

**United Way of Pierce County
Messaging**

Mission: United Way of Pierce County works from the heart to unite caring people to tackle our community's toughest challenges. We lead, support and invest in community efforts to ensure all our children are prepared to succeed in school and in life.

Vision: A compassionate, vital community where people have the education, resources and opportunities to achieve their potential.

WHY: We believe everyone deserves to have a good life.

HOW: We are unlike other nonprofits. Our unique approach makes a bigger impact and provides bigger return on your investment.

WHAT: We make sure nothing stands in the way of people having a good life so our community can thrive. When our community thrives, we all benefit.

URGENCY: We need you now more than ever. More families are struggling, including many working families. We recently learned that in addition to the 12 percent of people living in poverty, there is another 22 percent struggling to put food on the table or pay their electric bill. That is one in three of us. Giving is down... at a time when our neighbors need our help more than ever.

Detail:

WHY: We believe everyone deserves to have a good life.

- And that people want to be part of the solution.
 - Every day in Pierce County, 31 babies are born. One in six of them are born into poverty where caregivers have to choose between rent or food, heat or medicine, transportation or clothes.
 - In Pierce County, 12 percent of households live in poverty. An additional 22 percent live above the poverty level but still struggle every day to put food on the table or pay their electric bill.

HOW: We unlike other nonprofits. Our approach makes a bigger impact and has a bigger return on your investment.

- **UNIQUELY POSITIONED:** No other nonprofit uses collaboration, systems work, program and initiative funding, corporate and civic partnerships, advocacy, volunteer support, in-kind donations, technical support and direct service to tackle the issues.
- We work in collaboration with many partners in the community. One example of that is our collaborative, a Hunger-Free Pierce County. By partnering with local food banks, the health department, farmer's markets, and others, we are able to tackle hunger from all angles.

- Power Pack – Students who rely on the free and reduced meal plan for food during the week often don't have enough to eat over the weekend. Power Packs provide kid-friendly foods to those children.
 - **DATA:** One in Four children in Pierce County does not get enough to eat each day.
 - **OUTCOME:** United Way provided 4,000 Power Pack weekend meals to students in Pierce County in 2015.
 - **STORY**
- Slow Cooker Program - Realizing that many people do not have adequate equipment to prepare healthy, home-cooked meals, we distributed over 500 crockpots through seven different food programs throughout the county.
 - **DATA**
 - **OUTCOME:** During next two years, this program will provide over 150,000 hot meals to 1,575 residents.
 - **STORY**
- Refrigerated vans - One of the greatest challenges of hunger relief organizations is being able to pick up and drop off healthy food for the community. To solve this issue, we secured three refrigerated vans to be shared by organizations in Pierce County.
 - **OUTCOME:** The Emergency Food Network has created a program with Tacoma-Pierce County Health Department to use one of the vans to pick up leftover prepared foods from hospitals and casinos and bring it to hot meal sites.
 - **OUTCOME:** On the Key Peninsula, one van has been working to drop off food in communities with no access to public transportation or vehicles.
- We take the good work being done in our community and make it do more. One example of that is our Center for Strong Families. By consolidating services in one central location, the Centers can help families get what they need to be stable from multiple existing community organizations.
 - **DATA:** In Pierce County, 22 percent of households don't make enough to provide their families with basic needs like food and shelter.
- United Way of Pierce County funds solutions that address the multiple needs affecting our families. This approach makes United Way the best way to help the most people.
 - **DATA:**
 - **OUTCOME:** Over 400,000 people were helped by the programs receiving funding from United Way. The programs address multiple issues like food, shelter, healthcare, job training, legal assistance and more.
 - **STORY:**
- United Way of Pierce County combines the gifts of many donors with grants, in-kind product donations and volunteer service to turn every dollar donated into a \$1.36 reinvested in the community.

WHAT: We make sure nothing stands in the way of people having a good life so our community can thrive. When our community thrives, we all benefit.

- The first step toward breaking the cycle of poverty is knowing where to turn for help. South Sound 2-1-1 can help callers find the right resources and get connected to programs that can get them on their feet.
 - **DATA:** In 2014, 32 percent of callers to 2-1-1 lived in homes with children under five.
 - **OUTCOME:** 80,000 people were connected to services in 2015
 - **STORY:** Jamie called 2-1-1 when her electricity was shut off following her husband's layoff. South Sound 2-1-1 connected her to utility assistance, giving her back the ability to heat her home and cook meals for her daughter.
- A strong start and success in the early grades gives more children the opportunities they need to get out of poverty.
 - United Way is focused on making sure parents have the support and tools they need to help their kids be prepared to start school ready to succeed through our Parent Support Program.
 - **DATA:** An estimated two in five Pierce County children are not ready for kindergarten.
 - **OUTCOME:** 800 families were reached through the Parent Support Program
 - United Way is focused on making sure kids have access to books and the tutoring they need to read at grade level by the end of third grade, a key indicator for a child's future success in school.
 - **DATA:** Before the third grade, children are learning to read and after that, they are reading to learn. One in four kids not reading at grade level at the end of third grade will not graduate.
 - **OUTCOME:** Volunteers built 23 Little Free Libraries making books accessible in the communities where children live.
 - **DATA:** Each Year, low-income students lose an average of more than two months in reading achievement in the summer, while their middle-income peers tend to make gains in reading
 - **OUTCOME:** Distributed 658 books to low-income children at summer meal sites
- Job training, financial security and access to basic needs create strong families, helping them break the cycle of poverty.
 - United Way is focused on more than just helping families get on their feet. We want to help them stay on their feet.
 - **DATA:** In Pierce County, 22 percent of households don't make enough to provide their families with basic needs like food and shelter.
 - **OUTCOME**
 - **STORY**

URGENCY: We need you now more than ever. More families are struggling, including many working families. We recently learned that in addition to the 12 percent of people living in poverty, there is another 22 percent struggling to put food on the table or pay their electric bill. That is one in three of us. Giving is down... at a time when our neighbors need our help more than ever.



United Way
of Pierce County

MEMORANDUM

TO: UWPC Board of Directors

FROM: Lindsay Morgan Tracy, VP Community Impact & Engagement

DATE: March 22, 2016

RE: Updates on Community Impact Cabinet work going into the next 3-Year Investment Cycle

Status

Over the past 5 months, we have been meeting with a stellar group of countywide leaders in order to strategically inform our next 2017 investment process to align with the goal of breaking the cycle of intergenerational poverty.

The goals of the 2017 investment process are to be intentional on how we engage with our partners, ensure accountability toward impact and better utilize resources toward to foundational shift on continuous improvement. The shift builds on the foundation of our past work and will move our United Way into the transformational backbone work over transactional work. In addition, there will be no guarantees to move into the next year of our portfolio.

Important to note is our focus on data and having defined metrics and indicators in place for each of our initiative areas. We are moving from letting the work happen and measuring it to helping the work happen and measuring it. This change will take time and we trust it will alter conditions in the community in a positive way. Therefore it is important to know that we are moving from focusing on funding programs, to funding strategies which get us to results. For instance, we may be funding several programs around one strategy.

United Way of Pierce County will make investments in efforts or projects that are working towards breaking the cycle of intergenerational poverty through one or more of UWPC's strategic initiative areas. To be considered for funding, proposals must:

1. Align with the goal of at least one UWPC strategic initiative area;
2. Positively influence the overall Community Outcome and at least one (1) additional outcome measurement listed below; and
3. Apply at least one key strategy outlined for selected initiative area.

Funding Models

We are striving for the highest impact through a focus on performance, transparency and accountability. While the change we seek will take time to manifest, we will measure performance by monitoring leading Key Performance Indicators that are measurable and likely predictors of success. In order to augment the measurable configuration of our collective investment, we must also assess the financial model that complements the impact work.

The financial model recommendations will be approved by CIC next week and the recommendation being put forth will be based on a five point percentile range and not limited to the confines of being at 30 percent (for example):

1. Basic Needs and Connected Communities – 30%
 - Also includes 2-1-1
 - Hunger Work

- Community-based Solutions
- 2. Successful Kids (birth – third grade) – 30%
- 3. Strong Families – 30%

The financial model will also include resources dedicated to:

1. Direct Services, Community Engagement, Programs
2. Advocacy – up to 5% (which may be encapsulated into the initiative areas)
3. Capacity Building – 5% (to be responsive to portfolio needs throughout the year)

Minimum and maximum types of funding

1. Direct service : \$10,000 to \$50,000
2. Collaboratives : \$30,000 - \$75,000
3. Collective Impact : \$75,000 - \$100,000+

Funding Strategies

To effectively address the goal of breaking the cycle, United Way will use several interrelated strategies for systems change and impact with this funding cycle.

Longer-term funding will be tied to specific outcomes that advance the 10-year goals and multi-dimensional strategies. Partners with a commitment to work with us through 2020 (ongoing investments would be contingent upon established criteria and results).

- ***Community Impact Investments*** – 3-year initiative-focused investments designed to support a stronger network of nonprofits leading the way in reducing poverty for children and families in our community (*1 year, renewable up to 3 years*). Partners receiving Community Impact grant funding will be expected to:
 - Adopt shared community outcome measures and utilize a common database to share data and information.
 - Work together as a cohort to create and participate in learning communities designed to share experiences, exchange data and information, and build collective knowledge around new and promising practices to improve outcomes for low-income families and their children.
 - Advocacy or public policy work that has a direct impact on the initiative goals and community outcomes and/or provides advocacy or policy work that addresses specific individual, family or community outcomes within an initiative.

Short-term funding grants are intended to be responsive to community trends and needs and are time-specific investments that would be contingent upon established criteria.

- ***Neighborhood Grants*** – Applications will be reviewed as needed (on a rolling basis) when funds are available - - not via our traditional three-year investment cycle.
- ***Capacity Building Funding*** – One-time funding, for partners funded during the 2017-19 Community Impact Investment Cycle, designated for capacity building and/or program quality improvement which assists organizations to more effectively impact the initiative goals and community outcomes. Requests for capacity building funding will be reviewed semi-annually.

Investment Policy

All investment decisions are made at the discretion of United Way of Pierce County’s Board of Directors based on recommendation of volunteer and/or staff committees from the robust work of the CIC. The UWPC Board of Directors will be the sole final authority regarding the approval or disapproval of grant awards and the conditions under which they are awarded. New to this process is that all grants approved by the Board of Directors are final and not subject to appeal or review.

United Way may elect not to fund or advance any organizations with known management, fiscal, reporting, program or other issues that make it unlikely that they would be able to meet the deliverables aligned against the 10-year goal of breaking the cycle of poverty. United Way reserves the right to reject any and all programs, in part or in whole; to negotiate with organizations; and to award funding to those programs deemed most likely to contribute to the success of impact in our initiative areas. Lastly, being invited or submitting a request to partner is not a guarantee of funding.

Memorandum of Understanding

Our Memo of Understanding (MOU) is much more comprehensive than in year's past. This will be another change that the impact partners are privy to. Delineation of how United Way is accountable to the funded partners is listed and a reciprocal delineation of how the partners are accountable to United Way is clearly itemized. Funding is contingent upon results, partnership, and our own internal campaign.

Further appendices highlight the level of detail we need from partners

1. Grant Award & Contingencies : Partners will understand that the grant award is based on performance and UWPC resources
2. Co-Marketing Requirements : Partners will agree to support United Way during its fundraising campaign and in the community (in identified ways) and understand that failure to participate could lead to a reduction or elimination of funding
3. Reporting & Evaluation : Partners agree to measuring the impact we have on the community, and to track how we can collectively learn how to improve our efforts
4. Financial Reporting Requirements : Partners will submit reports compliance, client characteristics, program outcomes and results achieved by the program participants
5. Financial Review & Audit Policy : Partners and UWPC share a responsibility for rendering a complete and proper accounting of funds contributed by the community for fiscal soundness
6. Counterterrorism Compliance : Partners and UWPC comply with USA Patriot Act
7. Change in Funding Status : Partners will understand parameters of defunding and agency monitoring

We will have an opportunity to discuss further at our meeting on Friday. In the meantime, if you have any questions, please feel free to contact me at lindsayt@uwpc.org.

Thank you.

2017 Investment Plan

Background

United Way of Pierce County is committed to one big goal: breaking the cycle of poverty in Pierce County. This is the goal that will guide our work into the future, and it will define the measures of our success.

At the heart of the next generation of Community Impact is the shift from being a transactional funder to a relational partner. United Way will continue our long tradition of making investments in our community but with the focus on achieving specific outcomes that will result in strong families, successful kids and connected communities in order to break the cycle of intergenerational poverty! This process will involve: employing data and evaluation to track and measure success; convening learning cohorts to share knowledge, best practices and innovative ideas; mobilizing more volunteer resources; and increasing advocacy and community engagement work.

Our highest leverage point to break the cycle occurs during children's most formative years – ages 0 to 10 years – and their families. The best way to create a thriving community is by making an early investment in our children. We also know that, especially for young children, their success is determined by the stability and support of their families. Additionally, when parents participate in the children's education, academic achievement and attendance rates go up. However, when parents are struggling to make ends meet, their time and resources are limited. By focusing on children, United Way will work with community partners to help families achieve economic success and lay a solid foundation for the children's future success in life.

Our Focus:

We acknowledge that breaking the cycle of poverty is an ambitious goal, and we recognize that there are a myriad of factors contributing to poverty. The approach used must range from overcoming short-term challenges to addressing long-term and systemic change. Our approach will focus on three areas:

- ***Strong Families*** – Families are able to access integrated services, including workforce development, access to income supports and financial coaching, so they can become financially stable.
- ***Successful Kids*** – All children entering kindergarten are ready to learn and are reading at or above grade level by the end of third grade, so they are positioned for success in school and life.
- ***Basic Needs*** – A critical safety net of services, opportunities and supports for low-income children and families that move them from crisis to stability.

GUIDING PRINCIPLES

As part of creating the 2017 investment plan and financial models the following principles will guide our work:

Resources

- Focus all resources (human and financial) in outcomes related to breaking the cycle of poverty via our work.
- Allow for flexibility in funding as well as timelines during any given year in order to address emerging needs.
- Shift from a “spending” mentality to an “investment” framework that is aligned to the 10-year goals.
- Move to funding fewer and more strategic partnerships.
- Allow for investments to a wide range of strategies that go beyond funding agencies (communications, public will building, collaborations, place-based initiatives, advocacy, etc.).
- Invest resources to build capacity and/or capability building.
- Focus on countywide approaches to work.

Engagement

- Engage potential partners throughout investment process.
- Allow for continued input by the community - create environments that welcome and support the participation of all people who want to and value opportunities to work together.
- Ensure that engagement and public policy strategies are in place and authentically engage targeted communities.

Partners

- Invest in the most strategic partners that could include public, private and nonprofit sector entities that are qualified to address the 10-year goals.
- Support partners who are working with others through either alliances/collaborations.

Accountability

- Focus on results against 10-year goals.
- Establish benchmarks throughout investment to ensure continuous improvement.
- Commit to using a lens of equity for all work for which we lead, support or invest.

RATIONALE FOR MODEL

Everything we do is to advance the greater good.

To create social change, we must continue to take bold steps toward a fundamental transformation.

- Engagement becoming the foundation for everything we do.
- Building on lessons learned to invest capital in partners aligned against the 10-year goals.
- Focusing on engagement strategies and public policy to solve complex social issues.
- Organization aligned to work against the 10-year goals with the talent, expertise and capabilities to demonstrate impact of everything via quantitative and qualitative work.
- Emphasize the role of coaching that United Way can have with multiple agencies for sector change.

Overall Investment Recommendations

- Investment for long-term efforts aligned with the 10-year goals and multi-dimensional strategies (capital, policy, and engagement) may be targeted to specific communities and/or populations. All organizations interested and meet criteria for any given strategy may submit an application.
- Investments for long-term efforts aligned with the 10-year goals and multi-dimensional strategies may go beyond a three-year funding cycle and would have specific requirements for results accountability.
- Allow for investments to a wide-range of strategies that go beyond funding agencies (communications, public will building, capacity building to strengthen UWPC's ability and partner's ability to achieve 10-year goals, advocacy and engagement).
- Allow for flexibility in making investments as well as time lines during any given year in order to address emerging needs.
- Funding for direct or safety net services may be awarded on a multi-year renewable basis contingent upon organizations or collaborations meeting specified outcomes and criteria.
- Potential partners should meet a set of standard partnership criteria that includes evidence of strong staff and volunteer leadership capability, focus on learning, and commitment to transparency.

In addition:

- All investments will be contingent on the outcome of the United Way campaign and performance standards by the partnering agencies.
- No funding guarantees for current funded organizations – current funding cycle ends December 31, 2016.
- At any time during any given fiscal year, partners can be reduced or eliminated based on not meeting established criteria.

- Partners are expected to appropriately recognize UWPC for being a funding partner.

IMPACT AREA INVESTMENTS - KEY ELEMENTS

Investment opportunities will be open to 501(c)(3) organizations as well as private and public partners for consideration:

- Currently funded organizations will be eligible to submit an application for funding consideration.
- New partners are encouraged to apply based on mission alignment with the 10-year goals.
- A portion of funding will be set aside in order for UWPC to remain flexible and responsive to emergent technical assistance needs or capacity building requests.

Recommended Funding Strategies

Grant Funding

- **Long-term** – Tied to specific outcomes that advance the 10-year goals and multi-dimensional strategies. Stellar and enduring partners with a commitment to partner through 2020 (Ongoing investments would be contingent upon established criteria and results).
- **Short-term** – Short-term in nature intended to be responsive to community trends and needs (e.g. Neighborhood grants). Time specific investments that would be contingent upon established criteria.

Capacity Building Funding – One-time funding which must be aligned with our 10-year goals to support strategies that are breaking the cycle of intergenerational poverty.

PARTNER SELECTION CRITERIA/PROCESS

Partners could include a wide range of organizations including nonprofit, private and public entities.

- Leadership and community presence: the organization is transparent, accountable and positively viewed in the community
- Capacity to deliver on outcomes: the organization regularly measures its performance against a clear set of goals
- Sound fiscal management: the organization is a responsible steward of managing its financial resources

Partners will be selected upon on the basis of specific criteria outlined in the Investment Guidelines and Strategies. In addition to the standard selection criteria, decisions will be based on:

- Performance – including past performance
- Capacity
- Alignment
- Reviewer and staff feedback on how funded agencies have intentionally partnered with UWPC

FINANCIAL MODEL RECOMMENDATIONS

While percentage of funding to each impact area are to be determined, the percentages will be determined and based *on a range* - dependent on applications.

- Basic Needs and Connected Communities (e.g. direct services, initiatives, hunger work, 2-1-1) – at least 30%
- Successful Kids (birth – third grade, direct services, advocacy, collaborations) – at least 30%
- Strong Families (advocacy, direct services, collaborations) – at least 30%
- Advocacy – 5%
- Resources dedicated to UWPC for responsive capacity building needs from the portfolio – 5%

INVESTMENT POLICY

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The Community Leaders Conference is the leading edge of United Way's global movement. It's the connective tissue of 1,800 United Way communities that, when we are working together as a network, form the most significant lever to create community change in the world. Executives and volunteers from Mumbai to Memphis and everywhere in between will convene to share the opportunities, struggles and promising practices that are inspiring and moving our work forward. We will hear from leaders in government, labor, foundation and corporate space, as well as thought leaders in the sector and award winning NGO & United Way leaders. It's the event where the true scale and scope of the United Way network comes to life. If there is only one event you participate in this year, make it United Way's premier leadership event for leaders by leaders, the Community Leaders Conference.

DATES

MONDAY, MAY 9 - THURSDAY, MAY 12, 2016

LOCATION

Vancouver Convention Centre
1055 Canada Place
Vancouver, British Columbia V6C 0C3

SCHEDULE

MONDAY, MAY 9

- 4:00-6:30 p.m.: Registration
- 6:00-9:30 p.m.: Host City Event

TUESDAY, MAY 10

- Breakfast on your own
- 9:15-10:45 a.m.: Opening General Session
- 11:15 a.m.-12:30 p.m.: Learning Sessions
- 12:45-2:15 p.m.: Lunch & General Session
- 2:30-3:45 p.m.: Learning Sessions
- 4:15-5:30 p.m.: Learning Sessions

WEDNESDAY, MAY 11

- Breakfast on your own
- 8:00-9:30 a.m.: General Session
- 10:00-11:15 a.m.: Knowledge Exchange & Networking
- 11:45 a.m.-1:30 p.m.: Lunch & General Session
- 2:00-3:15 p.m.: Learning Sessions
- 3:45-5:00 p.m.: Learning Sessions

THURSDAY, MAY 12

- Breakfast on your own
- 8:30-11:00 a.m.: Closing General Session
- 12:00-5:00 p.m.: Ancillary Meetings

FRIDAY, MAY 13

Ancillary Meetings

REGISTRATION

I am not a United Way staff attendee. [Please click here to register.](#)

(<https://uwa.emettingsonline.com/emettings/websitev2.asp?mmno=779&pagename=SITE189267>)

Early bird registration is \$995 USD per person and ends Monday, April 18. After April 18, regular registration is \$1,095 USD per person.

HOTELS

Room blocks have been reserved at these four hotels next to the Vancouver Convention Centre:

Pinnacle Hotel Vancouver Harbourfront
Vancouver Marriott Pinnacle Downtown Hotel
Fairmont Waterfront
Pan Pacific Vancouver

[Please click here to book your sleeping arrangements and to receive the special United Way discount rate.](#) (<https://registration.experientevent.com/ShowUWW161/>)

HOST CITY EVENT

United Way of the Lower Mainland is thrilled to welcome the world at the [Vancouver Aquarium](#), where we will celebrate the “Spirit of British Columbia” with our generous presenting sponsor, the United Steelworkers Union.

The Vancouver Aquarium is located at:
845 Avison Way, Vancouver, British Columbia, Canada

NOTE: Buses will begin pick-up to The Vancouver Aquarium at 6:00 p.m. Don't forget to pick-up your registration packet at the Convention Centre and have your name badge before boarding the bus.

GENERAL AND FEATURED SESSION SPEAKERS



Brian Gallagher, became President and Chief Executive Officer of United Way of America in 2002 and then of United Way Worldwide in 2009. In 2002, he immediately took on the challenge of leading the transformation of the organization to focus on community impact. A career veteran of the United Way system, Gallagher believes that the true measure of success for United Way and other philanthropic organizations is bottom-line results: the lives that are changed and the communities that are shaped. This represents a dynamic shift from the United Way recognized for decades as the nation's premier fund raiser and distributor. Gallagher has raised the bar on the accountability, governance and transparency standards adopted as a requirement of membership for all United Ways. Today, United Way has 1,800 local affiliates in 41 countries and territories raising \$5.2 billion annually, with 9.6 million donors and 2.2 million volunteers. [Follow Brian on Twitter](#).



Beth Kanter, named as one of the most influential women in technology by Fast Company Magazine, Kanter has developed programs to help nonprofits integrate social media, network building and relationship marketing. Author of [Beth's Blog: How Nonprofits Can Use Social Media](#), Kanter has over 30 years of experience working in the nonprofit sector in technology, training, capacity building, evaluation, fundraising and marketing. [Follow Beth on Twitter](#)



Stacey Stewart, U.S. President of United Way Worldwide, drives the strategic direction for United Way in the U.S., working with leaders throughout the United Way network to drive community impact in the areas of education, income and health. Stewart also works to protect and enhance the organization's brand and reputation. Prior to this appointment, Stewart was Executive Vice President, Community Impact Leadership and Learning at United Way Worldwide. Before joining United Way, Stewart was with Fannie Mae where she was Chief Diversity Officer and Senior Vice President for the Office of Community and Charitable Giving. Prior to that appointment, Stewart was President and Chief Executive Officer for the Fannie Mae Foundation. [Follow Stacey on Twitter](#)