

Transformation Diaries

United Way of Dane County

Over the past decade, United Way of Dane County has been transforming itself into a Community Impact United Way. In 1995, when the organization became part of a community collaboration which focused on education, there was no concerted effort to become a community impact leader. The initiative's success, however, caused United Way to rethink its role in the community and eventually restructure its organization from the inside out. Ten years later, United Way can boast an impressive community outcome—elimination of the racial achievement gap at the third grade reading level—and is now poised to tackle a laundry list of other pressing needs with the help of its community partners.

Madison, Wisconsin, home to United Way of Dane County, is a city of about 225,000 people in a county of 450,000. The presence of the University of Wisconsin in Madison, with its roughly 40,000 student population, has contributed to this Midwest city's reputation as a desirable place to live. Madison ranks high on quality of life and standard of living indexes, and is consistently ranked among the "top 10" best places to live by Money Magazine. It was also recently ranked the healthiest city in the country by Men's Journal magazine. The area's consistently low unemployment rate, reputable school system and abundant recreation activities offered by the nearby lakes, walking and biking trails combine to make Madison a desirable place for many.

However, a closer look at the statistics reveals that Dane County is not paradise for everyone. Fifteen percent of the population lives below the poverty line, which is above the national average. The population is also experiencing a substantial demographic shift. While 15 percent of the general population is of color, 42 percent of the students in the public Madison Metropolitan School District are of color, as are 50 percent of students entering Kindergarten.

The proportion of school children facing problems such as poverty and other barriers to success is also rising. In 2005, 37 percent of the students in Madison Metropolitan Schools come from low-income families, up from 24 percent in 1995. At many grade levels, a wide achievement gap exists between white and students of color. In addition,

United Way reports that 35 percent of children entering Kindergarten do not have age appropriate skill levels.

United Way President Leslie Ann Howard says, "We've got pockets of poverty and pockets of at-risk neighborhoods, so while there's a really wonderful quality of life for a lot of people; there are groups of folks who, in terms of their education, employment, and income, are kept apart from that."

United Way of Dane County has had a strong presence in the Madison community for decades. Even before its transition to community impact began, United Way was known as a respected leader and partner. United Way had worked in partnership with city and county government for more than 10 years. Its annual campaigns have grown steadily each year, which has helped to maintain this favorable reputation. Thus, this latest transformation is a natural outgrowth of a long tradition of success in the Madison community.

An Impetus to Change

Several forces collided in the mid-to-late 1990s to form a catalyst for United Way of Dane County's move toward community impact. United Way was recruited to lead a collaboration called Schools of Hope, an educational achievement program whose mission resonated with the public and which was beginning to show signs of success. At the same time, donors were challenging President Leslie Ann Howard with demands for a focus on reducing community needs. This "collision in the stars" led United Way to change its mission and rethink its role in the community.

Perhaps the biggest impetus for United Way's transformation was the success it was starting to see with its Schools of Hope initiative, begun in 1995. This was long before community impact, making measurable change in community conditions, even became a goal.



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Schools of Hope started as a civic journalism project, which was conducted by the *Wisconsin State Journal* newspaper and the local CBS affiliate, WISC-TV. The project produced a series of reports which uncovered a wide achievement gap between the academic success of white students and students of color in the Madison Metropolitan School District. The media asked United Way President Leslie Ann Howard, who has held that position since 1989, to head a leadership team to examine the issue and work on a solution. After thoughtful research, the team, consisting of local government, university, public school and labor union representatives as well as parents, students and leaders from business and minority communities, decided to engage the community in the challenge of reducing the racial achievement gap for 3rd grade reading and Schools of Hope was born. This was a significant and risky decision given the local history and politics around the issue. Over 15 years, \$20 million had already been spent on this issue, yet the gap was still growing. Increasingly, the community was looking for whom to blame rather than how to solve the problem. “We were sticking our neck out and, in the end, it would be easy to see if we were a success or a failure,” recalled Howard.

With continued research and broad community input, numerous strategies were identified that would make progress on the achievement gap. First, hundreds of volunteer tutors were recruited through front page newspaper articles and the program eventually grew into 1,000 trained adults tutoring 2,000 students per year. In addition, work was done in the schools to reduce class sizes, provide additional teacher training and revise the curriculum.

By the late 1990s, community-wide results of Schools of Hope were already beginning to show. The racial achievement gap was decreasing and the community was starting to take notice. “By 1999, we had impact with Latino and African American students,” says then- Vision Council chair and now Senior Vice President of Community Impact Deedra Atkinson. “We learned that getting stakeholders on board and using research and indicators worked- we could see it making a difference. We were in the impact business, although we didn’t realize it at the time.” Finally, in October 2004, the superintendent of schools announced the district no longer had evidence of a racial achievement gap at the third grade reading level.

As progress was being made around Schools of Hope in the late 1990s, key donors and board members were increasingly asking Leslie Ann Howard why the same type of success wasn’t being realized with other community issues. There was a concern that increasing campaigns

were not leading to a true impact on social problems. Howard recalls, “I started hearing from the voice of our donors, in the mid 90s, “United Way, you’re back every year, you’re telling us the needs are greater, and we believe you but we don’t like it. What are you doing to reduce and eliminate these underlying causes?”

In addition, some volunteers at the time felt disillusioned and wanted United Way’s work to be more focused. According to United Way Vice President of Community Building Nan Cnare, volunteers felt as though United Way should work to “pull everything together” and focus on specific community needs. Howard remembers that the success with Schools of Hope was a big turning point. “Actually going through that, seeing the opportunity to move the needle at a community scale and getting such astonishing results made me think - maybe we can do things at a different level.”

United Way of Dane County certainly did not fall haphazardly into this new role as a community impact leader. Several important factors led to United Way being asked to take the lead on Schools of Hope. The organization had been working for years with a variety of community partners on projects such as joint needs assessments. These deep and long-standing relationships meant United Way was highly trusted. Consistent annual campaign growth also contributed to the community’s perception of United Way as an effective and successful organization. Howard says “People knew we would follow through and that made it easier to step into a leadership role. I think those deep collaborations were critical ... it gave us credibility that we could build on. It allowed us to take the risk and stick our neck out.”

Creating a Shared Vision

Encouraged by the success it was beginning to realize with Schools of Hope, United Way of Dane County made it a top priority to engage the community in building a shared vision for change. After three years of community visioning and research, a new Agenda for Change was created.

United Way’s move into a new building in 2000 provided an important opportunity for community engagement. “We used the launching of our building to invite the community in and ask them about our future direction,” says Howard. In addition to the food and tours of the new facility, the grand opening included several community engagement exercises. United Way asked the public for its advice on what community issues should be addressed and how.

This event began a tradition of holding a community engagement exercise at each and every United Way event from that point on. Howard says, “Now, we don’t ever have an event unless we ask people something.” The Day of Caring includes a community engagement exercise, and when speaking to groups such as the Rotary, United Way conducts a brief survey of the members. Further community engagement exercises include electronic surveys for employees of large corporations and tear-out sheets published by the newspaper, which community members can send back with input on a specific topic.

Much of the work to collect this wide range of input from diverse perspectives was done by the Focusing Resources Committee, created in 2000. The 50-member multidisciplinary task force, made up of representatives from all parts of the community, engaged the public through surveys and forums, learned from subject-matter experts and conducted research and analysis. Committee leader Jim Blanchard says, “This work provided an opportunity to bring together people who had not previously been associated with United Way—developers, hospital officials, public sector representatives, teachers, labor representatives, neighborhood association members, state officials—people that were all new.”

Eventually, the Agenda for Change, made up of seven community visions, was established. The visions are:

- 1) Students of color achieve at the same rate as white students.
- 2) Children are cared for and have fun as they become prepared for school.
- 3) People who are uninsured have access to healthcare.
- 4) There is a decrease in homelessness and more affordable housing is available.
- 5) Seniors and people with disabilities are able to stay in their homes.
- 6) There is a reduction in violence towards individuals and families.
- 7) Non-profit agencies and volunteers are strong partners in achieving measurable results.

Atkinson says that, unlike some of the visions she has seen from other United Ways, the ones Dane County established are narrowly focused. Instead of targeting a population or an issue, “Our visions are much more specific and results-oriented.” Howard believes “The most important aspect of United Way of Dane County’s transformation was identifying the Agenda for Change and figuring out what things we were going to work on—that’s what created the change.”

Establishing Alignment and Leadership

Parallel to engaging the community and prioritizing issues was an effort to restructure United Way as an organization, especially from the governance side, and put more focus on the visions. This has led to new roles for volunteers and staff, making all more invested in the community impact mission.

The experience with Schools of Hope led United Way to rethink its structure. The administration of that project was being overseen by three different United Way committees, making collaboration difficult. Nan Cnare said “On a practical level we were realizing we needed to change dramatically. Our desire to look seamless to the community, meant that we were running around behind the scenes trying to make sure all of our processes worked together.” To remedy the situation, the Focusing Resources Committee was given the additional task of recommending a new structure for United Way.

Committee chair Blanchard recalls, “We had to set up a structure that would allow us to really determine what mattered in the community, what was important...and then be able to get the resources to focus on those areas.” As part of this process, six Community Solutions Teams (CSTs) were created around the seven community visions of the Agenda for Change. Each CST includes at-large members of the community, subject-matter experts and representatives from agencies, business and the University of Wisconsin. They try to have a balanced representation of the groups mentioned above as well as age, ethnic and geographic diversity.

Efforts to appoint strong volunteer leaders and bring new people into the United Way system were made from the beginning. “We spent a lot of time picking people to lead these teams, and I think that was very important,” Blanchard says. Then Director of Fund Distribution and current Director of Community Building Kathy Hubbard adds, “The chairs and co-chairs are as likely now to come from outside the system as from within. Blanchard explains their efforts to integrate old members, who were familiar with the United Way system, with the newcomers: “We tried to meld the old with the new. Those who knew the old were able to give us some coaching...and the newcomers were always pushing the envelope to go further and faster.”

A United Way staff member is assigned to each CST to oversee its administration. CSTs are responsible for developing priorities and indicators related to the visions, developing solutions related to underlying causes, creating and participating in partnerships, and allocating resources to agencies. In order to coordinate the work of these teams, a separate entity called the Vision Council was formed. The Vision Council includes the Chair and Vice Chair of each CST as well as selected agency and community representatives and reports to the United Way Board of Directors.

This new governance system has replaced the old needs/allocations committee that would meet primarily to address allocation issues. “Our CSTs meet and are active literally 365 days a year,” says Jim Blanchard. Their duties move beyond simply allocations to involve community engagement and program evaluation. “Really the big change has been the CSTs are so active and we continue to expand the areas that they get involved with.” Ultimately, the teams hold the responsibility for moving the needle on the Agenda for Change.

According to Blanchard, a strong effort was made to help volunteers take ownership of the CSTs work rather than being led by staff members. “Volunteers are now truly the leaders of the teams and I think that has helped a lot.” Howard agrees that the changing role of volunteers has been a big part of the process. “Typically our allocations volunteers were responsible for a process. Now the teams are responsible for results at the community level. It’s a different type of behavior for both the staff and the volunteers.” With some bylaws changes to allow for special appointments, all chairpersons of the CSTs are now also members of the United Way of Dane County Board of Directors.

Cnare advises other United Ways to remember, “Volunteer engagement throughout the transformation process must include all areas of work (campaign, finance, and marketing as well as community building) and must begin very early on.” As often happens during a time of change, some volunteers were lost, but those who remain play an increasingly important role in United Way’s work, are much more invested and feel accountable for the community impact mission.

“We have dramatically increased the amount of time our board spends on these issues,” says Cnare, “At every board meeting, our agendas are organized around our Agenda for Change and we have substantive discussion. It’s not reaction but substance around the issues and the strategies necessary to make change happen.”

Partner Engagement

United Way’s plan for transformation included extensive changes in the role partner agencies would play in the community impact structure. The new work moves from funding agencies based on populations served to funding programs based on alignment with community visions and outcomes. United Way focused on communication and including agencies throughout the process, and has changed the way it relates to agencies on a daily basis.

United Way decided that all funded programs must now align with one of the seven visions that make up the Agenda for Change. In 2001, President Leslie Ann Howard and her staff began a thorough, hands-on process of working with agencies one-on-one to identify how programs fit in with United Way’s goals and make changes if necessary.

In cases where programs did not align, work was done to help agencies understand and move their programs toward a focus on vision outcomes. In what became known as “The Future is Now” meetings, Howard and her staff worked one-on-one and in small groups with agency leaders. During a two year transitional period, United Way held funding flat, while giving agencies time to respond and align. Eventually in 2004, the biggest changes in funding were made.

Brian Cain, Executive Director of Catholic Charities of Madison, a United Way partner agency, says he has been impressed with the focus on communication throughout the transformation process. “They bend over backwards to be inclusive (of agencies). United Way gave us every opportunity to comment and buy in.” Throughout the process, agency leaders have been included as members of the Vision Council and individual CSTs, giving them a voice as true partners in the process. Howard says that this active engagement of agencies in the transformation process is an area where she differs from some of her United Way colleagues across the country. “We went way beyond what we would normally do to work with the agencies. We made sure they were involved every step of the way. We saw it as our job to engage agencies just as we engage the rest of the community.”

One of Howard’s main goals as part of United Way’s new mission is to help agencies move beyond their role as service providers into a new and enhanced role of providing leadership to reduce the underlying causes of community issues. Howard feels that the nonprofit sector has been “relegated to a low-cost service provider for government as

opposed to a leadership entity which gets in and solves problems. We ought to be strengthening that sector now and building it to have more credibility.”

This intensive work with agencies also encourages accountability. Cain says he appreciates the focus on outcomes. “I think a change was needed in the United Way funding process. Before, there was no accountability. Now, I think we’ll see that agencies are better able to leverage funds from other sources beyond United Way because of the increased role of outcomes and accountability.”

To date, about 50 percent of funds have been moved into programs that align more closely with United Way’s new visions. So far, about a dozen agency programs have been de-funded. “We de-funded and we realigned our funding to fit with our mission,” says Hubbard.

Although all the previous 100 participating agencies have been maintained as partners, many of those with programs not aligned to the Agenda for Change, have been switched to a donor designation status. Additional programs and new agencies have been added, but Howard says she sees the trend emerging that significant United Way funding will be given to a more focused group of agencies tied to the Agenda’s visions. “I see us getting more focused and investing more dollars through fewer strategic partners.” She notes that funding for many traditional United Way programs has already been significantly reduced.

United Way has found the process to be more difficult with the local chapters of larger, national organizations, which have clearly defined missions and charters that can not easily be changed to fit with United Way’s new goals. They are currently still working with some of these agencies to determine how their programs can become more aligned with its visions.

In all, this work has led to a more “purposeful engagement” with agencies on a daily basis, according to Hubbard. Because agencies are represented on every community committee, United Way no longer conducts special agency appeals or quarterly meetings as they had done in the past.

Establishing Successful Strategies

Throughout the transformation process, United Way has established strategies critical to making community impact initiatives successful. These strategies, learned through Schools of Hope, will continue to inform United Way’s work with future initiatives.

Putting forth a specific, concrete goal and communicating it to the public from the beginning of the initiative is an important new strategy for United Way. In the case of Schools of Hope, the goal was to eliminate the racial achievement gap at the third grade reading level. Although this may have sounded grand and dramatic, it was also specifically focused and achievable. Atkinson says that although focusing on a specific goal can be intimidating, it is extremely exciting. “You have to pick a target and publicly declare a goal,” Atkinson says.

Kathy Hubbard agrees that publicly declaring a goal was a big factor in getting the community motivated. “It’s that aspirational, motivational way of looking at things. Attitudes change...and people are more likely to step forward.” The specific focus is also critical. Rather than focusing on reading in general, the achievement gap issue was broken down into a concrete action step for third graders that people could easily grasp.

A strong partnership with local media was another important learning from Schools of Hope. It reinforced the need for United Way to make a concerted effort to foster effective relationships with local media. The publisher of the *Wisconsin State Journal* is now chairing one of the CSTs, and regular meetings are held with reporters to update them on results related to the visions. Annual meetings with editorial boards of local media are also now a priority. Cnare says, “I think Schools of Hope was greatly successful because of our strong partnership with the local newspaper and TV. The civic journalism concept was critical.”

The concept of “working at scale” was another strategy learned with the Schools of Hope project. Instead of working with one elementary school, they decided to involve the entire community and work in all 24 Madison elementary schools. Cnare says, “Our intent is that the big goals we have are community-wide goals. And then behind the scenes you break that up into the pieces that get you there.”

Lessons learned

United Way's focus on its role as a research leader has also grown out of Schools of Hope. In that initiative, they worked with 16 University of Wisconsin professors to uncover and synthesize research on racial achievement and to focus in on activities that have been proven to work. Now each one of its initiatives is grounded in some sort of research.

“Research is the one thing that we’re doing now that we hardly ever did before,” says Nan Cnare. “Best practices and research was something we depended on the agencies to do and now it is our role. We have switched from being process experts to being process and subject experts,” she says of the United Way staff. United Way believes that their new focus on national and local research and best practices frees partner agencies up to focus more on the effectiveness of their programs and how they align with the advice garnered from the research. Cnare says, “Now we are making sure that our agencies are relying on practices that are proven to be successful.”

Research also helps determine the indicators United Way uses for all of its initiatives. In Schools of Hope, the indicator of the achievement gap was used to educate the community, focus attention and foster collaboration around a single concern. Indicators also provide a way to track community progress, which sustains public interest and assures commitment to accountability for the long haul.

A deliberate effort to focus everything United Way does around the Agenda for Change and its new visions is another new practice. Everything from campaign materials to the annual meeting is focused around some of the aspect of the Agenda for Change. Howard says this is successful because the visions have proven to be such a powerful tool to motivate others. “When you’ve hit on the right visions, no one can argue with you. When I go over this agenda (with various groups), I don’t have to explain it. It includes the things that people know have to be addressed and they understand why.” This also provides evidence that the forming of community visions through public engagement facilitates the direct buy-in from the public when you go out to implement strategies.

The effectiveness of bringing in new and diverse partners well beyond social service agencies is a key lesson from Schools of Hope. Atkinson explains, “One of the major changes is we’re no longer just talking to agencies, we’re talking to other stakeholders,” including local government, the schools, businesses and members of the media. Howard says, “We are going to work with whomever we need to and see wherever the intervention is required.” United Way

is again using this approach to begin work with the three hospitals on a health initiative that would provide access to healthcare for the uninsured. Although it may seem strange to allocate United Way money to a healthcare initiative, Howard says, “Our notion of who is... a legitimate partner depends on who is addressing the issues that need to be addressed.”

Lessons Learned and Continuing Transformation

The strategies employed in Schools of Hope have laid the groundwork for United Way of Dane County to move forward and address other community impact goals. In reflecting on this experience, all involved have learned numerous lessons that will help guide the way for future work.

First, United Way has learned not to listen to those who say it can’t be done. When the Schools of Hope goal was announced, “some community leaders thought we were crazy to think we could eliminate the racial achievement gap. People told us we were ridiculous to put out such a goal,” remembers Kathy Hubbard. “The schools had spent \$20 million over 15 years trying to deal with the gap and here we were saying we were going to do it with volunteers. It’s really about looking at what’s achievable and believing in it.”

Howard says that United Way had to truly “play the fool” when deciding to go against the critics. “I remember leaving the meeting when we announced our plans to address the racial achievement gap, and thinking—oh my god, I can’t believe I just stuck my neck out like that. That’s the biggest barrier—having the guts to say you believe it even in the face of people saying that you’re a fool.”

Another lesson learned is the value of other resources besides money. Although the school district had spent millions on trying to address the racial achievement gap, dollars were not what was needed. United Way and its partners were able to create great results with resources other than money.

Howard says, “It was not about funding. It was about agreeing on what needs to be fixed, agreeing on how it would be solved and then getting the resources aligned—including existing resources (other than money)... so you can get something to scale. It’s a lot more about mobilizing volunteers, bringing people to the table and identifying the right strategies.”

This realization has changed the way United Way measures its success as a community leader. “It is not about the

money,” says Nan Cnare, “it truly is a change in thinking about how we accomplish our work. It is not just getting money to agencies to accomplish service delivery. It is about focus, collaboration, alignment and results.”

Howard says that through the transformation process, she has come to believe in the “Hawthorne Effect”—by letting people know that you are studying a problem and trying to fix it, you have already begun to have an impact. It becomes a self-fulfilling prophecy. “There’s a big part of me that believes that by saying we’re going to address this as a community, and by believing it can change, you have taken the first step towards success.” She says that in thinking about the human condition, we have to believe that things can change in order to make a difference.

The value of setting an agenda and having the community engaged in the process is another important lesson from Schools of Hope. Howard says that instead of conducting a needs assessment and then “selling” the public on the initiative, the community was engaged from the beginning in creating a shared agenda. Public support of the initiative led to the recruitment of more than 700 volunteers, who expressed interest before United Way was even ready to put them to work. These volunteers were instrumental in making the program a success.

United Way is now utilizing some of its established community partnerships to move forward and create even greater impact. Schools of Hope will soon be expanded and implemented in two neighboring school districts outside of Madison. Research is being used to determine what shape the program will take in the new districts.

United Way has also moved forward with its vision to provide healthcare for the uninsured. One goal is to “increase the number of uninsured Dane County residents accessing primary health care in appropriate settings,” United Way is working with local healthcare providers to implement a pilot program to provide uninsured individuals with access to primary care physicians. Best practices from across the country have been examined, and the program will be modeled after an existing one in Asheville, North Carolina.

The program enrolls uninsured individuals after they visit the Emergency Room, takes care of their medical bills, determines their eligibility for government-run programs, and, in some cases, assigns individuals to a local doctor or clinic. Individuals are also paired with a “health navigator,” a volunteer who helps the participant get to medical visits. The program currently has funding that will provide uninsured individuals with free pharmaceuticals, and will also

soon have a dental component. The goal of this program is to move the uninsured away from ER treatment and into regular physicians and clinics in order to better manage health problems.

United Way of Dane County is also again employing its strategy of publicly declaring a goal and providing concrete indicators. It has announced that it will reduce homelessness among children and families by 50 percent over the next five years. One related initiative was the creation of a design lab to bring together important stakeholders to discuss the issues facing the homeless. Partners including property managers, academics, bankers, financial counselors and formerly incarcerated individuals have come together to educate each other about the issues of homelessness. Through research, United Way has discovered that poor credit is a key root cause of denied apartment rental applications.

Meanwhile, United Way continues its work with an early childhood initiative, established years ago, where they play the role of educating parents about early childhood development issues. Other initiatives related to violence and senior home care are also in the works.

United Way emphasizes that it could take a long time to see results with these initiatives. Blanchard says United Way must be careful in expecting great success from current and future initiatives after the success of Schools of Hope. “I think there is a danger in believing that we have almost the formula for world peace.” They must remember that Schools of Hope took 10 years for results to emerge, and therefore quick results cannot be expected with other initiatives.

For now, there are other ways in which United Way can measure its success. There is definitely a sense that the community’s perception of United Way has changed. Increasingly, the organization is looked at as a community leader, and the place where community initiatives are coordinated. In addition, the annual campaign continues to grow. Hubbard says, “We certainly are increasingly respected as the place where things are happening.” In a county of 2000 nonprofits, it can be easy to lose relevance. But United Way, with its proven track record of success, has clearly differentiated itself. In a recent public opinion poll, they ranked the highest in “top-of-mind awareness” among the nonprofits in Madison—almost double the ratings for the American Red Cross and the Salvation Army. Howard concludes, “We’re now talking to people about what we’ve accomplished... and I think it’s creating the value proposition we need to stay relevant.”

Overall, United Way of Dane County has transformed by thinking about their mission and goals in a different way. Now their work is about engaging the community around the issues that matter most, aligning resources and partnerships, and delivering results at a community scale. The success realized thus far has given United Way the resolve to take the risks necessary to create further community impact in the future.

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