



# BOY SCOUTS OF AMERICA®



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# UNDERSTANDING UNITED WAY TRENDS

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# INTRODUCTION

In 2010, United Ways across America provided \$53,160,856 to 291 of our 296 BSA councils. This figure represents 7.22 percent of all local council income, a significant amount of support, and a 7.4 percent decrease over 2009.

Obviously, it is important that good working relationships with local United Ways be maintained and enhanced.

Several important topics that continue to affect the United Way and the Boy Scouts of America include program funding, donor option, community foundation funding, donor choice, outcome measures funding, social and philanthropic trends, and allocations presentation.

## **Objective**

The purpose of this manual is to assist you in understanding the trends of United Way of America and the importance of maintaining a good relationship.

# UNITED WAY TRENDS

In 2000, United Way of America announced that it would shift its strategic focus from a fundraiser to community-impact organization. For the next several years, United Way of America began promoting the Agenda for Community Impact model, and local affiliates began adopting the model. United Way of America promoted issues that included education, income stability, and healthy lives. At the heart of the Community Impact approach was that United Way organizations could select and focus on local issues, raise funds for those issues, and make grants to organizations that demonstrated the capacity to affect issues.

The greatest implication of this decision was to move the United Way from being a collection of funded agencies to an organization that funds issues that a community deems a high priority. The other significant implication is that funding causes, rather than member agencies, reallocated dollars and reduced funding available to United Way's traditional agency base. In many cases, this resulted in drastic cuts for many agencies, no funding for others, and in several communities, an abandonment of the member-agency model altogether.

National agencies with local affiliates seem to have been affected by the Community Impact model. The American Red Cross has been defunded or has seen substantially lower allocation by United Way organizations serving New York; Portland, Oregon; Dallas; and Palo Alto and Orange County, California, to name a few. Salvation Army funding was cut so severely in Philadelphia, Cincinnati, and Boston that the organization withdrew from those United Way affiliates. Examples of other groups feeling the impact of the new United Way approach and allocation of funds include the Boy Scouts of America, Girls Inc., the Girl Scout USA, YMCA, and Goodwill Industries.

But not all United Way organizations have adopted the Agenda for Community Impact model. Many still retain member agencies (now referred to as partners) alongside the priority causes or issues representing each community's needs. While this responds to local needs, it means that organizations like the American Red Cross, the Boy Scouts or regional agencies that cross multiple local United Way organizations may be funded by one United Way jurisdiction and not by an adjacent United Way.

It is important to understand that United Way organizations collectively raised \$3.91 billion in 2001 and \$3.85 billion in 2009. In light of these figures and the decreasing revenue from workplace campaigns, the strategy to reduce a portion of United Way funding from the workplace is indeed happening. While United Way's strategy of diversifying its funding sources has not achieved an increase in revenue, it may be a necessary strategy given what appears to be the deteriorating appeal of the United Way in the workplace. So unless charities can find other sources of revenue, \$600 million per year probably will be lost through the decline of the United Way in the workplace.

During a nine-year period, giving to the United Way has lost market share as a portion of total U.S. giving and has suffered from continued erosion of dollars donated through the workplace.

In 2008, United Way initiated a 10-year program designed to achieve the following goals by 2018:

- [Improve education](#), and cut the number of high school dropouts—1.2 million students every year— in half.
- Help people achieve [financial stability](#), and get 1.9 million working families—half the number of lower-income families who are financially unstable—on the road to economic independence.
- [Promote healthy lives](#), and increase by one-third the number of youth and adults who are healthy and avoid risky behaviors.

An example of how a council might fit into this model:

	 <b>FINANCIAL STABILITY</b>	 <b>HEALTH &amp; WELLNESS</b>	 <b>COMMUNITY ENHANCEMENT &amp; STABILIZING PERSONAL CRISIS</b>	 <b>EDUCATION</b>
Vision	Increase the capacity of families & individuals to achieve financial stability.	Improve the health & wellness of Wayne County families.	Stabilize personal crisis by meeting emergency assistance needs with dignity.	Improve futures for children through successful educational experiences.
Goals & Programs	<b>Increase Adult Literacy</b> Literacy Connections- WCP	<b>Reduce Obesity</b> Intervention for Life Obesity Program- WATCH Boy Scouting- BS Girl Scouting- GS  <b>Prevent Teen Pregnancy</b> Health & Life Skills- B&G Girl Scouting- GS  <b>Encourage Healthy Lifestyles</b> Boy Scouting- BS Girl Scouting- GS Incredible Years Parenting Program- PFC First Steps Parenting Program- WAGES Growing Pains Prenatal Program- PFC	<b>Meet Basic Needs</b> Armed Forces Emergency Services- ARC Disaster Services- ARC Emergency Assistance- SSVDP Nutrition Program for the Elderly- WAGES Social Services- SA <b>Provide Safe Shelter</b> Domestic Violence Prevention- WU Disaster Services- ARC Emergency Assistance- SSVDP Homeless Men's Shelter- SA Social Services- SA <b>Offer Crisis Counseling</b> Domestic Violence Prevention- WU Emergency Assistance- SSVDP Homeless Men's Shelter- SA Social Services- SA <b>Community Enhancement</b> Blood Services- ARC	<b>Support School Readiness</b> Born Learning- PFC Girl Scouting- GS  <b>Encourage Academic Success</b> Girl Scouting- GS Boy Scouting- BS Education & Career Development- B&G Teen Court- CIS  <b>Develop Mature Adults</b> Girl Scouting- GS Boy Scouting- BS Education & Career Development- B&G Teen Court- CIS
2011 Community Partners	Wayne County Charitable Partnership WCP	WATCH Boys & Girls Club- B&G Boy Scout Tuscarora Council- BS Girl Scout Council- GS Partnership for Children- PFC WAGES	American Red Cross- ARC Salvation Army- SA Wayne Uplift Resource Assoc.- WU WAGES Society of St. Vincent DePaul- SSVDP	Boy Scout Tuscarora Council- BS Girl Scout Council- GS Boys & Girls Club- B&G Community In Schools- CIS Partnership for Children- PFC

You can learn more about United Way's 10-year goals in education, income, and health from our report "[Goals for the Common Good, the United Way Challenge to America](#)," at [www.liveunited.org](http://www.liveunited.org).

Some United Ways are showing interest in directly funding specific programs—“program funding” that reflects priority community needs, *not* funding of agencies. Agencies that have received United Way funding for comprehensive operating budgets in the past may be asked to submit their allocation requests by specific programs in the future. Other United Ways are interested in a community foundation funding model where a letter of intent and request for funding for services provided toward a designated impact area will be considered.

United Way allocation committees are interested in funding organizations that collaborate with other organizations in providing services that address community needs. BSA councils collaborate daily with chartered organizations in the community representing business and industry, professional and community groups, education, labor, and religion. These organizations help serve children, youth, and families with the programs of the Boy Scouts of America.

United Ways are showing a growing interest in funding organizations that support a diversity of people. For example, people with special needs, people in low-income inner-city/urban areas, juvenile offenders, people who are disadvantaged, the unemployed, etc.

Donor choice giving through United Ways continues to increase, particularly in large metropolitan areas.

The accountability of charitable dollars received and distributed by United Ways has become increasingly important to donors. Traditional agencies like BSA councils that have received operating funds from United Ways in the past are now being asked to account for United Way funding through the allocations request process.

Note: These national priorities are not local community United Way priorities. Each United Way board decides on the important needs of their communities in the areas they serve.

## **Things to Consider to Strengthen Your Agency Relationships**

Strong, positive relationships are important to the future of United Way funding to BSA councils. It is important to keep the lines of communication open at all times. In requesting United Way funding, Scouting programs in local councils need to specifically address how they help people solve identified community needs through collaboration with other organizations.

### **1. Agencies will be funded based on their role as strategic partners in community impact.**

- *The BSA will continue to develop, manage, and evaluate positive outcomes that relate to each community's priority needs.*

**2. United Ways and agencies need to have shared missions.**

- *Many BSA national and council programs related to service projects, strengthening families, helping the elderly, and food collection and distribution, match United Way's priorities in many communities.*

**3. Outcomes also relate to specific populations within the community.**

- *All-Markets Strategy programs in local councils and Learning for Life do a great job serving youth diversity, K-12, and those less fortunate in communities throughout the U.S.*

**4. To receive more direct funding, a few United Ways are trying to identify a plan to help their campaigns focus less on donor designations.**

- *Current United Ways that offer donor designations to local councils most likely will continue. The risk of losing donors completely to direct funding for agencies and/or via electronic online giving is a concern to United Ways.*

Here are a few suggestions from local United Way directors and the United Way of America for building and strengthening positive relationships between BSA councils and United Ways.

1. Demonstrate positive results in meeting needs identified and prioritized by United Way, including documentation of outcomes and objectives.
2. Actively participate and collaborate with local United Ways in marketing efforts to enhance campaign success.
3. Actively and aggressively participate in needs assessments, coalition-building, and community problem-solving efforts of United Way, particularly involving youth, delinquency prevention/intervention, juvenile justice, and substance abuse.
4. Work closely with local United Ways when concepts, planning, and partnerships are being developed, *not* just when requesting additional funding.
5. Share BSA programs and literature that are helping to build better neighborhoods and communities by demonstrating how Scouting strengthens families, creates safe environments, meets basic needs, helps to foster personal well-being and interdependence, nurtures children and youth for success, and prepares young adults for the workforce.

Local BSA councils and United Ways should work together toward building better communities through communication, support, and strong, positive relationships.

# UNITED WAY FUNDING

## What Is Program Funding?

**Program funding** is one method United Ways use to fund agencies that are meeting community needs identified by citizen involvement. It is funding that is restricted to a specific program; a response to an agency request to fund all or part of a given program or implementation of a United Way request to an agency to take responsibility for a specific program.

Scouting program funding objectives can be met by matching our services with identified community needs, without abandoning our mission statement and principles.

Through careful study and evaluation of BSA programs, we can better understand program funding. We must identify staff time, staff resources, council resources, and services that are being used to help fight unemployment, poverty, crime, environmental issues, education concerns, drug abuse, child abuse, and other community needs.

United Ways focus on program funding to have a clearer understanding of how United Way funds are being used by agencies and how they make a difference in the community.

## How Can a Council Work With Program Funding?

Listen—ask the United Way questions, and *listen* to their answers.

Understand the priorities of your local United Way. For example, if comprehensive youth development is a low priority, then identify issues with high priorities that Scouting addresses. Show a willingness to collaborate with other organizations and service providers.

Review all aspects of the council program, analyze time studies, examine the resources available to meet community needs, and determine their cost.

Educate United Way and Scouting volunteers to suggest that Scouting is more than just a “traditional” organization.

Local councils can educate United Way leadership. Even though Scouting is a “program,” there are many components of our program that deserve funding because they address United Way priorities and needs in the community.

## What Is Community Foundation Funding?

The United Way has made it our goal to have a pulse on community human care needs.

In the past they have been thought of as a fundraiser, merely funneling the dollars we raise to social service agencies, and that was it. But through research conducted by the national United Way of America organization, a change in the approach to community building is necessary to improve conditions in the communities we serve. The United Way is determined to best fulfill its mission of "improving lives by mobilizing the caring power of communities" by shifting its role from fundraiser to leading community impact organization.

Their goal is to be the "Charity of Choice" for all community members. They will do the homework of where the community needs are greatest, we will implement standards tracking to ensure that the programs funded are effective and efficient, and we will rally social service agencies and the corporate community to continue "Working together to Advance the Common Good."

United Way has adopted an approach that reflects the United Way's focus upon community impact and results, outcomes, measurement, and achievement. *Only programs providing primary and/or secondary prevention will be considered.* Programs are required to identify the United Way Impact Area being addressed and select a prescribed program outcome

1. Letters of Intent—submit a Letter of Intent for consideration of future funding.
2. Requests for Program Funding—If the Letter of Intent is recommended by the review panel, you will be invited to submit a full proposal. Only those organizations that have been invited are eligible to submit a Request for Program Funding.

United Way will provide funding only to support operating costs for programs with measurable outcomes that fall into one of their identified impact areas.

## What Is Competitive Grant Process Funding?

### United Way Competitive Grant Process Overview:

- Grants are awarded based on the proposal's merit after conducting a competitive grants process.
- Funding is zero-based (in other words, past grant amounts are not taken into consideration).
- Program grants are determined by a volunteer team review process. Grants are awarded by the rating/ranking of the program and availability of funds, typically utilizing an established scoring system or criteria.

- The process is open. All eligible community programs are invited to submit a proposal.
- To be eligible to receive funding, agency programs must be working toward at least one of the Community Impact Outcomes. These typically are aligned with three areas: education, financial stability, and basic needs.
- The agency must meet all fiscal and programmatic eligibility criteria.

#### **Key Elements:**

- Request for Proposals (RFP) for Community Impact Grant funding
- Mandatory Information Session held for all interested program representatives. Programs not represented at the meeting are not eligible to apply for a grant.
- Typically will not fund more than one agency per community impact outcome, and not fund more than two outcomes per agency.
- Community impact outcomes are typically based on a random survey of households in the United Way area.

### **Allocations Relationships with United Ways**

Today, the Boy Scouts of America continues to make a positive impact on communities through programs addressing some of the critical issues facing youth, the middle-age, and the elderly, such as health, crime and violence, substance abuse, crisis intervention/emergency services, education/literacy, mental health, abuse/neglect, economic issues, child care, and housing. Scouting is suited to meet these challenges.

Boy Scout councils can make a positive statement, preparing a viable case for support. The Finance Impact Department has several United Way support resources available to assist in these efforts. These resources, plus the booklet *Scouting's Positive Impact on the Community*, are all available. This is an extremely valuable resource guide in developing an allocation presentation.

However, the responsibility for marketing your council's success in, and potential for, providing solutions to both immediate and long-range community priority needs must be addressed at the *local* level.

This checklist offers suggestions for maintaining or improving your council's United Way funding. Each United Way is independent, with unique priorities and strategies for meeting community needs; thus, council leaders must interpret Scouting's resources, tools, and delivery methods in meeting *local* United Way priorities.

# APPENDIX

## Local Council Allocations Checklist

(Not in order of priority)

(Mark with an "X" if completed.)

1. \_\_\_\_\_ Are top community leaders involved in your council operation?
2. \_\_\_\_\_ Have you researched and studied the historical relationship between the council and United Way? Do your council and board actively support the United Way campaign?
3. \_\_\_\_\_ Has your council analyzed United Way priorities and innovatively matched *your* local council programming to *their* identified needs?
4. \_\_\_\_\_ Does your council use United Way terminology in describing council support of the United Way?
5. \_\_\_\_\_ Are your council achievements (e.g., Eagle, pack, and troop service projects; Good Turns; etc.) statistically measuring Scouting's positive impact on the community, and then sharing with the United Way?
6. \_\_\_\_\_ Does your council's long-range plan incorporate United Way priorities?
7. \_\_\_\_\_ Did your council creatively involve United Way's key leaders and other respected community leaders in the development of your plan?
8. \_\_\_\_\_ Is the council proactive in any "priority needs assessment," "priority setting," or "community problem-solving" programs initiated by the United Way?
9. \_\_\_\_\_ Do you understand the volunteer and professional relationships between the United Way and the Boy Scouts of America?
10. \_\_\_\_\_ Have you analyzed past allocation presentations and documents, interpreted budget funding results, and asked United Way to critique your organization in previous years?
11. \_\_\_\_\_ Have you chosen the best method (in person, board member, Scouting youth, video, slides, written script, document, etc.) for your presentation?
12. \_\_\_\_\_ Have you chosen the most credible, respected, and well-known individuals from the community to represent your council?
13. \_\_\_\_\_ Do you have a year-round relationship and cultivation program with United Way volunteers and professionals?

14. \_\_\_\_\_ Does the United Way receive your council newsletter and specific invitations to local council and district activities?
15. \_\_\_\_\_ Does the United Way distribute donor designations to your local council? Are they above and beyond your normal allocation?
16. \_\_\_\_\_ Do you utilize United Way personnel and resources in council and district activities (e.g., Scouting for Food, Eagle courts of honor, council and district annual dinners, etc.)?
17. \_\_\_\_\_ Are you using the Boy Scouts of America literature and terminology in United Way communications (merit badge system, Good Turns, Louis Harris and Interactive Results, "Values of Men and Boys in America," local council survey kit, *Scouting's Positive Impact on the Community* guidebook, BSA fact sheets, Scoutreach literature, volunteer and camping outcomes, *Boys' Life* magazine, *Scouting* magazine, etc.)?
18. \_\_\_\_\_ Do you treat the United Way with the same courtesy and respect given to *large major contributors* to your Friends of Scouting campaign?
19. \_\_\_\_\_ Does the United Way know the names and types of the culturally diversified chartered organizations that your council collaborates with on a daily basis to help solve community needs?
20. \_\_\_\_\_ Does your council recognize and thank the United Way annually for their support, in public?
21. \_\_\_\_\_ Do the council and district newsletters reflect United Way campaign promotion and support, with copies sent to the United Way?
22. \_\_\_\_\_ Has your council developed a pamphlet on the values and purposes of Scouting for distribution to allocation committee members (particularly women without a Scouting background or knowledge of the programs)?
23. \_\_\_\_\_ Do your council and local United Ways have copies of each other's policies and procedures manuals?
24. \_\_\_\_\_ Does your council submit requests for funding proposals for special projects, in addition to allocation requests, for United Way funding?
25. \_\_\_\_\_ Does the council have United Way applications and allocation forms on computer?



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