already are written community impact plans for addressing pressing issues, one of your early steps as a new CEO will be to learn how they were developed and what they say; for example:

- On which community populations do the strategies focus and what are the intended results?
- How will those results be achieved?
- What responsibilities for strategy implementation has your United Way agreed to fulfill?
- How are progress and results being measured for both the overall strategies and the specific implementation activities for which your United Way has taken responsibility?

You will want to see whether the strategies only talk about providing direct services or if they also call for changes in organizations, associations, systems, services, neighborhoods, personal networks, for example, that influence the population of concern.

Because most underlying causes require some degree of system change, there is an important role for public policy advocacy in most community impact strategies. Awareness of, and involvement in, determining local public policy priorities to advance change in community conditions is an important aspect of community impact. Non-profits can legally take a position on legislation or policy, engage with public officials in an attempt to influence their decisions and participate

in nonpartisan voter registration without jeopardizing their non-profit status.

Appropriate community impact strategies need to be framed as investment products that connect investors' interests with community needs and opportunities for change. This critical step ensures that community challenges you work on also drive the resources and revenues to support the work and sustain your United Way.

It is important to bring community stakeholders, including funded agencies and other partners, along every step of the way through ongoing strategic communications. Continuous engagement with and education of the community and all of its key stakeholders and staying true to shared community aspirations will lead to a stronger, more relevant United Way. A stronger United Way can mobilize and galvanize institutions and individuals to give, advocate and volunteer in support of the community's impact strategies.

#### **Leadership competencies:**

- Change management
- Community engagement and listening
- Strategy development and collaborative implementation
- Motivation of staff and volunteers.

### **Key Terms**

**Community Assessment** An effort to identify and understand the community's challenges. It starts with turning outward to engage with and listen to the community and understand the aspirations, issues and current state of affairs in the community. The assessment also uses existing data and new research as needed.

**Community Impact** Improving lives by mobilizing communities to create lasting changes in community conditions.

**Impact Strategy** A carefully selected and research-based set of approaches implemented to achieve specific results for a defined population to create lasting community changes that address the underlying causes of an issue.

**Mission** Your United Way's overriding purpose or reason for being. It is what you do, for whom and how your United Way is different.

**Partners** Individuals or institutions with which United Way works to achieve community impact. Generally used when referring to entities that provide resources other than money, for example, services, expertise, technology and connections. It includes, but is not limited to, those traditionally referred to as partner agencies, which are United Way-funded organizations that provide health and human services.

**Public Policy** The combination of goals, laws, rules and funding priorities set by public officials that determine how government meets needs, solves problems and spends public funds. Non-profits influence public policy through advocacy, lobbying, relationship building and educating the public and policymakers.





# Governance

In partnership with the CEO, your Board of Directors is accountable for your organization's performance, reputation and stature in the community. The Board is legally responsible for the organization and for your hiring. Understanding the role of the Board and developing a productive relationship is necessary for success.

The role of the Board is to make policy in areas of finance, personnel and legal issues and to provide leadership in setting the vision and developing goals for the organization. Working with a Board is a balancing act that requires great finesse. The Board leadership (Executive Committee) will look to you for accurate information, updates on the latest developments in United Way, well planned meetings and productive time together that gets results, gives constructive ideas and honest answers.

The integrity of your volunteers is on the line when they serve on the United Way Board and committees. They want to feel their time is well spent, that the organization is accountable and responsive, that they are part of a viable community force and that they are appreciated. Some of your volunteers represent major donor groups or businesses. Be sure their employers are recognized for giving their time and that you are always aware of this commitment beyond their daily work load.

The Board must represent the diversity of your community. Historically, United Ways recruited CEOs and top business leadership. Adding to that mix, today's United Way volunteers need a strong commitment to change and an understanding of building collaborations outside the traditional partner agencies and to reflect the service area of the United Way.

The Board sets the core values for the organization, which define the behaviors that will be evident in their relationships, both with each other and the broader community. The core values of UWW and many local United Ways include the following:

- Commitment to community success
- Results-oriented
- Integrity and accountability

- Operational excellence
- Volunteerism
- Collaboration
- Inclusiveness
- Innovation
- Customer-centered

The fiduciary responsibility of the Board historically has been a major part of its role. Making decisions around setting the budget and investing funds were the tough decisions. These business decisions still can be politically volatile if the United Way is unclear about its mission and how aligning resources is critical to seeing visible and measurable change. The CEO must prepare the volunteers for decision making by providing facts and rationale for every major decision.

Board members are fully supportive of the campaign by adding their reach to expanding the campaign and championing the United Way within their spheres of influence. They will need key messages that are consistent with the ongoing communications. Arm them with any "breaking news."

Locate a copy of the current bylaws of your United Way. These are the internal rules for how the organization will be governed, and you should be familiar with their provisions. Familiarize the Board and staff with UWW's guidance supporting Membership Requirement as it represents best practices expected of United Ways.

Expanding your knowledge and understanding of Board relationships can be done through accessing resources such as BoardSource ([www.boardsource.org](http://www.boardsource.org)) or you may want to reference helpful books, for example, *Boards that Make a Difference* by John Carver and *The Source: Twelve Principles of Governance That Power Exceptional Boards* by BoardSource. Another avenue is to ask your state association for training resources. Review the standards for United Way governance provided in *Implementation Standards for Membership Requirement C*, and discuss with your board how to best meet these requirements.

Capable Board members are fundamental to your organization's success. Board development, including identification and recruitment of prospective board members, ensures future leadership with the skills and diversity needed to govern the organization. It is the collective responsibility of the current Board members to direct this process with your support as CEO to help assess the board's needs.

Orientation of new members and ongoing Board training add vitality and renewed purpose for the members. Having a Board retreat that updates the role of the United Way is a must. Review and renew, if necessary, your mission, vision, values and strategic direction. Report and celebrate your accomplishments. Have fun together.

Your Board may like the idea of meeting with Board members of your community partners, not just the traditionally funded ones. It is an opportunity to get to know each other (build trust) and to update everyone on the work of United Way. Some United Way Boards decide to match board members as partner liaison to provide better communication.

As the new executive, building a relationship of trust, accountability, mutual respect and understanding is your top priority. Schedule major touch-points with volunteers to monitor your progress and relationship.

### Leadership Competencies:

- The ability to build and manage productive relationships with volunteers through an open, friendly and accepting environment.
- The ability to network and partner with all stakeholders.
- The ability to explain, advocate and articulate facts and ideas in a persuasive manner and to negotiate with individuals and groups.

### Key Terms

**Board of Directors** Volunteers who set policy and who are responsible for selecting, employing and evaluating the CEO to ensure that the organization receives competent management. Board members have a legal and moral obligation to educate themselves about the affairs of the organization, to know the financial situation, to set strategic direction and to take responsibility for the organization's development.

**Chair of the Board of Directors** Provides leadership to the volunteer board in fulfilling its responsibilities for governance, acts as spokesperson for the board, presides over board meetings, motivates and holds the board accountable, provides supervisory contact for the United Way CEO.

**Diversity** Differences among groups of people and individuals based on factors that may include, but are not limited to, ethnicity, race, socioeconomic status, gender, language, religion, sexual orientation and geographical areas.

**Executive Committee** Officers of the Board of Directors that may include committee chairs.

**Fiduciary** An individual, corporation or association holding assets for another party, often with the legal authority and duty to make decisions regarding financial matters on behalf of the other party.

**Values** Values are traits or qualities that are considered worthwhile. They represent your United Way's governing beliefs that drive decisions and define how people behave toward each other.





# Brand & Relationship Management

A brand is a relationship. Like good human relationships, good brand relationships require authenticity, consistency in what you say and do; interaction rather than one-way communication, responsiveness and integrity.

## The Rubik's Cube

Imagine a Rubik's Cube. On one side, it has the building blocks for a better life – *Education, Income and Health*. On another side, it has three engagement strategies: *Give, Advocate and Volunteer*. On a third side, it has United Way's formula for improving relationships: *Ask, Thank and Inform*.

Instead of getting all the sides to match like a regular Rubik's Cube, your job is to mix them up so that your supporters understand your work – *Education, Income and Health*, participate on an ongoing basis – *Give, Advocate and Volunteer*, and feel a stronger connection – *Ask, Thank and Inform*).

What this means is that for each of the three action areas – *Education, Income and Health* – you have to provide opportunities to *Give, Advocate and Volunteer*. And, with each engagement opportunity, you begin with an *Ask*, followed by a message of *Thanks* and ongoing updates on your progress – *Inform*.

No peeling off the stickers and sticking them back in the right places. That's cheating. This new brand experience requires change from the inside out. You have to be actively working on *Education, Income and Health*, measuring the results and presenting authentic engagement opportunities on a year-round basis.

## The Message Platform

In order to recruit people and organizations and invite them to be a part of the change requires speaking with a united voice. The messages that make up the message platform have been rigorously tested with consumers to clearly bring your invitation to the world.

United Way advances the common good by creating opportunities for a better life for all.

The focus is *Education, Income and Health* – the building blocks for a good quality of life. United Way recruits people and organizations that bring the passion, expertise and resources needed to get things done. United Way invites you to be part of the change. You can give; you can advocate and you can volunteer. That's what it means to **LIVE UNITED®**.

## Relationship Management A Competency

As you take on a new role in the United Way movement, you will begin to ask and address some critical organizational questions, such as the following:

- Are your campaigns declining?
- Are your donors, volunteers and advocates defecting?
- Do you understand what your constituents want from United Way?
- More importantly, are your donors, volunteers and advocates getting what they want? Or, are they turning to another cause instead of United Way?

If you answer “Yes” to any of these questions, then now is the time to invest in a new business strategy to optimize resources, operations and community impact by developing a Relationship Management competency at your United Way.

## Relationship Management in a United Way

When you are truly competent in Relationship Management, you will know more about your constituents. You will treat them differently. They will feel differently about United Way, and they will act differently as a result.

- *What you will know.*  
You will know more about your constituents, such as where they live, where they work, what they care about, their interest in the agenda and their capacity, affinity and propensity to give to United Way.
- *What they will see from United Way.*  
They will see that this is an organization for people/companies/agencies like me. Based on new information captured and understood, United Way will be able to provide programs, products and services that are relevant, and

messaging that is timely, meaningful and motivating.

- *How they will feel.*  
By matching relevant engagements, products and communications to your constituents based on what you know about them, they will have a great experience, feel recognized, appreciated and a part of a social movement that Advances the Common Good.
- *What they will do as a result.*  
Ultimately, your constituents will embrace the organization and will do things like share more data, donate more financial gifts, offer more time towards volunteering and advocate for United Way throughout their company and community.

### Key Components of Relationship Management

A focus on Relationship Management has the following four key components:

- *Formal*  
Through structured approach and documentation around planning, you make it a focus and a priority for your entire organization.
- *Disciplined*  
This disciplined approach emphasizes best practices, planning and accountability to keep you on track.
- *Integrated*  
Relationship Management is everyone's job, requiring cross-functional approaches and a collaborative environment for success.
- *Strategic*  
The approach to Relationship Management is as a business strategy that will alter and enhance the work you do at your United Way to improve the outcomes you seek in your communities.

### Pillars of Relationship Management

The five foundational pillars, defined below, are used to build a Relationship Management competency within your United Way:

- *Organization/Culture*  
Organizational readiness, leadership support and cultural mind-set for adopting Relationship Management and the changes required.
- *Operations/Process*  
Infrastructure and supporting processes required to implement Relationship Management in a systematic and sustainable manner.

- *Data*  
Constituent information and insights required to enhance understanding and enrich engagement.
- *Technology*  
Enabling platform and integrated set of systems to support an automated approach to managing and reporting on customer interactions and data.
- *Engagement*  
Ability to leverage constituent data to make communication and messages more precise and relevant.

### Tools to Help Build Relationship Management

The following is a list of Relationship Management Starter Kit, Templates and Tools:

- *Get the Roadmap Starter Kit*  
The strategic plan for implementing Relationship Management at your United Way. Developed by Clarity Group and local United Ways, the Roadmap provides the strategies, tactics and the how-to templates and tools to transform your organization.
- *Monthly Relationship Management Webinar Series*  
An internal relationship-building opportunity for your entire staff. Packed with case studies and best practices, guest speakers from local United Ways share their stories of successfully implementing Relationship Management.
- *Online Self-Assessment*  
Assess your readiness for Relationship Management with the Online Assessment. Take the survey to identify the areas of greatest opportunity and get initial thought starters to ramp up the transformation at your United Way.
- *Relationship Management Template Certification*  
Delivered via a combination of interactive webinars, homework assignments and consulting from Clarity Group, this 10-week United Way Virtual Learning Series will show you how to get started, how to involve all your staff and provide you the materials and tools to implement Relationship Management at your United Way. Relationship Management Template Certification has been optimized for smaller United Ways and those who are just getting started with Relationship Management.
- *Relationship Management Intensive*  
A fast-paced immersion into Relationship Management, led by Clarity Group, combining teleconference group sessions, an on-site

multi-day workshop and ongoing learning and refinement. Accelerate your impact by providing tangible, hands-on action-learning that focuses on implementing measurable “Quick Win” Relationship Management piloted activities.

- **Relationship Management Learning Circles** Join a peer group and commit to a 12-month collaborative journey in developing Relationship Management at your United Way. Includes on-site consulting from Clarity Group to craft a custom Relationship Management Roadmap and provide hands-on guidance utilizing Clarity Group’s Relationship Management Tools and Templates. You and your cross-functional team will transform your organization, improve your internal communication and operating processes, and see real results in donor retention, constituent engagement and revenue growth.

#### **Leadership Competencies:**

- Creates and sustains mutually positive investor (donor) relationships.
- Recognizes that the United Way is a consumer brand and continually manages the brand as a strategic asset.
- Communicates a clear, compelling United Way message that is consistent with the mission.

## **Key Terms**

**Brand** A brand is a relationship. It is status earned by becoming significant in the lives of its users. It is a combination of tangible and intangible attributes, symbolized in a trademark, which, if managed properly, creates value and influence.

**Brand Strategy** The series of accumulated experiences people have with United Way that includes images, ideas, values and behavior that define who United Way is and why United Way is different.

**Constituent** A wide range of stakeholders benefiting from the focus on Relationship Management by United Way, including donors, volunteers, advocates, agencies and other key community partners.

**LIVE UNITED®** In 2008, UWW introduced the **LIVE UNITED®** brand advertising campaign, an invitation to advance the common good the United Way, by focusing on EIH.

**Market Segment** A group of customers who share the same needs and values, who can be expected to respond in much the same way to your product or service and command enough resources to be of strategic importance to your organization.

**Target Audience** The segment of a population to which marketing communications are directed, guided by the question: Upon whom does your United Way’s future and mission depend?







# Developing Resources for Community Change

## Donor Support to Achieve Community Change

United Way fund-raising will drive Community Change in EIH and donor interest in and commitment to Community Change in EIH will drive fund-raising.

The work of improving communities in the areas of health, education and financial stability requires significant and sustained financial support from a wide range of constituents in the community. United Way looks outward to recruit and mobilize people throughout the community to personally join with it to advance the common good through the building blocks of EIH.

Much of this recruitment and engagement will come through workforce campaigns, United Way's traditional method of raising funds. Workforce campaigns will serve not only as a channel to raise dollars, but also as a vehicle to reach, communicate with, educate and inspire current and perspective donors, both corporate and employee.

United Ways are increasingly diversifying and generating funds from other sources. For example, United Ways are:

- Reaching out directly to individuals, both current donors and non-donors. They are focused specifically on recruiting new donors, recovering lapsed donors, and retaining and growing current donors.
- Identifying and cultivating Leadership (\$1,000-plus annually) donors and Tocqueville Society (\$10,000-plus annually) donors, an increasingly important part of the donor base.
- Nurturing affinity programs particularly Women's Leadership Councils and Young Leaders.
- Identifying and cultivating long-time loyal contributors to retain, engage and optimize their lifetime value as donors.
- Expanding relationships with foundations and other organizations that can help fund work in EIH.
- Making a sustained commitment to build endowments and planned giving programs.

## Current trends in fund-raising at United Way and the non-profit community

There are a number of long-term trends at United Ways across the system and in philanthropy in general. Understanding these trends will help you understand where your United Way places in its resources:

- Campaign revenue is, by far, the largest source of United Way's revenue. In 2009, it generated \$3.4 billion, representing 90 per cent of current year support, according to the 2009 Database II Survey.
- As more United Ways have become focused on strategically directing resources to advance goals related to EIH, "pass-through" designations, which are gifts given to other non-profits through the United Way campaign, have declined and more resources have been available to United Ways for strategic allocation. United Ways that actively promote Impact Areas perform better.
- United Way Public Opinion Poll data from 2009 shows when the general public sees United Way making a difference in two-or-more of the three key focus areas of EIH, trust and donations increase:
  - Trust in United Way increases from 71 per cent to 90 per cent.
  - Incidence of donations increases from 18 per cent to 28 per cent.
- Affinity groups outperform system growth.
- Major gifts represent 13 per cent of current year support and experienced a slight increase in revenue this year.
- United Ways with planned giving programs outperform those without planned giving programs. Also, donors who make a planned gift often increase their annual giving faster than those without one.
- The world of individual and corporate philanthropy has changed and so has the traditional workplace. Many more individuals enjoy flexible work options, such as telecommuting, which means more employees are not physically present in the workplace. They may be spread out over the country or even the world (Department of Labor "Future Works," *Fortune 500*). This may make it more difficult to engage employees

in person on company campuses. It means both the company and United Way may need to rely on technology to engage and build the relationship (one reason for the shift to “workforce,” not just workplace).

- Individuals increasingly have been attracted to “causes” that invite them to not only give, but also provide opportunities to volunteer and be an advocate or champion of their causes. Many of these causes have an ongoing engagement with the individuals to connect them to the issues they care about. With United Ways’ EIH focus areas, as well as national cause campaigns like Campaign for the Common Good and Volunteer Readers, United Way now has issues and causes that individuals can connect to more specifically than general community support.
- Corporate sponsorships and cause marketing revenue have grown dramatically in the United Way system, outpacing overall campaign growth by percentage: 2010 projected revenue: \$11,230,107 vs. \$10,209,188 in 2009. Although the United Way system has been successful, it also has been slow to invest resources in personnel and staff training and has faced challenges providing enough perceived value for corporate partnerships.
- United Ways need to build an individual relationship and communicate with donors. Donors want to be thanked and informed about the impact of their gift.

### Leadership Competencies:

- Has the ability to reach outward to engage the community, mobilizing corporations, organizations and individuals to engage them in real community change and involve them as donor, volunteers and advocates.
- Creates and sustains a relationship-oriented culture, impacting all facets of fund-raising, hiring and training, collaboration and donor cultivation
- Engages and energizes the board to be bold and take the actions necessary to fund and lead significant community change
- Engages corporations, organizations and individuals to learn of their interests and philanthropic goals and frames strategies as products that they can invest in.

## Key Terms

**Enhanced Workforce Campaign** Annual campaign re-designed to broaden and expand United Way’s fund-raising efforts by focusing on building personal donor relationships, recognizing that the traditional workplace is now the workforce with many employees working remotely, and understanding the new fund-raising environment.

**Global Corporate Leadership** GCL is a UWW Team that, working with United Ways, manages large national/multi-national accounts to increase philanthropic interests.

**Loyal Contributors** United Way donors who have given to any United Way for ten years or longer. These loyal, consistent donors are critical because they tend to give more and have tremendous potential for total lifetime giving, including United Way in their will or estate plans.

**Principal Gifts** Gifts from \$100,000 to \$1,000,000 made by individuals who invest in United Way products, which are strategies that advance United Ways’ work in EIH that match the philanthropic interests of donors.

**Tocqueville Society** United Way donors who give at least \$10,000 annually. These donors are often community leaders who have influence, contacts and passion for the community and United Way’s goals to improve the community.





# Operational Excellence

The image of United Way in the community is often determined by the professionalism of the operation. No matter how big or small, sound business practices are a must. Take seriously your responsibility to provide excellent customer service, follow standards of financial accountability, provide easy access to all public information and establish an atmosphere of trust. Avoid obstacles that could jeopardize your job or deter you from your mission. When you first take on your new position, be sure that your audit is up-to-date and that you are not left with someone else’s problems. UWW membership requirements set out some basic steps to follow. When all of these are in place, look for ways to be even more efficient and effective. The Standards of Excellence will provide help in achieving a higher standard of performance

Another task is to confirm your United Way’s compliance with the UWW membership requirements. Trust, but verify, that your organization has the necessary policies, practices and procedures in place. Visit the CFO Deskbook on United Way Online (<http://online.unitedway.org/cfodeskbook>) for detailed guidance on the requirements. You may be faced with some tough decisions between wanting a more visible role for the United Way in the community and keeping administrative costs low. This is not an either-or decision. Whether you have a one person office or multiple staff members, managing time and resources is always a challenge. Look for ways to leverage community resources to be more effective.

The new executive is often expected to ratchet up the organization, make changes, put in place new policies and procedures, streamline processes and show strong management skills. This is a great opportunity to enlist the assistance of your top leadership and select individuals to assist with strategic planning. Be open to consolidating back-room operations with another United Way to cut costs and simplify processes. Be true to the values of your organization that set the behavior for the way you relate to each other and your community.

When asking for resources or comparing your United Way to others, you will be asked your Metro Size. See the chart presented below

**Exhibit 1. Categories of United Ways**

Metro Size	Dollar Amount Raised	Metro Size	Dollar Amount Raised
IC	\$25,000,000 and more	VI	\$500,000 - \$749,999
IB	\$15,000,000 - \$24,999,999	VII	\$200,000 - \$499,999
IA	\$9,000,000 - \$14,999,999	VIII	\$100,000 - \$199,999
II	\$4,000,000 - \$8,999,999	IX	\$50,000 - \$99,999
III	\$2,000,000 - \$3,999,999	X	\$25,000 - \$49,999
IV	\$1,000,000 - \$1,999,999	XI	\$ less than \$25,000
V	\$750,000 - \$999,999		

Note: A United Way that raises less than \$1Million, Metro V and smaller, is in the Small Cities category.

At all times align your operations around the mission. You will hear alignment often as you become savvy to United Way terms. Don't think that it is just for the larger United Ways. Having volunteers, staff and your business plan focused on your mission will eliminate unnecessary work and achieve better results.

Performance planning is a principle for you and your Chief Volunteer Officer to work on together to achieve maximum results. Agree on the key responsibilities of the job description and the major objectives to be achieved within an agreed-upon timeframe. Establish who will be part of your performance review. The CEO takes the lead in seeing that the review takes place at least annually with periodic check points to provide feedback throughout the year.

The CEO prepares a status report of the major objectives for discussion at the time of the review with the determined volunteers. Examples of job descriptions and work plans are available from UWW's Talent Management area.

## Leadership Competencies:

- Ability to plan wisely and lead an organization aligned around its mission.
- Ability to read and understand financial records and develop a budget.
- Commitment to timely, accurate reporting with checks and balances.
- Ability to provide oversight of day-to-day operations with excellent customer service requirements.
- Ability to develop and maintain all operational procedures and look for ways to be more effective and efficient.
- Note: All elements of accountability are available in Component 5: *Operations of the UWW Standards of Excellence*. Select the areas most essential to your operation.

## Key Terms

**Audit** An examination and verification of your United Way's financial records and supporting documents by a certified public accountant.

**Back Office** Functions that provide operational support of your United Way's business activities, for example, finance, human resources, technology and purchasing.

**Business Plan** A written document that describes your United Way's objectives over a specific period of time and identifies the resource development, marketing, financial and operational activities required.

**Bylaws** Rules and regulations adopted for your United Way's internal governance. The bylaws empower the Board of Directors.

**Code of Ethics** A written system of standards for ethical conduct. A workplace guide to support day-to-day decision making.

**Disaster Readiness and Business Continuity Plan** A plan that identifies the role of United Way during a community crisis and provides steps to minimize the effects of an interruption to your United Way's operations in the event of a disaster or other disruption to normal business operations.

**GiftLink** A database of local United Ways and their zip codes.

**In-kind Contributions** A contribution of goods or services rather than cash or appreciated property.

**Strategic Planning** The process of evaluating environmental trends and organizational strengths and weaknesses to determine United Way's primary direction and objectives. Also includes setting a course of action designed to achieve these objectives.

**Transparency** Openness and candor about United Way governance and operations. Transparency is required to build trust with donor/investors, partners and the general public.

**Values** Traits or qualities that are considered worthwhile. They represent your United Way's governing beliefs that drive decisions and define how people behave toward each other.





# United Way Executive Development

Whether you have been an executive with United Way or another organization, continuous learning is the key to capturing strategic opportunities, as well as addressing issues and challenges inherent in navigating change and improving organizational performance as with any business, United Way executives need to anticipate shifts in the environmental landscape and position United Way in a proactive manner, assuring the alignment with the system's strategic imperatives. To achieve greater community impact in the focus areas of Education, Income and Health (EIH), the strategic imperatives are to advance the Common Good in EIH by increasing individual engagement (bringing **LIVE UNITED®** to life) and driving growth in revenue and resources.

Within this context, the new United Way executive is expected to hit the ground running, demonstrating the ability to focus actions and target results. There is a learning curve inherent in your new executive role that naturally requires some on-the-job lessons that can not be avoided. In fact, learning by experience to inform appropriate actions is sometimes the best teacher. One of the keys to your success is creating an executive development plan to enhance your competencies in your role as president. Such a strategy starts with you. It is also necessary to model this practice within your organization. In addition to local resources, one of the values of being a part of UWW is having access to a variety of development opportunities and resources, many of which are covered in this Quickstart Guide for New United Way Executive Officers.

Conduct a personal assessment by using the emerging competencies required of executives to lead community mobilization focused on achieving results and greater impact in the areas of EIH. The chart below addresses the question: What are the competencies and on-the-job actions and behaviors needed to support community mobilization to drive EIH results at the local United Way level?

## Four Categories of CEO Competencies

This is a sample list of CEO core competencies that you may consider when designing a job description, creating a development plan or planning a CEO performance review. Four categories of CEO competencies are as follows:

- Engage community and provide leadership
- Build relationships and develop resources linked to EIH impact strategies
- Demonstrate business acumen and achieve alignment and drive execution
- Model exemplary values and personal attributes

### Exhibit 2. Description of CEO Competencies

Core Competency	Traits	Actions
<b>Engage community and provide leadership</b>	Change leader and effective communicator	Champions change, demonstrates a willingness and ability to initiate, sponsor, and lead mission-focused change within the organization and community. Communicates effectively with diverse stakeholders, identifies, analyzes, organizes and addresses issues in a timely, effective manner using data and input to make sound, decisions even in the face of uncertainty.
	Community mobilizer, visionary and strategic thinker	Works in partnership with diverse community stakeholders to create a vision that captures the minds and energizes others to commit to such a vision. Thinks long term, stretching horizons and challenging imaginations to develop an image of how the United Way, together with its partners and individuals, can leverage greater impact in EIH within the community.
	Board development and leadership	Works well with board leadership and builds and manages productive relationships needed to assist the board in carrying out its fiduciary and strategic governance role. Operates within the paradox of being led as well as the requirement of providing leadership.
	Team and talent development	Fosters teamwork and builds the leadership team. Develops talent by coaching, mentoring and advising; challenges others to improve; addresses performance problems and grooms executive staff for advancement. Drives performance by establishing clear outcomes with accountabilities and delegates effectively, ensuring that team tasks are completed.

<b>Build relations and develop resources linked to EIH impact strategies</b>	Effective relationship builder influence and political astuteness	Builds effective relationships and works with diverse individuals and groups using impact and influence strategies that appeal to reason, values or emotion to generate enthusiasm for the work. Coalition builder, who explains, advocates and articulates facts and ideas in a persuasive manner and to negotiate with individuals and groups both internally and externally. Uses political awareness to determine how best and the ethical way to get things done.
	Resource generation and investor relationship management	Creates and sustains mutually positive investor relationships; works to foster mutually-beneficial relationships that add value to bottom-line financial results. Effective at developing and executing diversified strategies for increasing financial resources.
	EIH impact strategies and product innovation	Identifies innovative strategies that address community concerns, creates products to address strategies and measures impact.
	Issue advocacy	Mobilizes action on behalf of issues that matter to advancing the agenda relative to strategies related to EIH.
<b>Demonstrate business acumen, achieve alignment and drive execution</b>	Strategic alignment and operational management	Sets strategic goals with the board and develops objectives and strategies for meeting goals and anticipating obstacles. Allocates resources according to priorities, aligning talent and financial resources efficiently to accomplish organizational outcomes. Together with leadership team prepares, justifies and administers the organization's board approved budget. Plans, administers and monitors expenditures to ensure cost-effective operations; assesses financial condition of the organization. Manages the organization's technology assets, uses long- and short-range planning to budget for and select technology, and makes the best use of the organization's computer technology.
	Strategic communications	Aligns messages about United Way's value proposition and builds greater public will to act. Develops innovative ways to leverage corporate and media partnerships to generate more visibility and awareness of EIH work and its impact.
<b>Model exemplary values and traits</b>	Results-oriented	Energized and excited by challenging objectives and a concern for exceeding goals set by self or others; Focuses on results and achieves high level, sustainable performance.
	Integrity	Consistently honors commitments and takes responsibility for actions and words, demonstrating the highest ethical behavior.
	Flexibility	Demonstrates adaptability and openness to alternative solutions and flexibility when interacting with others, understanding their attitudes, needs, interests and perspectives.
	Continuous learning and self mastery	Develops and applies skills and capabilities by continual on-the-job learning; learns quickly when facing new challenges; continually focuses on personal development and growth.
	Inclusiveness	Networks and partners with diverse stakeholders, including broad representation of private/public, traditional and non-traditional community organizations.

## Formulating a CEO Development Plan

The following steps are a sample of what you may want to do with your development plan system:

- Column 1: The CEO will choose one organizational objective to focus on and list it here. This objective may be determined by the strategic plan approved by the board.
- Column 2: The CEO will specifically share the action that he/she plans to take in the following year to support or reach the organizational objective.
- Column 3: The CEO indicates the date by which the action will be completed
- Column 4: The CEO lists the specific measurable outcome(s) that will occur as a result of the action taken.
- Column 5: The CEO will list how he/she plans to communicate progress on the work plan. This update can be most effective if done quarterly. This way the CEO can request alterations or additional tools or assistance from the board to reach the goal. The update might include:
  - The actions taken to date
  - What actions are left to be taken
  - Progress and/or challenges that were unexpected
  - Status of what is left to be done

**Exhibit 3. Example of CEO Development Plan, presented below provides an example of a development plan.**

<b>Exhibit 3. Example of CEO Development Plan</b>				
<b>Core Competency:</b> <i>List one objective or core competency that you intend to pursue or improve.</i>	<b>CEO Actions to Develop the Objective or Core Competency You Listed:</b> <i>Name the training or development activity that you will participate in, who offers it and when it takes place.</i>	<b>Date to be Completed by:</b> <i>Mark the date by which you will complete the action.</i>	<b>Specific Measurable Outcome(s):</b> <i>List the specific measurable outcome that you hope to attain by investing time in this action.</i>	<b>Board Meeting Dates CEO Will Present a Progress Update on Development Plan Actions:</b> <i>List the bi-annual board meeting date when you will give a progress update on your CEO Work Plan actions.</i>
<b>Objective:</b> To change Leadership	Attend executive development session focused on Change Leadership for CEOs, Offered by UWW at Staff Leaders' Conference, May 2010	May 2010	To vet change strategies related to the redesign of our community investment process with two stakeholder groups and gain support for moving the strategies forward.	December 2010
Core Competency:	Action: Offered by What Organization When:	Completion Date:	Measurable outcomes:	Board Meeting Date:





# Important Contacts and Information

## I. People to Know

*Include, but not limited to, the following:*

- Chamber of Commerce
- Civic group leaders
- Committee chairs
- Corporate and business leaders
- Executives of neighboring and state United Ways
- Faith-based community leaders
- Foundation leaders
- Leaders in minority communities
- Local government leaders
- Major donors
- Media contacts
- Members of your Board of Directors
- Partner agency directors
- Partner collaborators
- Representatives and political leaders
- 2-1-1 Director for your area
- State organization executive/local leader

## II. Critical Documents

*Know location and contents of:*

- Agency/partners allocations
- Annual audit/management letters
- Annual reports
- Board minutes
- Bylaws
- Conflict of Interest statements
- Contracts
- Disaster and Crisis Readiness Plan
- Diversity policy
- Federal tax-exempt letter/number
- Fund distribution policies
- Human Resources/employee records
- Incorporation papers
- Insurance policies
- Leases/deeds
- Non-discrimination policies
- Operating budget
- Policies and procedures
- Risk management policies

- State registration
- Strategic plan
- Tax forms (990, City, State, Federal)
- UWW Membership Requirements and Toolkit
- UWW Standards of Excellence

## III. Current Policies

### Accounting:

- Accounts payable/receivable
- Administrative fees
- Agency allocations policies and procedures
- Agency/partner allocations cycle
- Back-up and off-site storage of documents
- Bank accounts (all investments)
- Credit cards
- Investment policies
- Overhead calculations
- Payroll records
- Policies regarding travel and expense reimbursement
- Purchasing agreements
- Retirement benefit plans
- Reserves policies and investments
- Transfer policies and fees

### Resource Development:

- Campaign structure and organization
- Campaign timetable
- Campaign training
- Campaign volunteer structure
- Combined Federal Campaign documents
- Designation policies and process
- Important dates: Kickoff/Division kickoffs/report meetings/targets
- State employee campaign documents
- Volunteer recognition

### Investment Relations with Community

#### Partners:

- Agency agreements and contracts for service
- Communication strategies with partners and collaborators
- Investment policies/review timetable

- Meeting schedule with community partners
- Venture grants and other one time contracts

#### **Office Procedures:**

- Procedures for staff communications at all times
- Security codes/keys
- Staff and key volunteer emergency numbers (with copies off premises)

#### **Human Resources:**

- Employee hiring policies
- Employee records and evaluations
- Employee salary records

## **IV. Organization History and Culture**

- Annual reports/news clippings
- Current and present volunteer leadership/selection criteria
- Documentation of previous milestones
- Informal statements regarding image and community role
- Needs Assessments/Strategic Plans/Community Reports/Campaign Analyses
- Previous records of staff and executive leadership
- United Way system history “Grassroots Initiatives Shape an International Movement”
- Values Statements and Implementation Strategies

## **V. Business and Community Climate**

- Chamber of Commerce reports
- City/County demographics and projections
- Community business journals
- Economic reports and trends
- Real estate projections
- State surveys and funding projects
- UWW research and comparisons



## Checklist for 30-60-90 Day Action Plan *Continued*

- Develop a year-round calendar of resource development activities, media events and community impact meetings. Know about deadlines for UWW reports, board related activities and registering for conferences. Plan ahead as much as possible. Focus on what is important.

### Establish Leadership – External

- Ask the chair of your board of directors or another officer to recommend ways for you to meet people of influence. Develop a media plan that gets you in the public eye. Plan to be at functions where you can meet donors throughout the community. Prepare to spend long hours at work during this learning curve.
- Meet with your largest accounts, leadership and major gift chairs and community impact leaders, including partner agency executives. During these meetings, you can do the following:
  - Use this opportunity to introduce yourself, give a little background and your aspirations for the job
  - Thank the company leader/individual/agency executive for their role in the success of the United Way
  - Review their results (do your homework). Ask if there are ways United Way can help to grow their involvement
  - Ask them to tell you any roadblocks to greater involvement/success. Listen.
  - Focus your remarks, prepare in advance, and do not take more time than requested, for example a half-hour.
  - These meetings are also successful in a group setting. Breakfast with the new United Way president

### Leadership Tips and Tools

- Become knowledgeable about UWW membership requirements (<http://online.unitedway.org/site/soe/cafe/index.cfm?ppid=1036>). Make sure your organization is a member in good standing with UWW.
- Learn about Flex Credits (<http://online.unitedway.org/flexcredits>) and other benefits of membership. Be sure you are updated on UWW and your local United Way website. Read the daily Breakfast online e-mail. Check out and register for ListServes, including the one that matches your metro size (<http://online.unitedway.org/listserv>).
- Check out the UWW Learning Opportunities Catalog (<http://online.unitedway.org/catalog>) and make plans to attend training as soon as possible. Key training includes the New Presidents Forum and United Way Overview.
- Find a mentor. Research the UWW Online Mentor/Scout program (<http://online.unitedway.org/site/vopenfile.cfm?fid=3051882>). When attending United Way meetings, listen to someone with whom you connect. Establish a network. Ask experienced CEOs for advice on time management and setting of priorities.
- Become familiar with acronyms relative to relationships, for example, GCL companies, NPC, and CFC. and national media themes such as **LIVE UNITED®**. Also learn about your local United Way identifiers such as LE, CI, RD. Know your metro size. Learn where to find information online that answers your basic questions. Refer to Helpful United Way Worldwide Information below as a starting point.
- Time permitting, utilize webinars, chat rooms, list serves, blogs and online resources such as the Knowledge Café (<http://online.unitedway.org/site/soe/cafe/about.cfm>) to learn best practices and to obtain a broad view of what works. You can get some great examples online of what works with supporting forms, charts and procedures from other United Ways.
- If you are new to United Way, visit other United Ways in close proximity and learn the culture. When you plan a vacation, see if there is a United Way in town and visit it.
- Understand that volunteer management, which is the ability to lead and be led by volunteers, and board development/management are keys to running a successful United Way.
- Develop a year-round calendar of resource development activities, media events and community impact meetings. Know about deadlines for UWW reports, board related activities and registering for conferences. Plan ahead as much as possible. Focus on what is important.

















# List of Key Terms for United Way System and Organizations

For a more complete list, go to:

<http://www.unitedway.org/worldwide/whatis/glossary.cfm?MID=41>

## **Accountability**

The United Way owes its success and even its existence to its stakeholders. They include, for example, staff, board members, donors, volunteers, funding recipients and partners. United Way takes trust seriously and knows that trust must be earned. Therefore, United Way holds itself accountable to its stakeholders. It takes steps to ensure that all of its practices are legal and ethical. It carefully stewards its resources; thereby demonstrating integrity in everything it does. United Way makes all of its decisions with the mission and the public trust in mind.

## **Administrative Back Office**

Basic operational support functions required of any organization, regardless of the nature of the operation, for example, human resources administration, finance, information technology or procurement, which may be prime candidates for outsourcing or centralization.

## **Advancing the Common Good/LIVE UNITED®**

United Way's work is focused on the building blocks for a good life described as follows:

- **Education** – Helping children and youth achieve their potential
- **Income** – Promoting financial stability and independence
- **Health** – Improving people's health

Advancing the common good is less about helping one person at a time and more about changing systems to help all. We are all connected and interdependent. We all win when a child succeeds in school, when families are financially stable, when people are healthy. United Way's goal is to create long-lasting changes by addressing the underlying causes of these problems. Living united means being a part of the change. It takes everyone in the community working together to create a brighter future. Give. Advocate. Volunteer. LIVE UNITED®.

## **Advocacy**

Efforts to influence public opinion or policy through various forms of persuasive communication to key audiences, including government, individuals, corporations, non-profit organizations, or the general public.

## **Allocations**

The United Way allocations process determines how to distribute resources raised among eligible community organizations. This is a transparent, and ideally volunteer-driven, process. Once the United Way's community impact focus areas are identified, the typical allocations process can follow. First, a volunteer allocations committee convenes, which is composed of people who have knowledge and experience with United Way and/or community programs. They develop that year's funding criteria and invite community organizations to apply for funding. Based on selection criteria that are shared with all parties, they select the proposals that will win funding that year.

## **Audit**

An examination and verification of the organization's financial records and supporting documents by a qualified individual or group that is completely independent of the organization, usually done by a public accountant. The auditor is provided with all the necessary information to deliver a fair and impartial evaluation of the organization's financial practices and reports.

## **Board Chair/Chief Volunteer Officer (CVO)**

The CVO provides leadership to the volunteer board of directors in fulfilling its responsibilities for governance, acts as spokesperson for the board, presides over board meetings, motivates and holds the board accountable, and provides supervisory contact for the United Way CEO.

**Board of Directors/Trustees/Governors**

A group of respected individuals who govern the not-for-profit organization and have ultimate responsibility for its integrity and effectiveness. They serve as volunteers, which means giving their time and expertise without pay. They represent many parts of the community, for example, business, government, citizens and academia. Board members have a legal and moral obligation to educate themselves about the affairs of the organization, to know the financial situation, to set strategic direction and to take responsibility for the organization's development.

**Brand**

A brand is essentially a relationship. It is a collection of interactions that make up the sum of one's experience with an organization or a product. The United Way name and logo – brand identity or trademark – are the external symbols of the brand, which expresses the value of United Way to its community; the promise of excellence.

**Bylaws**

Formal rules and regulations adopted for the organization's internal governance.

**Card Value**

CV is last year's total giving. It is the amount that you hope to build as you enter a new campaign.

**Chief Executive Officer**

The CEO reports to the board of directors and is responsible for overseeing the management of the organization and implementing the strategic goals and objectives. With the chair, the CEO enables the board to fulfill its governance function and gives direction and leadership toward the achievement of the organization's philosophy, mission, strategy and its annual goals and objectives.

**Click 'n Give**

A web solution from Truist for capturing online donations.

**Code of Ethics**

A written system of standards for ethical conduct. A workplace guide to support day-to-day decision making.

**Combined Federal Campaign (CFC)**

The CFC is the campaign with federal employees, using specific regulations agreed to by all participants.

**Community Assessment**

An effort undertaken to evaluate and understand the aspirations, issues and current state of affairs in a community. The assessment could include goals, assets, challenges and needs. Also called "Community Needs Assessment" or "Community Profile."

**Community Impact**

A typical definition reads: "Mobilizing communities to create lasting community changes that will improve lives." An important distinction is to make between community impact and community impact model, defined below:

- **Community Impact** is the long-term improvements in community conditions that a United Way and its partners achieve through a community impact model.
- **Community Impact model** consists of the values, strategies, and business model that make these results, this community change, possible.

**Community Impact Plan**

A plan for achieving desired results on a specific issue. It includes desired outcomes, objectives, strategies, action steps, roles and resources needed.

**Community Impact Strategy**

An approach to addressing the root causes of an issue. Also called impact strategy.

**Community Outcomes**

The long-term, sustainable changes in the overall target population, community networks or systems that demonstrate that root causes have been addressed and impact achieved. Also see Outcomes, Program Outcomes.

### **DataLink Database**

United Way Campaign Research Database (<http://online.unitedway.org/site/datalink/menu.cfm>) maintained by the UWW Research Team. All information contained in the reports is based on responses to UWW's Research Services' annual Amount Raised Card Survey and Campaign Summary Survey (Database 2).

### **Designations, Designated Gifts**

A gift that includes a specific restriction made by the donor/investor as to the use of the proceeds. It is usually directed toward a specific agency or cause and must be honored by the recipient. Also referred to as a donor choice gift, restricted gift, or directed gift.

### **Employee Campaign Chair (ECC)**

The ECC is the employee campaign leader in a workplace, sometimes known as the Employee Campaign Manager.

### **Endowment and Planned Giving (EPG)**

The EPG is defined as follows:

- **Endowment:** This is a fund established by the organization to provide sustainable and stable income derived from the investment income of the fund. Typically, the principal (capital) of the fund is not touched except in extraordinary circumstances.
- **Planned Giving:** This is a method of raising substantial gifts from individuals in the form of bequests, life insurance and charitable annuities. These are often, but not always, planned as donations upon the death of the donor. They are also often a way for a donor to make large, tax-beneficial gifts. They almost always qualify as Major Gifts.
- **EPG Program:** A program cultivates planned giving as a natural extension of a lifelong relationship with a donor/investor guided by policies and procedures for the acceptance and management of a variety of planned giving options. United Ways should consider the creation of an endowment to manage planned and other gifts.
- **EPG Toolkit:** A how-to guide for local United Ways interested in starting or enhancing their endowment and planned giving program. The toolkit may be used as a step-by-step guide or a reference guide for specific topics or best practices. (<http://online.unitedway.org/site/soe/cafe/index.cfm?ppid=2093>).

### **Executive Committee**

Officers of the board of directors, which may include committee chairs.

### **Flex Credits**

A membership benefit available to help United Ways pay for learning. Flex credits represent a percentage of a United Way's membership investment or dues that is set aside by UWW. Flex credits are available to United Way professionals and volunteers whose United Way is in full compliance with membership standards and current with dues payments. They can be used to pay for learning programs, conference registration fees and travel expenses. (Flex Credits 101: [https://admin.acrobat.com/\\_a17179333/p42676147/](https://admin.acrobat.com/_a17179333/p42676147/))

### **Generally Accepted Accounting Principles (GAAP)**

GAAP is a widely accepted set of rules, conventions, standards and procedures for reporting financial information, as established by the professional accounting authority in each country.

### **Generally Accepted Auditing Standards (GAAS)**

The GAAS A set of systematic guidelines used by auditors when conducting audits on organizations' finances, ensuring the accuracy, consistency and verifiability of auditors' actions and reports.

### **Gift Link**

GiftLink is a proprietary database of UWW that contains all United Way organizations and their matching zip codes. The database is made available for use in processing workplace campaigns under specific terms and conditions.

### **Global Corporate Leadership (GCL)**

(formerly National Corporate Leadership) – GCL is the UWW leadership with major corporations to involve and increase philanthropic interests. The GCL replaced the NCL.

## **Governance**

The act of setting direction for the organization; ensuring necessary resources, such as human, financial or relationships; and providing oversight of programs, finances, legal compliance and values. The governing board and executive management take very seriously their responsibility to understand the financial and operating practices of the organization. They exercise their fiscal responsibility diligently, understanding that they are accountable to their community.

## **Inclusion**

A strategy to enhance and apply diversity for the benefit of the mission. Diversity always exists in social systems. Inclusion, on the other hand, must be created. In order to leverage diversity, an environment must be created where people feel invited, listened to and supported in contributing to the overall good.

## **In-kind Contribution**

A contribution of goods or services rather than of cash or assets. It is also referred to as Gift In Kind. United Ways use gifts-in-kind in many ways. Typically, they are used to offset some of its operating expenses, for example, the annual financial audit, or to free space for a special event; or to raise non-financial resources for its partner nonprofits, such as food and clothing for a homeless shelter or new computers for small community organizations.

## **Knowledge Café**

A United Way knowledge resource. Its mission is to bring together in one (virtual) place access to the best thinking, lessons learned and promising practices to support community impact work and the ongoing transformation of the United Way system.

## **Leadership Giving**

A recognition level for individuals and families, usually a contribution of \$1,000- or-more annually to United Way.

## **Loaned Executives/LEs**

(also called Loaned Employees, Loaned Representatives - Professionals or staff loaned by their employers for a temporary assignment to a United Way project, typically as account managers during the annual fund-raising campaign.

## **Loyal Contributor Program**

The United Way Loyal Contributor Program recognizes and celebrates individuals who have supported United Way for many years and, in so doing, have had an impact on the lives of many people in their community. Because many of these contributors have given their support through their workplace, the United Way often has not had the opportunity to adequately thank and celebrate them. The United Way Loyal Contributor Program is designed to identify these dedicated contributors and build incredible relationships with them. In doing so, they will want to continue their support of their community through their annual donations. They will also want to be a part of the future of their communities by including United Way in their wills or estate plans. And, they will want to play an active part in the **LIVE UNITED®** movement. (Loyal Contributor Program Toolkit: <http://online.unitedway.org/site/vopenfile.cfm?fid=2972799&noframe=1>)

## **Major Giving**

A major gift is defined as the highest level of financial support of which a high-net-worth (wealthy) individual in that community is capable. Typically, this means that: (a) its magnitude is 10 to 15 times larger (on average) than the average gift the organization usually receives and (b) it has the potential to make considerable impact on the organization's mission.

## **Membership Requirements**

These are specific requirements that each United Way organization must meet and certify compliance with in order to remain a member in good standing of UWW or a national United Way organization. Also referred to as Minimum Membership Requirements.

**Metrics**

Measurement of progress and success. Metrics are based on benchmarks in the community and can include outputs, which are head counts or units of service. They should also include outcomes, which are actual results, that is, lives changed as a result of activities. Resources raised and spent against an issue are also good low-level metrics; however, they need to be linked to outcomes to measure performance.

**Metro Size**

A grouping of United Ways based on dollar amount raised. A United Way raising less than \$1Million, Metro V and smaller, is in the Small Cities category. See Exhibit 1 Categories of United Ways for more detailed information.

**Mission**

The organization's overriding purpose or reason for being. It is what you do, for whom and how it makes the organization different.

**Mobilization Framework**

United Way is in the business of creating community impact, ensuring that people have the basic building blocks for a good life. Mobilizing individuals and institutions to collective action requires ongoing authentic engagement, effective impact strategies and a deep commitment to relationship building. United Way's role in catalyzing social change around EIH can be described as five dimensions of mobilization: Engage with the community to set vision and priorities; Build strategies and focus actions; Mobilize resources; Align and execute on plans and strategies; and Measure, evaluate, adjust, communicate. Embedded within these dimensions are the imperatives of revenue growth and ongoing individual engagement that are both results and underpinnings of successful mobilization.

**National Professional Council (NPC)**

The NPC is organized as a staff forum. It serves as a national leadership body for a movement of nearly 1,300 U.S. member United Way organizations whose shared mission is to improve people's lives by mobilizing the caring power of communities. The NPC membership consists of approximately 60 chief professional officers from United Ways in good standing with UWW. Its members are selected by the NPC Nominating Committee, appointed by the UWW president, or serve in an ex-officio capacity by virtue of position, such as CEO or Chair of United Way of Canada, United Way Retirees Association and Council of State Associations.

**Non-Profit**

United Way organizations are incorporated and registered with the government, like a business. Like all non-profits they do not seek to make a profit from their income. Instead, their mission is to use all of their resources and activities to improve peoples' lives. Different non-profit organizations exist for different purposes, supporting education, health and other community needs. These organizations can also be referred to as: charities, a nonprofit, a not-for-profit, non-governmental, community-based organization, or voluntary organization.

**Outcome**

The result that a United Way seeks to achieve. This is a specified benefit or change that a deliberate action is intended to create for a defined set of people. Outcomes may be defined at multiple levels, for example, program, system and community. See Community Outcomes, Program Outcomes.

**Partner**

Individuals and organizations with whom United Way works to achieve community impact. Generally used when referring to entities who are not investors or donors, but who are providing something else, such as programs, expertise, technology, connections or contacts. It includes, but is not limited to, those traditionally referred to as partner agencies.

**Reserves**

Funds set aside for emergencies or other future needs.

**Stakeholder**

Any person or group who has an interest, either directly or indirectly, in the activities of a United Way organization. This can include, but is not limited to, donors, volunteers, recipients of help, partner organizations, members of the government and other community organizations. Specific stakeholders may vary from situation to situation.

**Standards of Excellence (SOE)**

The SOE define what it means to be a great United Way. They provide guidance for United Way and the United Way system to become more effective in creating impact and improving lives in communities. They establish inspirational benchmarks to assess individual United Way and system performance. In addition, they provide a common language to describe United Way's business.

**State Employee Charitable Campaign (SECC)**

The SECC takes place with state employees using specific regulations agreed to by all participants.

**State Organizations/Associations/Council of State Associations**

COS is a staffed organization or loosely knit federation of United Way executives. They work to support state public policy issues and state campaigns, and to provide training, consultation, peer networks and other resources to individual United Ways.

**Strategic Plan**

A written document that identifies a set of integrated decisions a United Way has made with respect to multi-year goals and strategies to achieve them. Decisions include: selected priority issues on which the United Way will focus, target market and donor/investor segments, and resources and operational capabilities needed.

**System Citizenship**

The collective rights, privileges and responsibilities of membership in a United Way system.

**Tocqueville**

The Tocqueville Society recognizes individuals who contribute \$10,000, \$100,000, \$1 million-and-beyond. The name of the Society was chosen because of Alexis de Tocqueville's admiration for the American Spirit of voluntary association and voluntary effort for the community good.

**Truist**

In July 2008, CreateHope and United eWay joined collaborative forces and created Truist. The merger was a direct response to clear market demand for an integrated, strategic approach to philanthropy program administration addressing the full supply chain of giving, from donor to recipient. The combined company, with offices in New York and Washington, DC, powers the planning, tracking and management of global employee and community involvement initiatives. Truist offers support services to meet local United Way needs such as Click & Give and Volunteer Solutions.

**United Way Movement**

A worldwide movement of nearly 4,000 community-based United Ways in 46 countries and territories. United Way organizations advance the common good, creating opportunities for a better life for all by focusing on EIH. The United Way movement mobilizes millions to action: To Give, Advocate and Volunteer and To improve the conditions in which they live.

**United Way Retirees Association (UWRA)**

The UWRA is a voluntary membership organization of about 550 people composed of current and former United Way staff. It is a resource for the United Way system. Membership in UWRA is about tenure in and commitment to the United Way movement and leveraging member's talent and expertise to promote and provide programs that strengthen United Way. In addition to advocacy activities, services offered include help in the areas of endowment and planned giving, mentoring, community impact, interim assistance, disaster relief and retirement planning.

## **United Ways**

A United Way is a volunteer-led non-profit organization that leads, supports and participates in collective, inclusive community efforts that build capacity and mobilize resources to improve lives and create positive, long-term social change in local communities. United Ways encourage and promote philanthropy and volunteerism, and are accountable to donors for how they use contributions and to the community for the results they achieve.

## **United Way Worldwide (UWW)**

UWW is a non-profit organization that provides leadership and services to a network of member United Ways, donors and partner organizations in the United States and around the world. Ways in which UWW leads the movement include public relations, brand advertising, the National Football League partnership, and the management of relationships with global corporate and philanthropic partners and the federal government. UWW support services to local United Ways include training, consultation, conferencing, brand presentation resources, films and videos, research and assessment, and outcome measurement tools.

## **Vision**

A statement about what the United Way ultimately wants to have happen as a result of its efforts and what it will become in the future. For example, UWW's vision statement is: *United Way envisions a world where all individuals and families achieve their human potential through education, income stability and healthy lives.*

## **Volunteer**

A volunteer is a person who gives of his or her time freely, and without pay, to a community service organization or initiative. Volunteerism is at the heart of the United Way model, based on the fundamental principle that “together we can do more than any one of us can do alone.” Although a well-run organization does need employees, engaging volunteers is an important way to stay directly connected to the community. Building a culture of community service – beyond support to one’s family, religious group, tribe or other affiliation – is a strategic imperative for many United Way organizations around the world. United Way volunteers provide the following services:

- Govern the organization through the board of directors.
- Participate in United Way work groups and committees, for example, to develop community impact plans or to help plan and run fund-raising campaigns.
- Work for the United Way itself, helping the paid staff to accomplish initiatives or keep the organization running.
- Contribute to community service program or activities organized by the United Way.

## **Volunteer Solutions**

An online volunteer recruitment resource offered through Truist.

## **Workplace Campaign**

In a workplace campaign, the leaders of a business invite United Way to bring their employees together, tell them about their work in the community, and engage them in giving and volunteering through United Way.



# 'Go to' Information at United Way Online

The chart presented below provides a list of subjects or topics and where to find them at United Way Online. Please note that these are constantly being updated.

<b>United Way Online: <a href="http://online.unitedway.org">http://online.unitedway.org</a></b>	
<b>Subject</b>	<b>Where to go to find it online</b>
<b>2-1-1</b>	<a href="http://online.unitedway.org/211">http://online.unitedway.org/211</a>
<b>Board of Directors' Responsibilities:</b> 1. Board Source 2. Ten Basic Responsibilities of Non-Profit Boards by Richard T. Ingram. Available through Boardsource.	<a href="http://www.boardsource.org">www.boardsource.org</a>
<b>Brand Management</b> Research on the brand along with downloadable templates, e.g., brochures, posters, brandmark	<a href="http://online.unitedway.org/brand">http://online.unitedway.org/brand</a>
<b>Campaign Questions:</b> UWW Community Campaign	<a href="http://online.unitedway.org/site/uwaservices/teampage.cfm?AID=31">http://online.unitedway.org/site/uwaservices/teampage.cfm?AID=31</a>
<b>Center for Community Leadership Learning Opportunities Catalog</b>	<a href="http://online.unitedway.org/catalog">http://online.unitedway.org/catalog</a>
<b>CFO Deskbook</b>	<a href="http://online.unitedway.org/cfo_deskbook">http://online.unitedway.org/cfo_deskbook</a>
<b>Code of Ethics Preparation</b>	<a href="http://online.unitedway.org/site/soe/cafe/index.cfm?topicid=202">http://online.unitedway.org/site/soe/cafe/index.cfm?topicid=202</a>
<b>Crisis Preparedness, Response &amp; Recovery</b>	<a href="http://online.unitedway.org/crisis">http://online.unitedway.org/crisis</a>
<b>Early Childhood/Success By 6®</b>	<a href="http://online.unitedway.org/sb6">http://online.unitedway.org/sb6</a>
<b>Flexible Credits</b> Percentage of your United Way's membership investment that is set aside for expenses related to learning opportunities	<a href="http://online.unitedway.org/flexcredits">http://online.unitedway.org/flexcredits</a>
<b>GiftLink Zip Codes</b> United Way service/solicitation territory	<a href="http://online.unitedway.org/zipcodes">http://online.unitedway.org/zipcodes</a>
<b>Global Corporate Leadership</b> Corporate Profiles and Campaign Results	<a href="http://online.unitedway.org/ncl">http://online.unitedway.org/ncl</a>
<b>Media Strategy and Sample Press Releases</b>	<a href="http://online.unitedway.org/site/uwaservices/teampage.cfm?aid=3894">http://online.unitedway.org/site/uwaservices/teampage.cfm?aid=3894</a>

<b>Mentoring Resources:</b> United Way Retirees Association	<a href="http://www.uwra.org">www.uwra.org</a>
<b>Opportunities Exchange/Job Postings</b> Career Development	<a href="http://online.unitedway.org/oppex">http://online.unitedway.org/oppex</a>
<b>Search United Way Online</b>	<a href="http://online.unitedway.org/site/search/">http://online.unitedway.org/site/search/</a>
<b>Self-Study Web-based Learning Program:</b> Introduction to United Way, an eLearning Program	<a href="http://online.unitedway.org/learning">http://online.unitedway.org/learning</a>
<b>Small Cities Resources: Small Cities</b>	<a href="http://online.unitedway.org/site/uwaservices/teampage.cfm?aid=236">http://online.unitedway.org/site/uwaservices/teampage.cfm?aid=236</a>
<b>Standards of Excellence</b>	<a href="http://online.unitedway.org/soe">http://online.unitedway.org/soe</a>
<b>Standards of Excellence Knowledge Café</b>	<a href="http://online.unitedway.org/cafe">http://online.unitedway.org/cafe</a>
<b>Standards of Excellence Self-Assessment</b>	<a href="http://online.unitedway.org/soe_selfassessment">http://online.unitedway.org/soe_selfassessment</a>
<b>Truist/United eWay Customer Service</b>	<a href="http://online.unitedway.org/site/uwaservices/teampage.cfm?AID=2463">http://online.unitedway.org/site/uwaservices/teampage.cfm?AID=2463</a> <a href="http://www.truist.com/">http://www.truist.com/</a>  <i>Campaign Management Support</i> <i>Employee Users:</i> <a href="mailto:support@unitedeway.org">support@unitedeway.org</a> or 800.255.0418 <i>Administrators:</i> <a href="mailto:truisthelp@seabrooks.com">truisthelp@seabrooks.com</a> or 866.335.3929 <i>Nonprofit Recipients:</i> <a href="mailto:support@unitedeway.org">support@unitedeway.org</a> or 800.255.0418 <i>Technical:</i> <a href="mailto:truisthelp@seabrooks.com">truisthelp@seabrooks.com</a> or 866.335.3929  <i>Volunteer Solutions Support</i> <i>Volunteers:</i> <a href="mailto:truisthelp@seabrooks.com">truisthelp@seabrooks.com</a> or 866.335.3929 <i>Administrators:</i> <a href="mailto:demru@truist.com">demru@truist.com</a> or 212.701.2624 <i>Technical:</i> <a href="mailto:truisthelp@seabrooks.com">truisthelp@seabrooks.com</a>
<b>Truist/United eWay Reports</b>	<a href="http://unitedeway.org/reports">http://unitedeway.org/reports</a>
<b>United Way History:</b> “Grassroots Initiatives Shape an International Movement, United Ways since 1876” by Dick and Mary Lu Aft	<a href="http://www.unitedwaystore.com/product/grassroots_initiatives_shape_an_international_movement/program_film">http://www.unitedwaystore.com/product/grassroots_initiatives_shape_an_international_movement/program_film</a>
<b>United Way International History:</b> “Global Vision and Local Action, the History of United Way International” by Dick and Mary Lu Aft	<a href="http://www.unitedwaystore.com/product/2035/program_film">http://www.unitedwaystore.com/product/2035/program_film</a>
<b>United Way Listservs</b>	<a href="http://online.unitedway.org/listserv">http://online.unitedway.org/listserv</a>

<b>United Way Online:</b> <ul style="list-style-type: none"> <li>• Breakfast Online Subscription – weekday morning e-mail highlighting important news about UWW</li> <li>• Directory of United Ways</li> <li>• Discussion Forums and ListSers</li> <li>• UWW Calendar of Events</li> </ul> United Way Online Users Directory	<a href="http://online.unitedway.org/uwdirectory">http://online.unitedway.org/uwdirectory</a>
<b>United Way Profile Page</b> Directory information on your United Way	<a href="http://online.unitedway.org/orgProfile">http://online.unitedway.org/orgProfile</a>
<b>United Way Public Policy</b>	<a href="http://online.unitedway.org/publicpolicy">http://online.unitedway.org/publicpolicy</a>
<b>UWW Staff Phone List</b>	<a href="http://online.unitedway.org/UWStaff">http://online.unitedway.org/UWStaff</a>
<b>United Way Online Technical Support</b>	<a href="mailto:admin@unitedway.org">admin@unitedway.org</a>
<b>United Ways, State Organizations and Professional Associations</b>	<a href="http://online.unitedway.org/site/uwdirectory/index.cfm">http://online.unitedway.org/site/uwdirectory/index.cfm</a>
<b>United Way Store</b>	<a href="http://www.unitedwaystore.com">www.unitedwaystore.com</a> 800.772.0008
<b>United Way Worldwide</b>	<a href="http://www.liveunited.org">www.liveunited.org</a> 800.892.2757
<b>Where to Turn at UWW</b>	<a href="http://online.unitedway.org/wtt">http://online.unitedway.org/wtt</a>

## Other Helpful Information

Global Corporate Leadership (GCL) Help Desk	<a href="mailto:nclinfo@unitedway.org">nclinfo@unitedway.org</a> 877.625.4630
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