REPORT FROM THE U.S. TASK FORCE: WORKING TOGETHER TO DRIVE RESULTS ACROSS OUR COMMUNITIES
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VISION

United Way envisions a world where all individuals and families achieve their human potential through education, financial stability and healthy lives.

Imagine a world that fosters hope and opportunity for everyone. A world where...

- All children receive a quality education that offers a pathway to a brighter tomorrow.
- The cycle of poverty and financial dependence ends, and productive livelihoods begin for even the most disadvantaged.
- Everyone receives effective health care that improves quality of life.
- Communities not only set significant and measurable goals to advance these fundamental elements of human development, but achieve them.
MISSION

To improve lives by mobilizing the caring power of communities around the world to advance the common good.

To do this we will...

- Ignite a **worldwide social movement**, and thereby mobilize millions to action – to give, advocate and volunteer to improve the conditions in which they live.

- Galvanize and connect all sectors of society – individuals, businesses, nonprofit organizations and governments – to create **long-term social change** that produces healthy, well-educated and financially-stable individuals and families.

- Raise, invest and leverage billions of **funds annually in philanthropic contributions** to create and support innovative programs and approaches to generate sustained impact in local communities.

- Hold ourselves accountable to this cause through our steadfast commitment to continually measure – in real terms – **improvement in education, income and health**.
LETTER FROM BRIAN A. GALLAGHER AND MERL E. WASCHLER

September 2012

Dear United Way Volunteers, Professionals and Partners,

Over the past two years, the U.S. Task Force on United Way’s Economic Model & Growth worked diligently to develop a plan to reshape and transform our culture, model, strategies and relationships. The Task Force believes strongly that United Way can—and must—make significant contributions to the issues of our time. Rather than accept the status quo, the Task Force believes United Way must be a catalyst for change and a champion of progress, both within our network and across the nation.

In this report, you will learn more about the opportunities, challenges, pressures and motivations facing our network and the communities we serve that prompted the Task Force to:

• Develop a more integrated operating model to accelerate community impact at local and national levels and drive results across our education, income and health platforms.

• Forge stronger, deeper and more consistent relationships with our top corporate partners (especially Fortune 500 companies) to drive engagement and accelerate progress in communities across the United States.

• Create a new model to organize, serve and connect United Way organizations that replaces the decades-old Metro classification system based on funds raised. This will provide a platform for more formal partnerships of network members to address specific performance challenges and generate innovative solutions.
• Develop a network-wide talent management strategy—from recruitment through succession with emphasis on core competencies and leadership requirements—to ensure that the United Way people strategy aligns with our business strategy.

• Create a new cultural foundation that underpins all of the efforts, with emphasis on interdependence, leadership and mutual accountability.

Given the complexity and urgency of this period, the U.S. Task Force seeks to move United Way to a high-performing, interdependent network that drives transformative change across our nation, benefiting communities everywhere. The necessary steps for such growth are contained in the following pages of this report.

Thanks for all you do every day on behalf of United Way. We look forward to working with you in the months and years ahead as we ambitiously move forward together.

Best Regards,

Brian A. Gallagher
President and CEO
United Way Worldwide

Merl E. Waschler
President and CEO
Valley of the Sun United Way
Chair, U.S. Task Force
PREFACE

In June 2011, the U.S. Task Force on United Way’s Economic Model & Growth issued a case for change and a call to action to drive United Way’s growth and performance in the future. The Task Force outlined four recommendations:

1. Commit to and invest in becoming a **LEADING CATALYST FOR SOCIAL CHANGE** in education, income and health to achieve the Goals for the Common Good by 2018.

2. Recharge and expand **PRIVATE-SECTOR RELATIONSHIPS AND FUNDING** from corporations and individuals to fuel United Way’s social change.

3. Strengthen the network by **REDEFINING ROLES AND RESPONSIBILITIES** across local, state and national members to increase effectiveness and efficiency.

4. Create **VOLUNTARY PARTNERSHIPS OF NETWORK MEMBERS** to accelerate the transformation through shared decisions, resources and accountability.

The Task Force also identified five cultural attributes that are essential for the future success of the United Way network: **interdependence, alignment, leadership, differentiation and customization** and **mutual accountability**. Moving forward, these attributes will provide the cultural foundation for a new way of working together as a network.

Over the past year, the Task Force has continued working, with a focus on translating these recommendations and cultural requirements into a series of specific initiatives that are designed to accelerate United Way’s transformation and position the network to more effectively drive social impact both locally and nationally.

This final report of the Task Force provides an overview of these initiatives and outlines the pathway forward.
THE CHALLENGE: TROUBLING TRENDS CONFRONT OUR COUNTRY

United Way improves lives by mobilizing the caring power of communities around the world to advance the common good. United Way is the largest privately-funded nonprofit in the world with 125 years of community organization and leadership experience in the United States and worldwide activity dating back more than 80 years.

With this success comes the opportunity and the obligation to help address and overcome the many troubling trends and conditions confronting our nation, including struggling education systems, personal and family financial instability and critical health risks. Consider a few figures:

- 1 in 5 children in the U.S. lives in poverty—more than 16 million children in total.
- 1 in 4 young people do not graduate from high school each year, severely impacting their potential for life success. This increases to 1 in 2 for minority youth in many urban areas.
- Persistently high unemployment rates affect the stability of families and communities. Unemployment rates are higher than the national average among African-Americans and more than double the average in some communities.
- More than 35 percent of American adults—and 17 percent of children and adolescents—are obese, dramatically increasing their risk for heart disease, stroke and diabetes and contributing to the healthcare crisis in our country.

Despite the impressive and laudable efforts of many—both within the United Way network and across sectors—our nation is not making the progress needed to overcome these societal challenges. There have been pockets of success in communities across our country, but too often these local victories remain invisible beyond the community level, never achieving the scale needed to drive national change.

With more than 1,200 United Way organizations covering 95 percent of the nation, United Way is uniquely positioned to identify, promote and scale successful local solutions to the national level. We have a long history of taking a single idea, an isolated strategy or an under-resourced breakthrough and moving it across America. **O UR FUTURE SUCCESS REQUIRES US TO BUILD UPON THIS EXPERIENCE AND EVOLVE OUR NETWORK’S OPERATING MODEL TO MEET THE INCREASINGLY COMPLEX NEEDS AND CHALLENGES OUR COMMUNITIES FACE TODAY.**
The common good response begins with us.

THE RESPONSE:
A COMMON GOOD RESPONSE FOR COMMON GOOD RESULTS

At the heart of United Way’s vision is a community of interconnected individuals, groups and institutions working together for the benefit of all. This sense of collective interest is what we mean by the common good. It’s United Way’s point of view that we will only realize the results we are seeking for our nation when everyone has a stake in creating healthier and more prosperous communities.

The United Way network currently acts as a decentralized set of independent organizations connected by mission, brand and knowledge sharing. Our communities, partners and funders need us to evolve in two fundamental ways: 1) to serve as the backbone organization at a local level that connects different groups, networks and sectors together to solve shared problems and 2) to function as a national network of interdependent organizations that work together to drive large-scale change and are accountable to each other for performance and results around a shared outcome: advancing the common good by creating opportunities for a better life for all, focusing on education, income and health – the building blocks for a good quality life.
The gaps in each of these social issue areas are at historic levels. The problems require an urgent response and unrelenting focus. United Way plays a critical role in advancing education, income and health outcomes in our country, but we recognize that no single individual, organization or sector can tackle these complex social issues on their own. Strong leadership is needed to guide the collective efforts of individuals and institutions from across all sectors, working together toward a common purpose. United Way is positioned to provide this leadership.

United Way has the unique ability to work across sectors, issues and communities to address challenges, generate solutions and drive progress. We can provide the leadership and mobilizing force needed to ensure that passionate people and organizations have a means to bring their resources and expertise together in order to get things done.

For both our nation and our network, the status quo is not acceptable. Through the commitment and action of individuals, organizations and groups coupled with the collective power of the United Way network, we can envision a world where all children receive a quality education, the cycle of poverty and financial dependency ends, and everyone can live healthy and fulfilled lives.
While we aspire to a shared destination, as a network of independent organizations each United Way has historically, and appropriately, pursued its own strategy to get there. While some United Ways have experienced great success in their individual communities, as a U.S. network we have not achieved the large-scale change needed in our nation. In order to realize the Goals for the Common Good by 2018—and to become the backbone organization locally and interdependent network nationally—it is imperative that we all work together around the following four Big Moves so that together we can drive change in education, income and health, create opportunity for all Americans, and ensure the competitiveness and growth of our network.
Each of these Big Moves fits together. They are described in greater detail in the pages that follow.

**BIG MOVE #1**
**FROM INDIVIDUAL TO NETWORK IMPACT**

Create the environment for success by building stronger public engagement, influencing public policy, informing practice, collaborating with partners and supporters, and leveraging resources in support of local and national strategies. Together, through a collective impact approach, the individual efforts of each United Way can contribute to a shared social movement to drive large-scale change. Strategically build a critical mass of communities committed to a common agenda. Place a priority focus on those United Way communities whose engagement is critical for achieving the national goals while providing opportunities for all United Ways to contribute. Develop and implement shared strategies and common metrics across United Way communities and adopt a more integrated approach to advancing our work across the network to drive impact locally and nationally.

**BIG MOVE #2**
**FROM WORKPLACE CAMPAIGNS ONLY TO STRATEGIC PHILANTHROPIC PARTNER OF CHOICE**

Build upon the traditional workplace campaign to establish deeper relationships with corporate partners through an expanded platform that provides the company and its employees with meaningful opportunities to give, advocate and volunteer. Adopt a new approach to corporate engagement, with tiered levels of service based on the alignment of the company’s and United Way’s community impact goals. Create a more consistent experience for our corporate partners across geographies by developing accountability plans that clearly define shared strategies and metrics, as well as the roles and responsibilities between the companies, headquarter United Ways, United Way Worldwide and local United Ways in key markets.
BIG MOVE #3
FROM METRO SIZE TO A NEW ORGANIZING FRAMEWORK FOR WORKING TOGETHER

Move beyond the revenue-based Metro classification system to a new framework for organizing the United Way network based on a United Way’s ability to drive community impact and execute the business model, on its organizational capacity and on its community profile. Provide a basic set of supports and services needed to advance core aspects of our work to all United Ways. In addition, offer differentiated supports and services tailored to meet United Ways where they are in their transformation and community impact strategies. Create new, more formal structures—called Partnerships—to support collaboration among small groups of United Ways that choose to work together to solve specific performance challenges they face in their communities.

BIG MOVE #4
FROM A PLACE TO WORK TO THE MISSION OF CHOICE

Become a beacon for talent and leadership by implementing a network-wide talent management strategy—from recruitment through succession—based on a common set of core competencies for United Way professionals. Begin with a focus on CEO and Board development, with an emphasis on enhancing the leadership capacity needed to achieve excellence on all of United Way's strategies and goals. Given the critical importance of leadership across our network, we must promote the importance of building organizational capacity by developing the next generation of leaders, implementing succession planning and providing assistance for anticipating and navigating leadership transitions to all United Ways, regardless of size.
1. Create the environment for success by building stronger public engagement, influencing public policy, informing practice, collaborating with partners and supporters, and leveraging resources in support of the national strategies.

2. Strategically build a critical mass of communities committed to a common agenda. Place a priority focus on United Way communities whose engagement is critical for achieving the national goals while providing opportunities for all United Ways to contribute.

3. Develop and implement shared strategies and common metrics across United Way communities, and adopt a more integrated approach to advancing our work across the network in order to drive impact locally and nationally.
United Way’s Goals for the Common Good provide a clear definition of success. We have committed to providing leadership for the nation to:

- Cut by half the number of young people who drop out of high school.
- Cut by half the number of lower-income working families that lack financial stability.
- Increase by a third the number of youth and adults who are healthy and avoid risky behaviors.

Across the nation, United Ways have been mobilizing their communities and making an impact on important education, income and health issues. While some United Ways have experienced success in their individual communities, we as a network have not achieved the large-scale change needed in our nation.

To achieve the Goals for the Common Good by 2018, we must move beyond individual community efforts to network-wide impact.

**HOW WE WILL DO IT**

1. Create the environment for success by building stronger public engagement, influencing public policy, informing practice, collaborating with partners and supporters, and leveraging resources in support of the national strategies.

Even the most effective, evidence-based strategies for driving social change will fail if a supportive environment for their success is not in place. Leveraging the trusted role it plays as a backbone organization in communities across the country and at the national level, United Way can provide the leadership needed to support our collective success. To do this, United Way as a network will:

- Build public urgency to care about the issue and act. United Way can engage tens of thousands of people in community conversations around our education, income and health goals. Using what we learn, we can develop and drive common messages to garner national support and build a sense of urgency to act.
- Influence policy and practice through advocacy and coalition building. Through direct action and in coalition with others, United Way can use its voice to advocate for changes to policies and practices in order to create the conditions needed for success. Local and state policy efforts, aligned with the national policy agenda and priorities, will be one of the most important tools available to United Way.
- Engage funding partners. To drive a scalable and sustainable national movement, substantial investments will be needed. United Ways involved in the initiatives will work collectively to engage local, regional, and national funding partners, including government agencies, national foundations and major corporations in supporting our collective work.
• Build strategic partnerships to advance our goals. Many local, state and national partners can help implement the national strategies and contribute to achieving the Goals for the Common Good by 2018. Working with educators, parents, faith leaders, major employers, labor leaders and others to create and sustain lasting change will be critical to United Way's success.

• Build a cadre of supporters from all walks of life. United Way will work collectively to enlist and enroll everyone in the cause. United Ways will recruit individuals and organizations—from across the community—that bring the passion, resources and expertise to get things done, while helping to create a national network of individuals ready and willing to give, advocate and volunteer to advance our shared goals and strategies.
2. Strategically build a critical mass of communities committed to a common agenda. Place a priority focus on those United Way communities whose engagement is critical for achieving the national goals while providing opportunities for all United Ways to contribute.

Reaching our goals will require a critical mass of mobilized United Ways that share the need to make change within their communities; the willingness to align their efforts with the national strategies and work collaboratively with other United Ways and partners to drive change locally and nationally; and the talent, partnerships, resources and organizational capacity needed to drive the shared strategies in their local communities. It is these United Ways that will shift us from working individually to a collective group capable of driving a social movement.

Within our network are communities whose involvement is critical to helping large numbers of youth graduate, families become financially stable and individuals live healthier. These communities may have large populations in need, as well as critical partners, stakeholders, advocates and resources that will fuel our effort. All United Ways can make important contributions that deepen our network-wide results.

UNITED WAY COMMUNITIES WITH THE HIGHEST NUMBER OF HIGH SCHOOL DROPOUTS FROM LOW PERFORMING SCHOOLS: 2009–2010
3. Develop and implement shared strategies and common metrics across United Way communities, and adopt a more integrated approach to advancing our work across the network in order to drive impact locally and nationally.

This critical mass of United Ways will need to work toward a common purpose through a shared strategic agenda with shared expectations and levels of accountability. This will require:

- Alignment around United Way’s prioritized strategies and agreement on a common set of metrics that will enable United Way to drive action and measure success in a consistent and aligned manner across the network.
- Implementation of activities in local communities to advance the national strategies, collecting early indicators of success, attracting funding and inspiring other communities to get involved through aligned and coordinated give, advocate and volunteer activities.
- Building a discipline of knowledge and best practice sharing across the network with United Ways working together as active teachers and learners through peer-to-peer collaboration tools.
- Creating a level of mutual accountability that drives our network toward success through collaborative agreements with organizations and companies, formal partnerships with each other, strategic grants and establishment of key performance indicators.

CONCLUSION

The complex challenges we face in our communities and our nation require disparate individuals, organizations and groups to join together to solve the shared problems we are confronting.

When appropriate, using its trusted role as a backbone organization, United Way has the opportunity to bring these groups together—across sectors, issues, demographics and other historical divides. It is our responsibility and our obligation to ensure that individuals and organizations have a means to bring their passion, expertise and resources together to improve conditions within their communities and throughout our nation.

The same logic holds true for the United Way network. The individual efforts and successes of United Ways need to bring about the large-scale change we want for our nation. Our future success requires us to evolve from a group of independent organizations pursuing local impact to a network of interdependent organizations pursuing local and national impact.

A LOCAL PERSPECTIVE

Community impact is a result of thoughtful collaboration that starts internally and focuses externally. If we are to achieve real and substantial change, we need regional and national partners who will take the journey with us. There is no win for a company with multiple United Ways to achieve a little in each market...or for multiple United Ways to achieve a little in each market. The real impact is in the jointly created, implemented, funded and managed strategy that has broad and meaningful impact for the funder, United Way and the community to claim.

We are still very much a local movement, but to create local change, we need to embrace our potential for national leadership where we can achieve great things for our constituents and our communities. If we cannot do this, we will have nothing to claim as our own—from a network perspective—and ultimately become less than we can be.

Angela Dabney, Senior Vice President, Resource Development, United Way of Central Indiana (Indianapolis, IN)
BIG MOVE #2
FROM WORKPLACE CAMPAIGNS ONLY
TO STRATEGIC PHILANTHROPIC
PARTNER OF CHOICE

1. Build upon the traditional workplace campaigns to establish deeper relationships with corporate partners through an expanded platform that provides the company and its employees with meaningful opportunities to give, advocate and volunteer.

2. Adopt a new approach to corporate engagement with tiered levels of service based on the alignment of the company’s and United Way’s community impact goals.

3. Grow our top- and middle-tier relationships by creating more consistent experience for our corporate partners across geographies through the development of shared strategies and metrics that are held together by accountability plans between the companies, headquarter United Ways, United Way Worldwide and local United Ways in key markets.
One of the greatest assets of United Way is our strong relationship with the private sector. Thousands of companies of all sizes support our efforts, year-in and year-out, contributing their time, funds and leadership to help advance the common good. United Way’s strong, cooperative and long-standing relationship with Labor also generates significant value and results that benefit families and communities across the country.

At the heart of our relationship with the private sector are the Fortune 500 companies. Together with their employees, the 280 Fortune 500 companies that are current United Way partners contribute more than $1.2 billion in funds and tens of thousands of volunteer hours annually.

Our corporate partners have spoken clearly. In interviews with more than 50 Fortune 500 companies, the following themes emerged about their relationship with United Way:

- Companies want a new approach to corporate engagement that better aligns with their own community impact goals, corporate social responsibility programs and cause marketing efforts.
- Companies want more consistent service and relationship management across their multiple geographies.
- Companies want to grow volunteer engagement opportunities for their employees and increase the number of skill-based volunteer opportunities available.
- Companies want improved metrics and reporting from United Way, especially across multiple geographies.
- Companies are interested in partnering worldwide with United Way, but both the companies and the local United Ways are unsure how to access the worldwide network.
Urgency is needed because our supporters within these companies are feeling increased pressure from their boards, chief executives, corporate social responsibility leaders and employees to demonstrate results from their philanthropic investments. If increased expectations aren’t met, companies will have to look outside United Way for a new philanthropic partner.

United Way’s future depends on the strength of our corporate relationships. We must secure, deepen and grow our engagement within existing companies—and expand into the more than 200 Fortune 500 companies with whom we do not currently have relationships.

**HOW WE WILL DO IT**

To meet our corporate partners’ needs and to develop stronger relationships with them, we must build upon the traditional workplace campaign focus to better understand companies’ business and corporate social responsibility goals. Where alignment exists with United Way’s own goals, we must work more deeply and effectively with our corporate partners to achieve the impact we collectively desire. We must become the strategic philanthropic partner of choice for companies with an interest in creating social and economic opportunity that aligns with United Way’s goals locally, nationally and worldwide. Similar to Big Move #1, we need to build a cadre of supporters within these companies whose passion and expertise will create a national movement of individuals ready and willing to give, advocate and volunteer to advance shared goals and strategies that deliver results.

1. **Build upon the traditional workplace campaign to establish deeper relationships with corporate partners through an expanded platform that provides the company and its employees with meaningful opportunities to give, advocate and volunteer.**

In order to create true partnerships with companies, United Way needs to meet their philanthropic needs and interests beyond traditional employee giving campaigns. After extensive interviews and research with companies, the following key areas for corporate engagement emerged:

- **CORPORATE SOCIAL RESPONSIBILITY**: Companies are looking for partners to help them create, execute and monitor programs that drive both community change and business interests.
- **EMPLOYEE ENGAGEMENT**: Companies want to build upon the traditional employee giving campaign and are looking for additional support for volunteerism—specifically skills-based volunteering, year-round employee engagement and employee education.
- **CONSUMER AND STAKEHOLDER ENGAGEMENT**: Companies are looking for support in communication, recognition and public relationships, as well as corporate sponsorship and cause marketing opportunities.
- **DONOR STEWARDSHIP**: Companies expect all of this support to be effectively measured with strong reporting and metrics, technical support and seamless and efficient pledge processing.
CORPORATE ENGAGEMENT PLATFORM

CORPORATION

CORPORATE SOCIAL RESPONSIBILITY
- Development of Collaborative Strategy
- Community Needs Assessments
- Issue Advice & Counsel
- Impact Products
- Advocacy
- International Donor Advised Giving (IDAG)

EMPLOYEE ENGAGEMENT
- Volunteer Program and Support
- Employee Education/Year-Round Engagement
- Skills-Based Volunteering
- Giving Campaigns
- Board Involvement

CONSUMERS AND STAKEHOLDERS
- Communication, Recognition and Public Relations
- Corporate Sponsorship
- Cause Marketing
- Licensing
- Business Partnerships

Strong Donor Stewardship
Robust Reporting and Metrics
Efficient Pledge Processing
Strong Relationship Management
Consistent Pricing
2. Adopt a new approach to corporate engagement with tiered levels of service based on the alignment of the company’s and United Way’s community impact goals.

To get the greatest return from our corporate relationships, we must simplify our processes and prioritize our time and resources on the companies that share the same community impact goals. To do so, we will move away from our current fragmented approach and establish a single platform for corporate engagement for all companies.

Within this platform, we will have multiple tiers of service based on alignment between the company’s and United Way’s community impact goals. Additionally, we will create three approaches to relationship management based on the preferences and structure of the company we are supporting and the capacity of the United Ways involved. In some cases, this will mean that the headquarters United Way takes the lead; in others, United Way Worldwide will lead; and in a small number of cases, a key market will take the lead on behalf of the network.

- **THE TOP TIER:** The top tier of service will be provided to a limited number of companies that are highly aligned with United Way’s community impact agenda, either through major initiatives or undesignated funds. This tier of companies will receive the highest level of recognition and support across the network, even in communities where they are not a top partner.

  Network-wide strategy plans for each top-tier company will be co-created by the company, the headquarters United Way, United Way Worldwide and United Ways in key company markets. These plans will identify our collective goals, define roles and responsibilities across the network and within the company, and establish how progress will be measured. Dedicated resources from the network will build out the relationships in the years ahead.

- **THE MIDDLE TIER:** Most Fortune 500 companies will fall into the middle tier—companies whose community impact goals support United Way’s education, income and health goals, but that are not yet ready to fully partner with the United Way network. These companies will be served in a similar manner to the group above, including the co-creation of network-wide strategic plans to establish goals, define roles and responsibilities and drive execution but will have fewer dedicated resources assigned.

- **THE BASE:** While many companies will be aligned with United Ways goals, some will choose to focus their resources in other areas. Companies whose philanthropic goals are not aligned with United Way’s will receive targeted support from the United Way network. It is our hope and expectation that, over time, companies will move up to higher tiers of services based on the successes enjoyed by the top- and middle-tier companies and the support of their local United Way.
3. Grow our top- and middle-tier relationships by creating a more consistent experience for our corporate partners across geographies through the development of shared strategies and metrics that are held together by shared accountability plans between the companies, headquarter United Ways, United Way Worldwide and United Ways in key markets.

Network-wide strategic plans for each top- and middle-tier company will be co-created by the company, the headquarter United Way, United Way Worldwide and local United Ways in key company markets. These plans will define our collective strategies and goals and guide execution by:

- Defining roles and responsibilities across the network and for the company.
- Articulating the products and services United Ways will provide, as well as which United Way will provide each service.
- Determining the level of resources from the company and United Way.
- Establishing how progress will be measured and monitored.

CONCLUSION

Fortune 500 companies are increasingly looking for United Way to be their strategic philanthropic partner, not just the platform for their workplace giving campaigns. These companies want to be part of the solution to the challenges facing our communities and our nation.

Through its role as backbone organization, United Way can help connect the private sector and the social sector, providing opportunities for companies and their employees to give, advocate and volunteer in support of our shared community impact goals.

To be an effective partner to the Fortune 500, we must provide more consistent service, relationship management and impact reporting across their multiple geographies. This will require United Way to work together in a more interdependent way, balancing individual interests with the best interests of the network as a whole and holding ourselves mutually accountable for success.

By aligning companies’ goals with those of United Way, we can deliver a highly valued experience to our corporate partners and drive community impact—locally, nationally and worldwide—together.
A LOCAL PERSPECTIVE

We often look at companies as sources of funding for the great work we do in the community. While they are certainly great funding partners, they can be so much more. The key is for them to clearly understand the value proposition in entering into a partnership with us. Our experience here in Detroit with General Motors has made this crystal clear. Once we better understood their goals and co-created a comprehensive plan around those goals, we were able to move from a good, but transaction-based relationship, to a true partnership. Creating and executing this partnership wasn’t easy. It has taken significant resources from many parts of our organization, but the impact on our community has been tremendous. I love that the Fortune 500 work is really focused on building more partnerships like ours with GM and growing them across geographies. It is going to be a lot of work for each of us, but the potential for impact in our nation is amazing.

_Dona Ponepinto, Vice President, Basic Needs & Financial Stability, United Way for Southeastern Michigan (Detroit, MI)_

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One of the greatest assets of United Way is our strong relationship with the private sector.
BIG MOVE #3
FROM METRO SIZE TO A NEW ORGANIZING FRAMEWORK FOR WORKING TOGETHER

1. Move beyond the revenue-based Metro classification system to a new framework for organizing the United Way network based on a United Way’s ability to drive community impact and execute on the United Way business model, on its organizational capacity and on its community profile.

2. Offer a basic set of supports and services to all United Ways, along with differentiated supports and services tailored to meet United Ways where they are in their transformation and community impact strategies.

3. Create a new, more formal structure—called Partnerships—to support collaboration among small groups of United Ways that choose to work together to solve specific network performance challenges they face in their communities.
For many years, the United Way network in the United States has been differentiated by one factor—dollars raised. The revenue-based Metro size classification system has not kept pace with United Way’s changing business model and does not take into account a United Way’s effectiveness in community impact, its organizational capacity, or the profile of its community, including population size and corporate presence.

To achieve the results we desire for our nation and to support this new way of working together, a different model to organize the network needs to:

- Assist groups of United Ways with similar profiles in progressing along the community impact and business model continuum by providing the basic and differentiated supports and services that address their needs.
- Support collaboration and collective action among groups of United Ways around critical efforts such as talent, corporate partnerships and strategic community impact areas.
- Position each United Way—and the network as a whole—to increase impact and advance both our local and collective social and economic success agendas.

**HOW WE WILL DO IT**

1. Adopt and implement a new organizing framework.

The new organizing framework will move the United Way network beyond the Metro size approach to a model that is based upon two criteria:

- The United Way’s ability to execute the United Way business model and drive community impact (as measured by the Business Performance Index Survey); and
- The United Way’s influence and organizational capacity (based on criteria such as population size, corporate presence and staff size).

The organizing framework will enable United Ways to properly identify their position within the new model; will support more targeted programs and services to clusters of United Ways with similar foci or characteristics; and will better facilitate collaboration and collective action among United Ways—within and across segments—based on common interests and priority needs.
2. Offer a basic set of services and supports to all United Ways, along with differentiated supports and services in priority areas.

- A basic set of supports and services linked to core aspects of our work and the United Way business model will continue to be provided to all United Ways.
- In addition, the organizing framework will enable United Way to move from a one-size-fits-all approach to a more targeted approach providing differentiated supports and services to groups of United Ways with similar needs or interests. This strategic shift will help these United Ways build their capacity to implement the shared national strategies, strengthen priority aspects of the United Way business model and advance their local social- and economic-success agendas.
- The organizing framework also establishes a platform upon which groups of United Ways can join together to solve shared performance challenges they are facing in their own local communities, but that cut across any single geography.
3. Create a new, more formal structure—called Partnerships—to support collaboration among small groups of United Ways that choose to work together to solve specific performance challenges they face in their communities.

The U.S. Task Force envisions network members joining together in partnership to accelerate our local and national impact, so we are capable of reaching our bold education, income and health goals. Such partnerships will provide new and stronger ways of engaging and growing large strategic relationships that go beyond the geography and reach of individual United Ways. It will also provide a way to scale initiatives and investments that have significant value to individual United Ways, as well as to the national network.

The new Partnership structure builds off of other highly successful collaborative efforts United Way already has in place, such as United Way Mobilization Groups. The key difference is that these Partnerships shift us from achieving local community impact to network-wide results, from independent to network action, and from individual to mutual accountability for success.

Over time, success of the Partnership model will be instrumental in shifting away from the traditional membership model to a true horizontal network with members leading at the local, state and national levels. Partners will be accountable to each other for both local and network-wide impact in achieving results in the community, securing resource growth and working to strengthen the leadership of the network.

While the partnership model may start with the commitment of a small group of United Ways, their Boards and communities, its ultimate goal is to help create a future that will involve all network members in service to United Way’s mission and results.

A CLOSER LOOK

At the outset, three Partnerships will be established to drive this new way of working together and begin working on some of the most critical issues facing our network today:

- **THE GRADUATION INITIATIVE PARTNERSHIP**: Each year one million youth fail to graduate from high school on time and even more leave high school unprepared for college, work and life. United Way must join together with key partners and stakeholders to drive progress toward the common goal of ensuring that youth graduate and leave high school prepared for college and careers. The Graduation Initiative Partners will implement United Way’s prioritized national strategies in an aligned manner and provide a proof of concept benefiting students, schools, families and communities.

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• **THE CORPORATE ENGAGEMENT PARTNERSHIP:** As companies expand their corporate social responsibility efforts, they seek a strategic philanthropic partner that can drive impact on local, national and worldwide levels, while also engaging employees and consumers in meaningful ways. United Ways must join together to deepen their capacity and deliver more consistently. The Corporate Engagement Partners will expand our corporate engagement platform, revive lost and stagnant corporate partnerships and develop relationships with untapped industries and companies.

• **THE TALENT MANAGEMENT PARTNERSHIP:** As United Way aligns its people strategy to its business strategy, the network must join together to build out the relationships, competencies and programs that are central to achieving our shared goals and our aspirations. The Talent Management Partners will focus on a range of opportunities, such as increasing diversity in leadership roles, retaining and developing staff in key functions (such as Community Impact and Resource Development professionals) and engaging Boards in expanded ways that drive our local and national performance.

**PARTNERSHIPS IN ACTION**

To launch the Partnerships, United Ways will apply through a formal application and selection process managed by a review committee made up of Task Force members and United Way Worldwide executive staff. Areas will be developed by the Task Force and will serve as the basis for this process. The specific performance challenges will be refined and approved by the members of the partnership. Participation in the Partnerships requires resource commitments and involvement in a 14-month Partnering Program to include training, convenings, coaching and technical assistance. All Partners will benefit from the increased capacity they will gain by working together and from resources raised in support of their efforts.

To ensure alignment and identify common interests across the groups, a governance and decision-making structure for the Partnerships will be established, with the following elements:

• Each **PARTNERSHIP** will be made up of a series of **COMPACTS**—small groups of United Ways that agree to work together to solve a specific, performance-based challenge for the partnership. These challenges will be ones that cross geography and require shared action, accountability and performance to solve. Their job is to find feasible and scalable solutions to these challenges for the benefit of the Partnerships and the larger network.

• A **PARTNERSHIP LEADERSHIP GROUP** will be created within each Partnership that includes United Way Worldwide. The Partnership Leadership Group will support the exchange of information between members of the partnership that fall into different compacts. This leadership group will address cross-compact issues and provide oversight for the collective body of work within that Partnership.

• A **CROSS-PARTNERSHIP LEADERSHIP GROUP** will be established to address issues that impact more than one of the three Partnerships. This group will be comprised of the three Partnerships chairs, the United Way U.S.A. President and two at-large appointees named by the U.S.A. President.
With support from United Way Worldwide, the members of each compact will decide how to address their specific performance challenges, including decisions around strategy, metrics, relationship management, product and service offerings and even the distribution of resources.

**PARTNERSHIPS IN ACTION**
CONCLUSION

United Way’s evolving and expanded operating model—focused on community impact, distributed leadership and mutual accountability—requires groups of United Ways working together to effectively advance and scale our efforts. We will organize in ways that recognize the range of needs and opportunities within our network and our communities. The new framework will ensure that United Way organizations receive the supports and services that will drive their business performance and future growth.

In addition, Partnerships will allow United Ways to perform together against targeted challenges with solutions shared and scaled within the network. In many ways, the Partnerships represent an important mechanism to bring the Task Force’s vision to life. It is where strategy meets culture as we move forward together to solve some of the toughest problems facing our communities and our network.

Partnerships will allow United Ways to perform together against targeted challenges with solutions shared and scaled within the network.
When our United Way looks at the current classification Metro system, we don’t feel that it truly reflects our work. We understand that fundraising is an important part of what we do, but feel that our true value lies in how we are using those resources to change the social fabric of our community. The new Business Performance Matrix gives a local United Way the opportunity to detail their work in their communities and describe their position as it pertains to the United Way network’s business model. This new organizing framework allows United Ways to showcase their work and is much more reflective of what we strive to do.

*Carol Burger, President and CEO, United Way of the Capital Area (Jackson, MS)*
BIG MOVE #4
FROM A PLACE TO WORK TO THE MISSION OF CHOICE

1. Implement a network-wide talent management strategy—from recruitment through succession—based on a common set of core competencies for all United Way professionals.

2. Focus on CEO and Board development, with an emphasis on enhancing the leadership capacity needed to achieve excellence on all of United Way’s strategies and goals.

3. Promote the importance of developing the next generation of leaders and implementing succession planning for all United Ways regardless of size, and provide assistance to United Ways to successfully anticipate and navigate leadership transitions.
Talent is the key lever in building the new United Way and in leading the network successfully through this transformation. Our ability to successfully execute the United Way business model and achieve our mission depends on how well we recruit, develop and retain diverse and high-quality professionals who can perform and lead with excellence.

Through the strategic management of our talent, United Way will be better able to strategically plan and deploy our workforce, prioritize and properly invest resources in closing skill gaps, align staff performance with strategic goals and develop succession plans for critical roles. We must align our people strategy with our business strategy.
HOW WE WILL DO IT

1. Implement a network-wide talent management strategy—from recruitment through succession—based on a common set of core competencies for all United Way professionals.

To become a beacon for talent and leadership across sectors, we must implement a network-wide talent management strategy. The strategy will ensure that we get talented people with the right competencies, in the right places, doing the right work to drive and sustain the United Way business model and progress in communities worldwide.

United Way’s talent management strategy is grounded in five strategic pillars that inform the goals and guide execution of the strategy. They are fully integrated into the talent management practices on how United Way will recruit new employees, provide development and learning opportunities, retain and engage top-performing employees and plan effectively for succession.

The five strategic pillars of United Way’s talent management strategy are:

- Position United Way as the MISSION OF CHOICE for diverse, qualified, high-quality professionals wanting to advance the common good in local communities worldwide.
- Adopt—and commit to—a set of CORE COMPETENCIES on which we will base all talent management activities (e.g. recruitment, learning and development curriculum, performance evaluations, staff, leadership and CEO development, succession planning, etc.).
- Leverage RELATIONSHIPS as a key asset in driving talent development and engagement. Beyond classrooms, tools and textbooks, today’s professionals thrive through relationships with mentors, coaches and peers. They grow through participating in leadership cohorts and they are motivated by connecting—virtually, in person, one-on-one, in groups— with others within the United Way network and with external partners and constituents.
- Proactively and intentionally enhance the DIVERSITY of our leadership and staff across all functions and levels across the United Way network.
- Instill the need for SUCCESSION PLANNING for all United Ways and for all key leadership positions to ensure strategic and smooth transitions for planned or unexpected changes in leadership.

The right talent will drive performance and results against the toughest challenges.
United Way’s talent management strategy will ensure that we have shared strategies and processes in place across the network to achieve the following talent management goals over the next three to five years:

<table>
<thead>
<tr>
<th>TALENT STRATEGY</th>
<th>GOAL</th>
</tr>
</thead>
<tbody>
<tr>
<td>Recruitment</td>
<td>Create and implement recruitment and hiring processes to attract highly competent employees, and proactively build a pipeline of high-quality diverse candidates for the United Way network.</td>
</tr>
<tr>
<td>Development</td>
<td>Develop and deliver high-quality learning and development opportunities to increase capacity and performance of leaders and professionals as critical to the ability to deliver on the mission.</td>
</tr>
<tr>
<td>Retention and Engagement</td>
<td>Create robust retention and engagement opportunities that will ignite and build results-oriented performance and enable leaders and professionals to build careers and relationships locally, nationally and worldwide.</td>
</tr>
<tr>
<td>Succession</td>
<td>Secure an ongoing source of well trained, experienced, high-quality, diverse and motivated professionals who are ready and able to step into key positions as needed.</td>
</tr>
</tbody>
</table>

The talent management strategy is based on a common set of competencies (mission focused, relationship oriented, collaborator, results driven and brand steward) which will ensure that we get, grow and retain the right people who have the skills, traits and behaviors that are fundamental to our mission and strategic direction. When adopted and implemented by United Ways, these competencies will provide consistency and alignment of staff performance across the network.
We believe that our people, ignited and supported by a robust and sustainable talent strategy, will improve people’s lives and advance the common good for all. Our talent is among our greatest assets on par with our reputation, and it should be developed and protected with passion. Creating the most talented workforce will allow us to achieve our goals and mission.
2. Focus on CEO and Board development, with an emphasis on enhancing the leadership capacity needed to achieve excellence on all United Way strategies and goals.

Creating the changes to which our communities aspire requires a different type and level of leadership from United Way.

Communities are searching for leaders who will engage organizations, businesses, government institutions and everyday individuals to collectively address education, income and health issues and to drive systemic and measurable long-term impact.

Advancing United Way’s business model and community impact strategies in the current economic environment demands collaboration, innovation, strong business acumen and leaders who think worldwide, value diversity and are willing to act boldly—taking reasoned risks to find new and more effective ways to promote human progress.

To prepare United Way Board and staff leaders for these new roles, United Way will:

- **EMBRACE A NEW SET OF COMPETENCIES FOR CEOs**—visionary, team builder, outward turning, business acumen and network-oriented—and provide executive-level professional development and engagement opportunities to support chief executives in their career growth.

- **EMBRACE A NEW SET OF COMPETENCIES FOR BOARDS**—strategic thinker, builder of leaders, community advocate, future-focused and steward of brand and trust—and provide executive-level development and engagement opportunities to strengthen Board capacity.

3. Promote the importance of developing the next generation of leaders and implementing succession planning for all United Ways, regardless of size, and provide assistance to United Ways to successfully anticipate and navigate leadership transitions.

To prepare for leadership transitions across our network, United Way must build a leadership pipeline of well-trained, experienced, high-quality, diverse and motivated professionals who are ready and able to step into key positions as needed—within their local communities and across the network.

The succession management strategy, along with tools and resources to support its implementation, will enable continuity of operations, preserve critical organizational knowledge and help ensure the stability of United Ways and the network. The strategy is also linked to all United Way talent management practices as we work to continuously identify, develop and nurture top-performing professionals.
CONCLUSION

United Way’s business strategy cannot stand on its own. It is only through the effective and strategic use of our talent—our people—that we can accomplish our business goals and achieve results.

The implemented talent management strategy will:

• Provide a common platform and direction for United Way to recruit, develop and retain employees across the network, and it will help us anticipate and satisfy our future talent and leadership needs.
• Ensure that United Way leadership and staff have the required skills and competencies to execute the United Way business model and strategic direction.
• Ensure that the United Way network reflects the diversity of the communities we serve by proactively recruiting, developing and retaining high-quality and high-performing diverse talent.
• Ensure that United Ways have developed succession plans for CEOs and are continuously identifying and retaining high-quality talent.

Through the network-wide talent management strategy, United Way will attract and retain the talent and leadership necessary to improve people's lives, advance the common good for all and build United Way's employment brand and reputation as the mission of choice for people who want to make a difference throughout their professional lives. Talent cannot be seen in isolation from the rest of the business; talent is the foundational resource upon which UnitedWay's business strategy is built. The right talent will drive performance and results against the toughest challenges.

A LOCAL PERSPECTIVE

As a local United Way, we know how important relationships are with people within our organization and at partner organizations, businesses and local governments to achieving our desired outcomes for the community. Why wouldn't the same be true for us as an organization and as a network? It is our people that bring our mission and vision to life. Our people—our staff, our volunteers, our partners and our donors in our own local communities and across the globe—are our greatest asset. The Talent Management Strategy places a priority on connecting our employees and volunteers to one another across the network to strengthen relationships, establish mentoring relationships, help high performers excel and share lessons and successes. We are more connected now than ever before. By working, learning and sharing together we will build a network of strong, smart and effective mission-minded professionals that will make United Way the philanthropic partner and employer of choice.

Barbara Couto Sipe, Vice President, Community Impact, United Way of Greater Richmond & Petersburg (Richmond, VA)
The success of the United Way network in the United States will be measured by our ability to achieve meaningful impact, create positive change in communities and build a strong network that fulfills our mission. We have identified six core performance areas that will define our shared success: (1) trust in United Way, (2) local and national impact, (3) network revenue with emphasis on resources under management, (4) number of engaged individuals, including donors, (5) United Way’s own culture, and (6) a Human Capital Index.

Key performance indicators will be identified and tracked regularly to ensure that we collectively make progress with the work and toward realizing our long-term goals. For example, we’ll track attendance and graduation rates in targeted communities; the number of companies accessing multiple products from United Way’s expanded corporate engagement platform; the growth of individual donors giving to our education, income and health agendas; the number of formal and informal collaborations occurring across the network; and the percentage of United Ways with succession plans.

The Big Moves serve as the key mechanisms that will drive success of the overall performance metrics. Although each Big Move will independently contribute important results, it is the collective power of these efforts that will produce the measurable and sustainable results required to create the systemic change we desire.
TAKING THE WORK TO ACTION

KEY IMPLEMENTATION REQUIREMENTS

The sense of urgency to act on these Big Moves has never been greater. As the Task Force sunsets its planning phase, the United Way network must begin implementation with a focus on early wins and activities that drive a new culture and structure that supports accelerated progress on our local and national impact. This section highlights the key actions that must occur over the remaining months of 2012 and an overview of the expectations and opportunities through 2014.

Critical Implementation Steps to Activate the Big Moves in 2012

To begin the transition from planning to implementation over the remaining months of 2012, there are a series of major activities that need to be accomplished:

1. Organize United Ways within a new framework and finalize the set of basic and differentiated supports and services for each segment.
2. Recruit and equip groups of United Ways to pioneer the Partnerships, with the goal of driving progress locally and nationally in three areas: high school graduation, corporate engagement including Fortune 500 companies and talent management.
4. Reorganize United Way Worldwide to facilitate these changes by fostering network collaboration and providing support to United Ways and their communities as they implement the Big Moves and bring the work to scale.
5. Educate and engage United Way volunteers, leaders and staff on the Task Force’s direction, strategies and activities, including how these efforts will positively impact children, families and our communities.
Launching into Action in 2013

As the network completes the key steps in 2012, United Way will expand efforts to accelerate progress against our education goal, build stronger and deeper relationships with Fortune 500 companies, and move through the talent strategy to attract, retain and develop the talent necessary for our network’s success.

In 2013, key actions will center in the following areas:

- Collect and disseminate findings and innovations from the three pioneer Partnerships in preparation for implementation across the network.
- Provide basic and differentiated supports and services to segments of United Ways to accelerate their growth and impact.
- Implement prioritized talent strategies to ensure we recruit, retain and develop the right talent to accelerate United Way’s work at the local, state and national levels, and accelerate the development of the next generation of leadership within the network.
- Organize United Way Worldwide as a backbone entity to support and empower a horizontal network of United Ways.
- Plan how to address the outstanding issues identified by the U.S. Task Force on United Way’s Economic Model & Growth (see next section).
- Engage volunteers and partners in our actions in intentional and strategic ways.

Continuing and Scaling Success in 2014

The actions in 2012 and 2013 will begin the process of transforming United Way’s operating model and reshaping our culture, relationships and strategies in dramatic ways. In 2014, United Way will assess, adjust, replicate and scale the initiatives for broader and deeper success. Updated strategic plans will need to be developed by the network’s leadership to ensure United Way moves forward with renewed speed and purpose in the years ahead.

The sense of urgency to act on these Big Moves has never been greater.
KEY AREAS TO ADDRESS MOVING FORWARD

As the Task Force concludes its two-year effort, it recognizes the need to highlight several cross-cutting areas that are central to United Way’s business model and our ability to work together as an interdependent network. It is critical that United Way address the following issues in order to accelerate the quality, effectiveness and success of the network:

1. United Way’s ability to **ATTRACT THE NECESSARY CAPITAL** to meet the requirements of the Task Force plan. It will entail an initial emphasis on investment among network members, but, over time, we also need to attract significant funds from third-party sources.

2. United Way’s ability to deeply **ENGAGE BOARD MEMBERS** and key volunteers across the network—at local, state and national levels—in continuing to define the future direction and participate in fulfilling the Task Force recommendations.

3. United Way’s ability to **BUILD OUT ITS PUBLIC POLICY AGENDA**, staff and relationships at the local, state and federal levels so that programmatic and policy gains produce systemic and sustainable change.

4. United Way’s ability to further **DEVELOP, INTEGRATE AND SCALE ITS INDIVIDUAL ENGAGEMENT** efforts to ensure that donors, advocates and volunteers have a personal connection to United Way in their local community, while also forming an enduring movement that drives change across the country.

5. United Way’s ability to further develop its **INFRASTRUCTURE** as an operating network, with an emphasis on technology solutions and business partnerships, which will drive efficiencies in our operations and effectiveness in our collaborations.

The Task Force believes these five areas require deeper examination and follow-up action plans, which will further fortify United Way’s business model and generate tremendous value for the United Way brand.
CALL TO ACTION: WORKING TOGETHER TO BUILD THE UNITED WAY FOR THE FUTURE

Several concrete actions can be taken right now by United Ways to accelerate the implementation of the Task Force’s recommendations. Here is what your United Way can do now:

1. Share this report with your Board and staff and discuss what this new way of working together means for your United Way and for our network.

2. Review the Partnership call for applications and assess your United Way’s readiness to partner with other United Ways around (1) national impact on high school graduation rates; (2) a new model for corporate relationships and engagement; and (3) United Way’s comprehensive talent strategy.

3. Discuss the Partnership opportunity with your Board and determine if you’ll apply during the initial launch or in the future as more groups are formed.

4. Adopt the network-wide talent management strategy and ensure talent management is one of your top organizational priorities. Begin by incorporating the new competencies in attracting, developing and retaining talent and by implementing succession planning to ensure organizational stability and maintain competitive advantage in the nonprofit sector.

5. Provide developmental opportunities, mentoring and coaching to high-performing and high-potential talent within your organization and network-wide.

6. Review Charting a Course for Change: Advancing Education, Income and Health through Collective Impact to assess your community’s need, ability and readiness to implement the strategies within the document.

7. Participate in calls to meet other United Ways placed in a similar position on the Business Performance Matrix and help design a suite of supports and services for your segment that will meet your United Way’s needs.

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CALL TO ACTION – CONTINUED

This is a critical period for our network and our nation. The pressures and challenges facing communities, families, individuals, schools, governments and many other stakeholders are real and deep.

Together with our broad range of partners across sectors, United Way can—and must—make significant contributions to addressing the critical issues of our time. We cannot accept the status quo. We must be catalysts for change and champions of progress, both within our network and across the nation.

We must model the leadership that is required in today’s complex environment and leverage the resources and relationships that will foster dialogue, generate action and deliver results at scale.

As we leverage the local and national capacity of the network, each United Way will have an important role to play in defining the future.

Through the commitment and actions of individuals, organizations and groups, coupled with the collective power of the United Way network, we can envision a world where all children receive a quality education, the cycle of poverty and financial dependency ends, and everyone can live healthy and fulfilled lives.
Working Together to Drive Results Across Our Communities
THANKS AND ACKNOWLEDGEMENTS

This report captures the work of the U.S. Task Force 2.0 on United Way’s Economic Model & Growth and the multiple Initiative teams.

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The Task Force also recognizes the National Professional Council for their leadership, partnership and support throughout this effort.