







# THRIVING UNITED WAY SELF-ASSESSMENT PRINTABLE VERSION



# THRIVING UNITED WAY FRAMEWORK OVERVIEW

The Thriving United Way Framework was co-created in 2023 with meaningful input from more than 50 percent of the global United Way Network. In addition to building on a strong foundation of successful local United Way practices, the Thriving United Way Framework has been informed by past United Way Network performance frameworks, as well as best practices in the nonprofit and social sectors.

 <b>COMMUNITY LEADERSHIP</b>	 <b>EQUITABLE COMMUNITY IMPACT</b>	 <b>BRAND STRENGTH, AWARENESS &amp; RELEVANCE</b>	 <b>DIVERSIFIED REVENUE STREAMS</b>	 <b>STRONG ORGANIZATIONAL FOUNDATION</b>	 <b>NETWORK CITIZENSHIP</b>
Listen to and engage with the community in creating solutions and shared ownership	Establish measurable impact strategies that reflect community needs and drive equitable outcomes	Leverage United Way brand assets to build a strong reputation across local audiences and channels	Engage staff and volunteers in fundraising strategies	Establish and maintain strong financial standards and data-informed operational efficiency	Follow United Way Worldwide membership accountability practices and procedures
Drive and participate in multi-sector community collaboration to solve local challenges	Utilize community and corporate volunteers to enhance and expand scope of impact work	Communicate impact results to demonstrate United Way's role and value, and drive local engagement	Implement year-round donor engagement and sustainable fundraising best practices for individual and corporate donors	Ensure an effective and sustainable governance model	Actively contribute to Network, local/regional collaborations and offerings
Build local reputation through partnerships that leverage United Way expertise	Advocate for public policy that advances impact priorities	Engage the community through consistent and proactive marketing and communications	Activate diverse, sustainable revenue streams	Board and staff to drive United Way performance using relevant resources and technology	Strive to partner and collaborate with other United Ways across the Network
Lead with a growth mindset, inspire innovation, and monitor emerging trends	Ensure representation in all work related to Inclusion, Diversity, Equity, and Access (IDEA)	Understand the public sector, philanthropic, and social landscapes to leverage trends and opportunities	Leverage community impact success to amplify diverse fundraising efforts	Build an equitable, agile and forward-thinking culture	Engage with global United Way Network to create a culture of trust

Your Name:

United Way Name:

In the assessment that follows, you are not required to check any boxes if they are not relevant to your United Way. However, feel free to check multiple if applicable.

## COMMUNITY LEADERSHIP

**Success Statement:** United Way is known as a respected leader and partner in addressing communities' most significant challenges.



### Success Factor 1: Listen to and Engage the Community in Creating Solutions and Shared Ownership

Our United Way does not do this at this time.

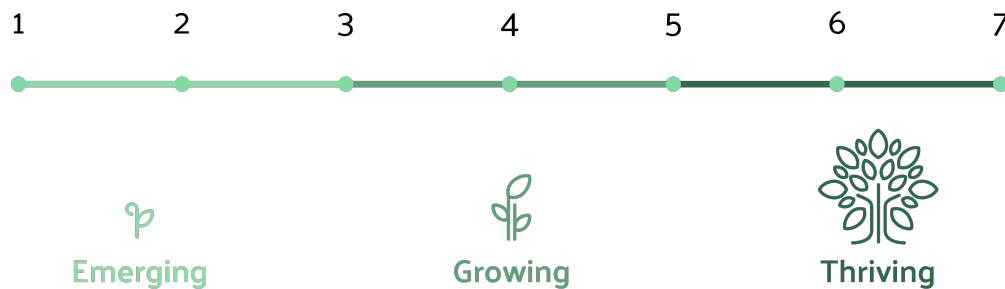
Our United Way should prioritize improvement in this area over the next 12 months.

I don't have enough information to assess this Success Factor.

**Use the key practices provided below to assess your United Way's performance on Success Factor 1:**

Emerging	Growing	Thriving
United Way participates in community conversations, contributing to a safe space for diverse voices and perspectives.	United Way leads and/or co-hosts community conversations with diverse stakeholders to co-create solutions that effectively address community needs.	United Way intentionally and regularly engages diverse and underrepresented communities in solving community problems.

Select your rating below:



Examples from my United Way:

**Additional details on the success factor:**

**Success Factor Metric:** Percentage of community solutions where United Way fosters effective listening, engagement, and co-creation.

**Why this Success Factor is important:** Collaboration and shared ownership lead to more effective, sustainable, and socially just solutions by respecting and valuing the voices and perspectives of those directly affected by the issues being addressed.

**Additional details on the success factor:**

Emerging	Growing	Thriving
<p>United Way prioritizes sending staff and volunteer representatives to community meetings and convenings.</p> <p>Participate in community meeting and networks, consider possible barriers to services and work to remove them.</p>	<p>Includes stakeholders and representative members of the community and individuals with lived experience and removes barriers to their participation (e.g., accessible location, considering public transportation routes, providing childcare and/or food, etc.).</p> <p>Conducts cross-sector (e.g., business, organizations, residents, partner nonprofits, etc.) listening sessions and deploys surveys resulting in correlated action steps.</p>	<p>Has a documented strategy for fostering effective listening, engagement, and co-creation sessions.</p> <p>Continual updates to strategies, goals and plans because of tracking change, community engagement and feedback loops.</p>

## COMMUNITY LEADERSHIP

**Success Statement:** United Way is known as a respected leader and partner in addressing communities' most significant challenges.



### Success Factor 2: Drive and Participate in Multi-sector Collaboration to Solve Local Problems

Our United Way does not do this at this time.

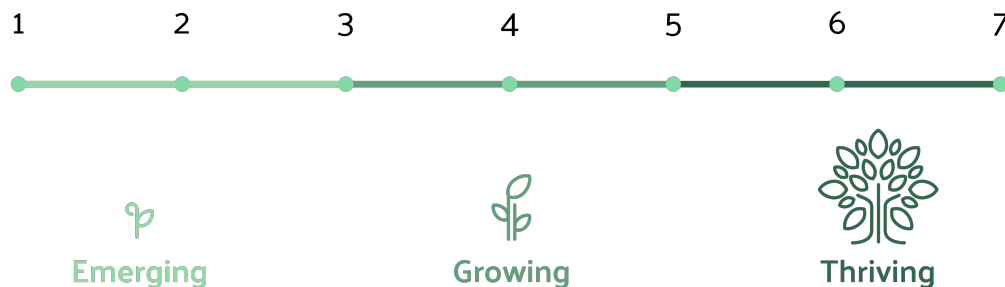
Our United Way should prioritize improvement in this area over the next 12 months.

I don't have enough information to assess this Success Factor.

**Use the key practices provided below to assess your United Way's performance on Success Factor 2:**

Emerging	Growing	Thriving
United Way seeks opportunities to engage with community groups and collaborations.	United Way leads and/or engages in productive multi-sector community collaborations.	United Way regularly leads multi-sector collaborations that are an essential part of its impact work and is seen in the community as critical to driving these partnerships.

Select your rating below:



Examples from my United Way:

**Additional details on the success factor:**

**Success Factor Metric:** Active cultivation of and/or participation in successful multi-sector collaborations where United Way is a leader and “uniter of resources” in addressing consequential community challenges.

**Why this Success Factor is important:** Effective approaches to addressing complex problems in our communities require multi-sector collaboration and United Way plays key roles in these partnerships, whether as a participant, a leader or a convener.

**Additional details on the success factor:**

Emerging	Growing	Thriving
<p>Staff responsibilities include representing United Way in community groups.</p> <p>Mapping and prioritizing community groups that align with United Way focus areas.</p>	<p>Serves as backbone for community-owned collective impact and place-based initiatives, engaging multiple partners for programming and leadership development.</p> <p>Sponsor and participate in major community initiatives to identify and advance collaborative opportunities.</p>	<p>United Way leadership serves on the Boards of the leading organizations in the community across sectors to maintain a pulse of the community overall.</p> <p>United Way invests in 211 to ensure delivery of just-in-time services and uses 211 data to inform collaborative efforts to address local problems.</p>

## COMMUNITY LEADERSHIP

**Success Statement:** United Way is known as a respected leader and partner in addressing communities' most significant challenges.



### Success Factor 3: Build Local Reputation through Partnerships that Leverage United Way Expertise

Our United Way does not do this at this time.

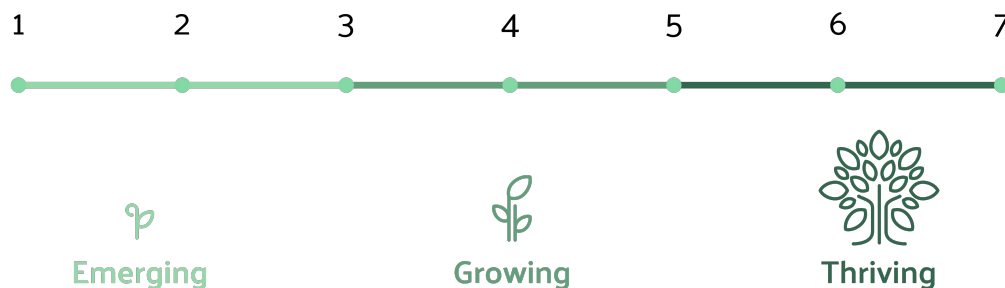
Our United Way should prioritize improvement in this area over the next 12 months.

I don't have enough information to assess this Success Factor.

**Use the key practices provided below to assess your United Way's performance on Success Factor 3:**

Emerging	Growing	Thriving
United Way is beginning to support community partnerships that set goals, use local data and expertise, engage the community, bring in important stakeholders, and communicates about significant partnership progress and results.	United Way establishes a reputation as an expert and supporter of effective partnerships in at least one area of community need.	United Way is recognized as a thought leader and trusted partner in multiple areas of community need and in creating long-term collaborations with community partners.

Select your rating below:



**Examples from my United Way:**

**Additional details on the success factor:**

**Success Factor Metric:** Active cultivation of and/or participation in partnerships where United Way is recruited for its expertise and contributions that then lead to greater investments in issue areas.

**Why this Success Factor is important:** Building a local reputation through partnerships that leverage United Way's expertise is a strategic approach that combines the strengths of a trusted organization with the local knowledge and context of community partners. It not only enhances the impact of local initiatives but also contributes to a stronger and more resilient community.

**Definitions and examples from other United Ways:**

Emerging	Growing	Thriving
<p>Convening funded community partners for annual needs assessments.</p> <p>Investment of both funding and expertise and leadership.</p>	<p>United Way is known for its connections to the nonprofit sector, knowledge, and skill in developing, implementing, assessing and improving grantmaking processes and investment impact.</p> <p>Collaborating with civic sector entities to offer civic engagement training, funding, and opportunities.</p>	<p>United Way is the leading organization that our community reaches out to and is known for its information, resources, cross-sector relationships and expertise in human services.</p> <p>Elected community leaders recognize United Way as the agency to rely on to respond quickly and address key issues within the community.</p> <p>Sharing 211 &amp; ALICE data with partners to inform collective action on prioritized community needs.</p>



## COMMUNITY LEADERSHIP

**Success Statement:** United Way is known as a respected leader and partner in addressing communities' most significant challenges.



### Success Factor 4: Lead With a Growth Mindset, Inspire Innovation and Monitor Emerging Trends

Our United Way does not do this at this time.

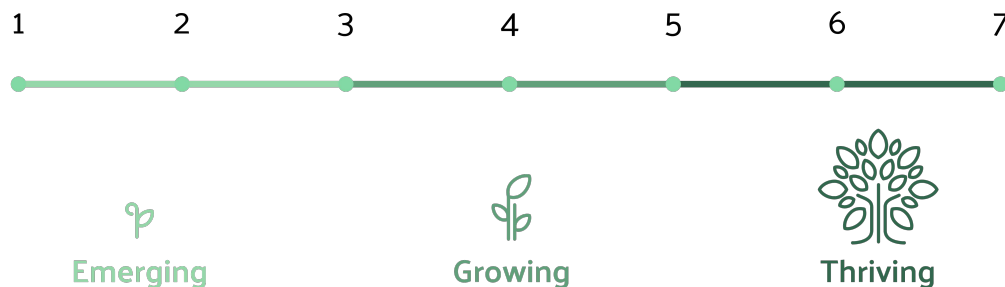
Our United Way should prioritize improvement in this area over the next 12 months.

I don't have enough information to assess this Success Factor.

**Use the key practices provided below to assess your United Way's performance on Success Factor 4:**

Emerging	Growing	Thriving
United Way has started to take risks, tries new approaches in its Impact efforts, and uses data to learn and improve, focusing on long-term success.	United Way leverages new approaches in its Impact efforts to strengthen community partnerships and improve effectiveness of Impact efforts.	United Way regularly uses data and analysis to identify trends, track progress, spark innovative community solutions, and better define shared community goals.

**Select your rating below:**



**Examples from my United Way:**

**Additional details on the success factor:**

**Success Factor Metric:** Number of new or innovative data-informed initiatives launched and/or invested in that foster recognized, positive community change.

**Why this Success Factor is important:** United Ways have the vision and perspective to continually identify opportunities to strengthen their communities. Evaluation of macro and community-level data and trends can inform priorities and gaps, assist with organizational strategies for change to remain relevant, and support adoption of new ideas.

**Definitions and examples from other United Ways:**

Emerging	Growing	Thriving
<p>Use data to inform program design by assessing depth and scope of problems and upstream issues to guide organizational priorities.</p> <p>Use of 211 data to understand community needs; consistently collect and monitor data reports from city, county, and state.</p>	<p>Application of mental models and methods to see opportunities and generate innovations.</p> <p>Conduct regular data-driven evaluations of performance to track record of accomplishments and ensure relevance.</p> <p>Launching innovation funds and programs to seed new solutions to community issues.</p>	<p>Strategic plan using various methods and data sources to track and understand trends and innovate.</p> <p>Regular evaluation of data collection and analysis to identify opportunities for more meaningful insights.</p> <p>Publication of dashboards on priority community initiatives to make data and insights useable across the community.</p>

## EQUITABLE COMMUNITY IMPACT

**Success Statement:** United Way provides equitable and sustainable solutions that address gaps and disparities to ensure that every person has access to the resources needed to thrive.



### Success Factor 1: Establish Measurable Impact Strategies that Reflect Community Needs and Drive Equitable Outcomes

Our United Way does not do this at this time.

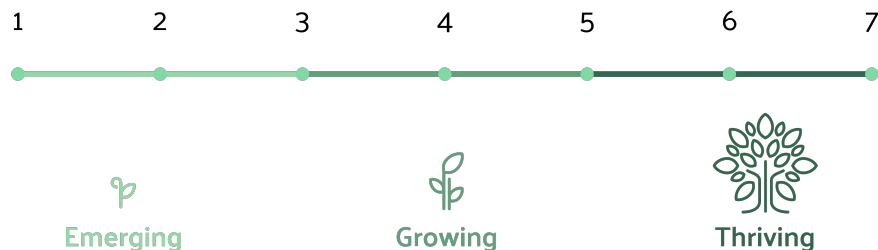
Our United Way should prioritize improvement in this area over the next 12 months.

I don't have enough information to assess this Success Factor.

**Use the key practices provided below to assess your United Way's performance on Success Factor 1:**

Emerging	Growing	Thriving
United Way uses local aggregated data to understand the landscape, engages diverse groups to understand their needs, and funds social service programs or agencies based on traditional criteria.	United Way has universal community goals, begins to use disaggregated data to prioritize issues, engages diverse groups to inform their Impact strategy, and funds programs, agencies, and/or community initiatives based on United Way universal community goals.	United Way regularly uses disaggregated data to prioritize issues, refine/develop strategy, set goals, track progress, engages diverse groups to inform the Impact strategy, and invests in strategies beyond direct services.

**Select your rating below:**



**Examples from my United Way:**

**Additional details on the success factor:**

**Success Factor Metric:** Documented impact agenda that includes goals, strategies, results measures.

**Why this Success Factor is important:** Every person in our community having access to resources needed to thrive aligns to United Way's ability to ensure that measurable strategies are developed, that are commiserate with and will address gaps/disparities.

**Definitions and examples from other United Ways:**

Emerging	Growing	Thriving
<p>Conducts regular community needs assessments, resource mapping and data-informed action planning.</p> <p>Utilize data from 211 system, other agency needs assessments, data collected from partner agencies, and external studies.</p>	<p>Documented impact strategy that includes data informed impact goals, strategies, investment approach, programs and anticipated results.</p> <p>Reporting of results based on disaggregated data to inform program and investment changes.</p> <p>Updated Investment and Data teams to ensure deeper community engagement and partnerships and collaboration.</p>	<p>Tracks impact goals, progress and outcomes using disaggregated data in a continuous feedback loop.</p> <p>Use of disaggregated data highlighting community composition, community needs and resources to inform impact work and community investments.</p> <p>Establishment of long-term bold goals based on community input and deep understanding of community data.</p>

## EQUITABLE COMMUNITY IMPACT

**Success Statement:** United Way provides equitable and sustainable solutions that address gaps and disparities to ensure that every person has access to the resources needed to thrive.



### Success Factor 2: Utilize Community and Corporate Volunteers to Enhance and Expand Impact Work

Our United Way does not do this at this time.

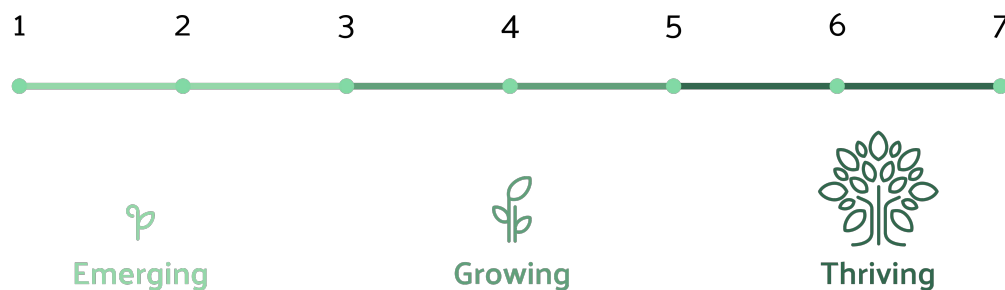
Our United Way should prioritize improvement in this area over the next 12 months.

I don't have enough information to assess this Success Factor.

Use the key practices provided below to assess your United Way's performance on Success Factor 2:

Emerging	Growing	Thriving
United Way has established volunteer management practices that ensure effective and efficient engagement of volunteers to further United Way's organizational and community impact goals.	United Way provides diverse volunteer opportunities that align with Impact priorities in the four Impact areas.	United Way provides year-round, diverse volunteer opportunities that result in deepening volunteers' understanding of the four Impact areas and United Way's measurable impact in the local community.

Select your rating below:



Examples from my United Way:

**Additional details on the success factor:**

**Success Factor Metric:** Number of engagements, volunteers and hours invested in each impact priority area.

**Why this Success Factor is important:** Volunteer community engagement and commitment enhance and expand the scope of United Way's impact work through a strategic approach that amplifies an organizational capacity, resources, and impact. It fosters community engagement, innovation, and partnerships while promoting cost-efficiency and sustainability in the pursuit of meaningful and transformative change.

**Definitions and examples from other United Ways:**

Emerging	Growing	Thriving
Annual calendar of volunteer engagement activities tied to community impact priorities. Days of Caring events for our corporate partners and nonprofit organizations  Days of Caring events for corporate partners and nonprofit organizations.	Strong board engagement across impact and sustainability efforts, helping to articulate equity as part of organizational priorities and strategic plans.  Volunteer engagement plan that leverages multiple types of engagement (grant review panels, days of service, program planning teams).  Recognize current volunteers' efforts and mobilize them as United Way champions.	Strategic volunteer engagement approach with formalized staff role/responsibilities.  Assessing volunteers' skills and interests to develop a volunteer engagement strategy that aligns with volunteers' goals and interests.  Prioritized recruitment of volunteers from host communities, as they are intimately connected to the project and are best positioned to contribute to its sustainability.

## EQUITABLE COMMUNITY IMPACT

**Success Statement:** United Way provides equitable and sustainable solutions that address gaps and disparities to ensure that every person has access to the resources needed to thrive.



### Success Factor 3: Advocate for Public Policy that Advances Impact Priorities

Our United Way does not do this at this time.

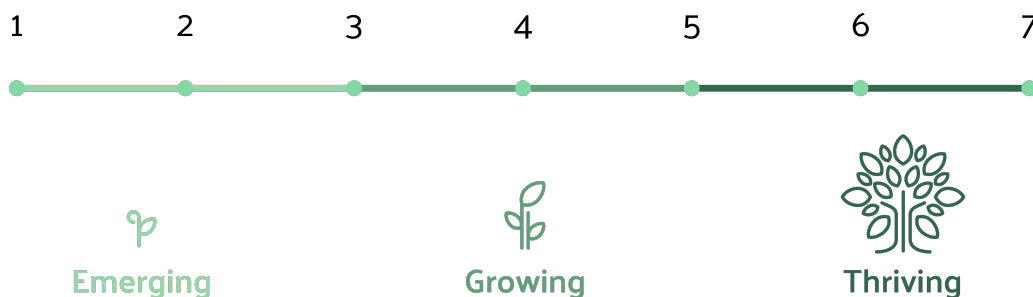
Our United Way should prioritize improvement in this area over the next 12 months.

I don't have enough information to assess this Success Factor.

Use the key practices provided below to assess your United Way's performance on Success Factor 3:

Emerging	Growing	Thriving
United Way strengthens relationships with community leaders and elected officials by better understanding their values, challenges, opportunities and needs.	United Way collaborates with community leaders and elected officials to develop shared agendas that advance impact goals and engage constituents on issues.	United Way is a respected advisor to policymakers and its Public Policy efforts are aligned with those of policymakers and community stakeholders, resulting in changes in laws and regulations that support United Way Impact goals.

Select your rating below:



Examples from my United Way:

**Additional details on the success factor:**

**Success Factor Metric:** Advocacy, support, and promotion of specific local/state/federal policy changes that advance resources for, or implementation of, Impact goals.

**Why this Success Factor is important:** Government investment in systemic impact solutions represents sustainable support necessary to measurably advance approaches to address community needs.

**Definitions and examples from other United Ways:**

Emerging	Growing	Thriving
<p>Regular engagement of United Way volunteers, funders staff, elected officials and public sector staff at all levels of government to better understand shared goals.</p> <p>Participation in local/state/federal advocacy days.</p> <p>Leverages understanding of local/state politics to inform planning for policy and advocacy efforts.</p>	<p>Creation of data-informed and board approved public policy priorities/ agenda aligned to community impact agenda.</p> <p>Formal organizational structure/staff and/or supporting policies to advance policy priorities.</p> <p>Strong and regularly cultivated relationships community leaders and elected officials.</p> <p>United Way committee dedicated to planning and advancing advocacy and public policy.</p>	<p>Active alignment with community partners on policy priorities.</p> <p>Coalition building to advance community priorities aligned with Impact goals.</p> <p>Bills introduced, and/or supported, that result in changes in resources, implementation, and/or practices in key impact areas.</p> <p>Lobbyist on staff to monitor and act upon what is happening during state and local legislative sessions.</p>



## EQUITABLE COMMUNITY IMPACT

**Success Statement:** United Way provides equitable and sustainable solutions that address gaps and disparities to ensure that every person has access to the resources needed to thrive.



### Success Factor 4: Ensure Representation in all Work Related to Inclusion, Diversity, Equity and Access (IDEA)

Our United Way does not do this at this time.

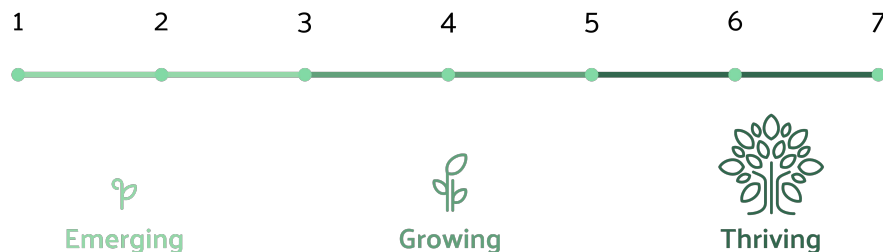
Our United Way should prioritize improvement in this area over the next 12 months.

I don't have enough information to assess this Success Factor.

**Use the key practices provided below to assess your United Way's performance on Success Factor 4:**

Emerging	Growing	Thriving
United Way staff, board members, and community volunteers have a shared understanding of, and support for, United Way's commitment to IDEA.	United Way incorporates IDEA into the organization, including in the strategic planning process, staff recruitment, policies and procedures, and organizational culture, to ensure all work reflects lived experiences of community members.	United Way is recognized as a leader in IDEA and embeds IDEA in all its organizational business practices to more effectively improve the quality of life for community members.

Select your rating below:



**Examples from my United Way:**

**Additional details on the success factor:**

**Success Factor Metric:** Existence of equitable, inclusive best practices across the United Way's operational and strategic work.

**Why this Success Factor is important:** A diversity of perspectives, centering those most affected, contributes new knowledge, evolves approaches and creates more effective solutions.

**Definitions and examples from other United Ways:**

Emerging	Growing	Thriving
<p>Equity education is made available to board and staff.</p> <p>Community learning sessions (e.g., 21-Day equity challenge).</p> <p>Board selection process and agency partner application process revised to increase inclusivity.</p>	<p>Diverse approaches and practices are in place to elicit and sustain representative community engagement in all impact-related work.</p> <p>Reflection of community voice in strategy design, including community participation in every stage in the process.</p> <p>Participatory grantmaking and community consulting to design funding investments and make grant awards.</p>	<p>Formal structures exist to create and sustain community participation.</p> <p>Active diversity committee and IDEA policies and procedures in place.</p> <p>Leadership/support of community-level IDEA initiatives to ensure all can thrive.</p>

## BRAND STRENGTH, AWARENESS AND RELEVANCE

**Success Statement:** United Way is the local, go-to resource for addressing critical community needs.



### Success Factor 1: Leverage United Way Brand Assets to Build a Strong Reputation Across Local Audiences and Channels

Our United Way does not do this at this time.

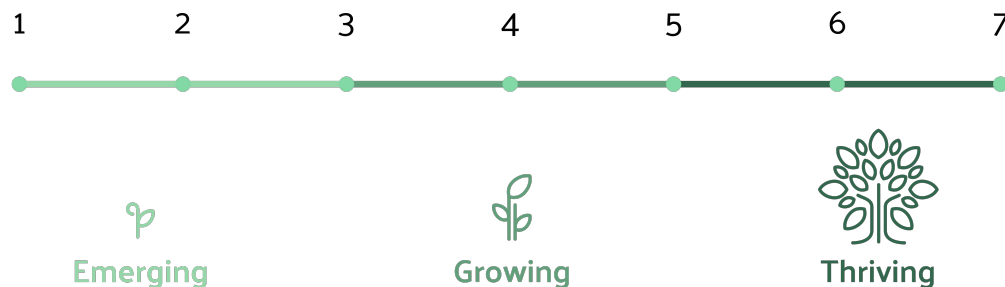
Our United Way should prioritize improvement in this area over the next 12 months.

I don't have enough information to assess this Success Factor.

**Use the key practices provided below to assess your United Way's performance on Success Factor 1:**

Emerging	Growing	Thriving
United Way adheres to United Way Worldwide brand guidelines and utilizes United Way Worldwide assets in local communications and marketing.	United Way increases channel followership and audience engagement through consistent, sustained expression of the United Way brand and use of brand messaging and assets.	United Way is recognized as the premier nonprofit organization in the community with channel followership and audience engagement surpassing that of local competitors.

Select your rating below:



Examples from my United Way:

**Additional details on the success factor:**

**Success Factor Metric:** Positive, measurable results achieved from use of United Way brand assets.

**Why this Success Factor is important:** Building and maintaining brand recognition and relevance is dependent on creating a consistent and understandable brand identity that is activated across multiple communications channels and audiences.

**Definitions and examples from other United Ways:**

Emerging	Growing	Thriving
All assets used, across all channels, are consistent with United Way Brand Guidance. Adoption of refreshed United Way Brand.	Regular assessment and augmentation of local brand assets, leveraging those published by United Way Worldwide. Advancing year-round campaigns to expand visibility beyond the traditional campaign cycle.	Tools and processes to monitor effectiveness of communications and marketing efforts. Use of results from past marketing and communications efforts to inform future activities.

## BRAND STRENGTH, AWARENESS AND RELEVANCE

**Success Statement:** United Way is the local, go-to resource for addressing critical community needs.



### Success Factor 2: Communicate Impact Results to Demonstrate Value and Drive Engagement

Our United Way does not do this at this time.

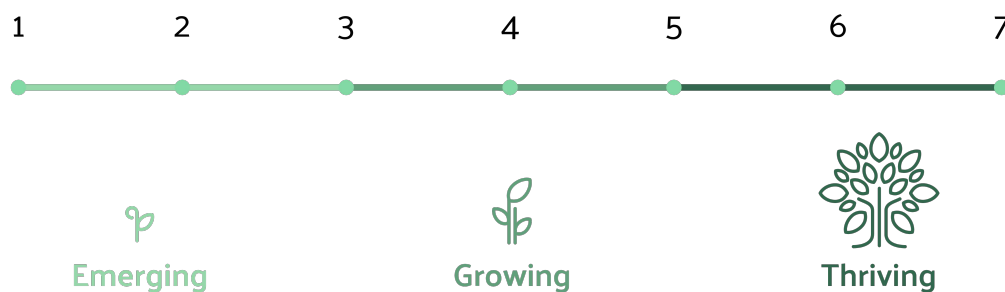
Our United Way should prioritize improvement in this area over the next 12 months.

I don't have enough information to assess this Success Factor.

**Use the key practices provided below to assess your United Way's performance on Success Factor 2:**

Emerging	Growing	Thriving
United Way shares key impact results with the community on one or more channels.	United Way regularly communicates impact results to stakeholders through storytelling on multiple channels.	United Way effectively communicates impact over time through powerful storytelling on multiple channels in conjunction with key indicators or community level dashboards.

Select your rating below:



**Examples from my United Way:**

**Additional details on the success factor:**

**Success Factor Metric:** Effective and consistent storytelling that shares impact results and data.

**Why this Success Factor is important:** Consistent and strategic storytelling and accountability reporting in the form of compelling communications tied to United Way's impact agenda is key to engaging and retaining the partners, donors and community advocates necessary to propel United Way's mission.

**Definitions and examples from other United Ways:**

Emerging	Growing	Thriving
<p>Dissemination of Impact stories on social media, in newsletters, on websites, and through blogs, podcasts and other effective channels.</p> <p>Capture stories from families and individuals served in order to market the United Way brand.</p> <p>Library of testimonials to share stories through social media, email newsletters, and on the website.</p>	<p>Communications and marketing efforts that feature the community as the "hero" to foster support for initiatives and investment.</p> <p>Quarterly impact stories shared with the board of directors and use this info to create web content.</p> <p>Monthly email impact reports to donors leveraging data snapshots and success stories.</p>	<p>Pursues media coverage opportunities that highlight the impact agenda.</p> <p>Ensure media coverage is informed by place and impact focus.</p> <p>Leverage data-informed dashboards with stories of the lives that the data reflect, always balancing storytelling with respect for the dignity of the community members served.</p> <p>Annual review of marketing strategy and assets to identify improvement.</p>

## BRAND STRENGTH, AWARENESS AND RELEVANCE

**Success Statement:** United Way is the local, go-to resource for addressing critical community needs.



### Success Factor 3: Engage the Community through Consistent and Proactive Marketing and Communications

Our United Way does not do this at this time.

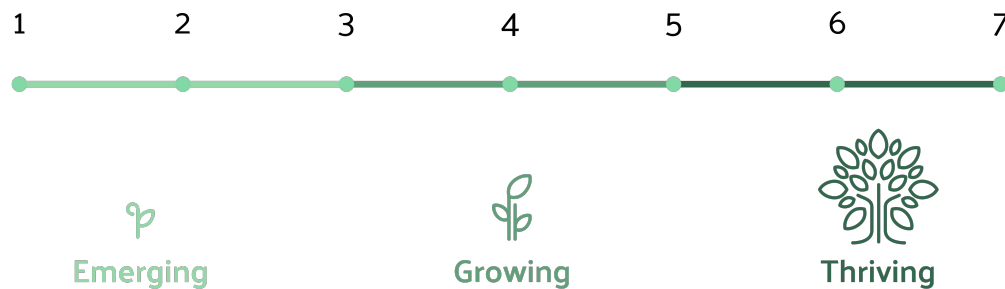
Our United Way should prioritize improvement in this area over the next 12 months.

I don't have enough information to assess this Success Factor.

**Use the key practices provided below to assess your United Way's performance on Success Factor 3:**

Emerging	Growing	Thriving
United Way consistently engages donors and the community on owned (e.g., website, blogs, newsletters) and shared (e.g., social media) channels.	United Way consistently engages donors and the community on owned, shared, paid (e.g., advertising), and/or earned (e.g., media coverage) channels.	United Way deploys a strategy for year-round, multi-channel marketing campaigns, across paid, earned, shared, and owned channels, that are segmented by audience.

Select your rating below:



Examples from my United Way:

**Additional details on the success factor:**

**Success Factor Metric:** United Way has a formal, multi-channel communications and marketing plan tied to its impact agenda.

**Why this Success Factor is important:** Strategic marketing and communications is often the gateway for attracting new and sustaining existing supporters.

**Definitions and examples from other United Ways:**

Emerging	Growing	Thriving
Identification of marketing and communications channels to activate and adoption of necessary tools to do so.	Development of engagement activities segmented by audience and channel.  Successful community presentations and campaign kick offs, media interviews.	Creation and consistent tracking of a year-round marketing and communications strategy.  Increasing volunteer and event participation and donations resulting from marketing and communications efforts.  End-of-year direct marketing campaigns.



## BRAND STRENGTH, AWARENESS AND RELEVANCE

**Success Statement:** United Way is the local, go-to resource for addressing critical community needs.



### Success Factor 4: Understand the Public Sector, Philanthropic and Social Landscape to Leverage Trends and Opportunities

Our United Way does not do this at this time.

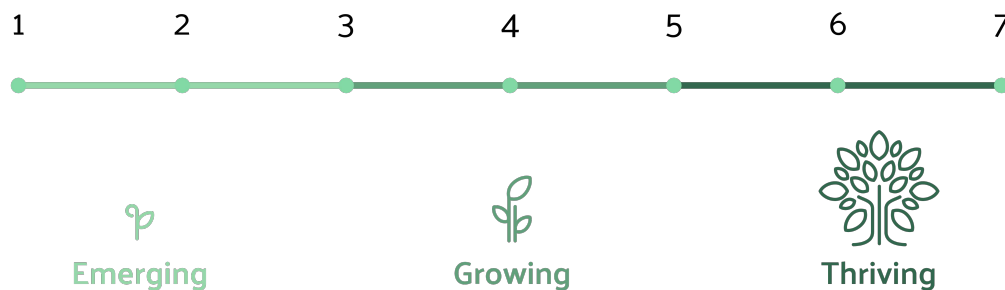
Our United Way should prioritize improvement in this area over the next 12 months.

I don't have enough information to assess this Success Factor.

**Use the key practices provided below to assess your United Way's performance on Success Factor 4:**

Emerging	Growing	Thriving
United Way regularly consults and uses community data to inform messaging.	United Way hosts regular community engagement opportunities and uses resulting data to enhance communications.	United Way consistently produces targeted messaging based on donor interests, community data and research on local giving trends.

Select your rating below:



**Examples from my United Way:**

**Additional details on the success factor:**

**Success Factor Metric:** Use of community data to inform communications and marketing efforts.

**Why this Success Factor is important:** Effective communication and engagement require a deep understanding of the people and organizations comprising the community, as well as trends informed by their characteristics and behavior.

**Definitions and examples from other United Ways:**

Emerging	Growing	Thriving
<p>Leverages community data and relationships to identify trends and opportunities to advance the United Way brand.</p> <p>Adopt a holistic approach when communicating about community needs and approaches.</p> <p>Use ALICE data, 211 data and local community metrics to inform communications and impact work.</p>	<p>Actively participates in community conversations and has a presence at the right tables to access data on trends and opportunities.</p> <p>Create and publish reports on pressing community issues and the organizations working to address them.</p>	<p>Communications efforts are focused on community issues and reflect community experiences.</p> <p>Capture and evaluate data around community perception and community engagement to create relevant messages.</p>

## DIVERSIFIED REVENUE STREAMS

**Success Statement:** United Way builds new revenue streams, strengthens its pipeline of donors, and focuses on future sustainability.



### Success Factor 1: Engage Staff and Volunteers in Fundraising Strategies

Our United Way does not do this at this time.

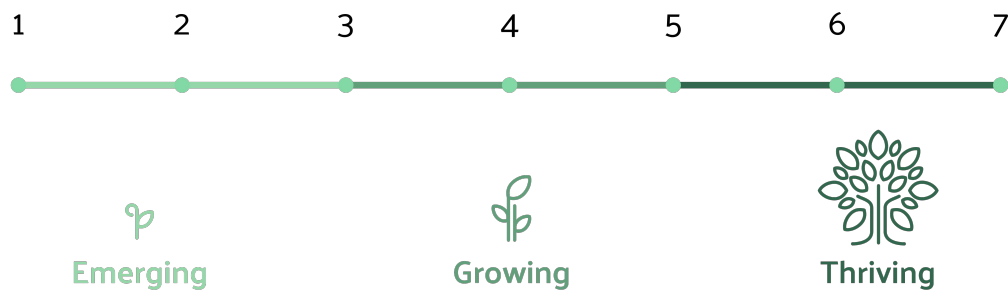
Our United Way should prioritize improvement in this area over the next 12 months.

I don't have enough information to assess this Success Factor.

**Use the key practices provided below to assess your United Way's performance on Success Factor 1:**

Emerging	Growing	Thriving
United Way trains and deploys volunteers to fundraise.	United Way has committees of trained volunteers with clear roles that raise funds from diverse donor segments.	United Way has volunteer fundraising committees with multi-year plans focused on long-term revenue generation from diverse sources.

Select your rating below:



Examples from my United Way:

**Additional details on the success factor:**

**Success Factor Metric:** Fundraising strategy priorities have formal volunteer committees and staff involvement in place (Potential KPIs: # of engagements, # of solicitations, \$ raised).

**Why this Success Factor is important:** Effective fundraising organizations mobilize their entire staff and board around generating resources for the mission, thereby expanding their reach, cultivation and retention of donors across all fundraising channels.

**Definitions and examples from other United Ways:**

Emerging	Growing	Thriving
<p>Appropriate and relevant training and staff support in place for individual volunteers.</p> <p>Hold regular sessions to inform staff of fundraising and community engagement work.</p>	<p>Staff (beyond the fundraising team) and volunteer job descriptions include clear fundraising responsibilities and goals.</p> <p>Sustainability &amp; Innovation Committee to support our brand and fundraising efforts.</p> <p>Committee for each major affinity group.</p>	<p>Documented and strategic approach to leveraging staff and volunteers for fundraising across all channels.</p> <p>Reimagined traditional "Campaign Cabinet" into vibrant volunteer group to engage donors, plan events, and co-staff networking opportunities.</p>

## DIVERSIFIED REVENUE STREAMS

**Success Statement:** United Way builds new revenue streams, strengthens its pipeline of donors, and focuses on future sustainability.



### Success Factor 2: Implement Year-round Donor Engagement and Fundraising Best Practices for Individual and Corporate Donors

Our United Way does not do this at this time.

Our United Way should prioritize improvement in this area over the next 12 months.

I don't have enough information to assess this Success Factor.

**Use the key practices provided below to assess your United Way's performance on Success Factor 2:**

Emerging	Growing	Thriving
United Way collects and uses data to develop segmented engagement strategies for corporate donors (e.g., business challenges, CSR strategies, etc.) and individual donors (e.g., demographics, work and personal contact information, interests, etc.).	United Way develops and implements engagement plans for multiple donor segments (e.g., duration of giving, giving capacity, issue of interest) based on data for corporate and individual donors.	United Way regularly adjusts its comprehensive corporate and individual donor engagement plan to include diverse offerings that increase alignment with donor interests.

Select your rating below:



  
Emerging

  
Growing

  
Thriving

**Examples from my United Way:**

**Additional details on the success factor:**

**Success Factor Metric:** Growing donor acquisition and retention rates, and average gift sizes year-over-year in key donor segments including employees, individuals, corporations, and affinity groups.

**Why this Success Factor is important:** Year-round engagement of donors and prospects provides multiple diverse opportunities to build a better understanding of United Way's work and impact, which in turn leads to stronger donor acquisition, engagement, upgrading and retention.

**Definitions and examples from other United Ways:**

Emerging	Growing	Thriving
<p>Use relevant technology (e.g., CRM, Andar, databases, etc.) to gather and maintain accurate donor data including to prioritize best potential prospects and engage them effectively.</p> <p>Analyze donor data for retention, churn, leadership, and new givers.</p>	<p>Uses actionable data to drive pipeline development and growth, including data on lapsed donors and wealth screening insights.</p> <p>Build or initiate a gift planning program for four basic planned gifts.</p> <p>Create new pipelines for donor acquisition (e.g. direct marketing at least annually, affinity groups, step-up programs, micro-campaigns).</p>	<p>Documented year-round communications and engagement plan for well-defined donor segments (e.g., loyal, leader, major and Tocqueville).</p> <p>Volunteer engagement built into resource development team to provide engagement opportunities for donors/prospective donors.</p> <p>Host regular (quarterly) donor engagement events including.</p>

## DIVERSIFIED REVENUE STREAMS

**Success Statement:** United Way builds new revenue streams, strengthens its pipeline of donors, and focuses on future sustainability.



### Success Factor 3: Activate Diverse, Sustainable Revenue Streams

Our United Way does not do this at this time.

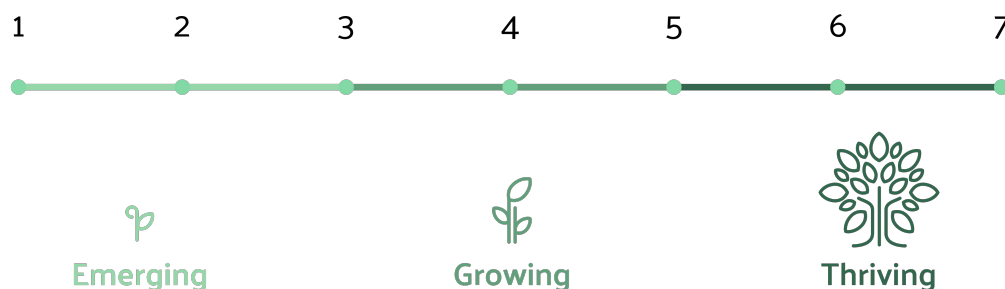
Our United Way should prioritize improvement in this area over the next 12 months.

I don't have enough information to assess this Success Factor.

**Use the key practices provided below to assess your United Way's performance on Success Factor 3:**

Emerging	Growing	Thriving
United Way commits to pursuing diverse revenue sources and gathers and analyzes data to develop understanding of, and opportunities related to, funding from companies, foundations, government, high-net-worth individuals and other partners.	United Way develops and implements an annual plan to diversify its revenue by supplementing philanthropic giving with other sources (e.g., foundations, fee-for service, program-based revenue goals).	United Way develops and regularly adjusts a multi-year Revenue Diversification plan that includes fundraising goals for specific revenue sources to ensure a more balanced portfolio.

**Select your rating below:**



**Examples from my United Way:**

**Additional details on the success factor:**

**Success Factor Metric:** United Way has a fundraising strategy that includes a well-distributed portfolio of diverse revenue sources in key areas including target increases in revenue attributed to and identified from different revenue streams.

**Why this Success Factor is important:** A diversified and sustainable revenue portfolio, encompassing individual donors, employees/companies, foundations, government, direct and fee-for-service, is key to ensuring that United Way will have access to resources necessary to adapt to external changes and invest strategically in high-impact work.

**Definitions and examples from other United Ways:**

Emerging	Growing	Thriving
<p>Formal plan to develop new and diverse revenue streams, while continuing to track and improve existing efforts.</p> <p>Training for staff and volunteers to develop necessary skills for identifying, cultivating and stewarding new revenue sources.</p>	<p>Leverage Network to develop regional/statewide fundraising and impact strategies through collaborative proposals and partnerships.</p> <p>Augment corporate partnerships to lead to more individual fundraising practices (employees becoming donors outside of the workplace).</p> <p>Actively pursue new foundations and government grants from local, regional and global organizations.</p>	<p>Formalized process for board level review of revenue diversification plan progress.</p> <p>Incorporation of revenue diversification and growth goals into strategic plan.</p>



## DIVERSIFIED REVENUE STREAMS

**Success Statement:** United Way builds new revenue streams, strengthens its pipeline of donors, and focuses on future sustainability.



### Success Factor 4: Leverage Community Impact Success to Amplify Diverse Fundraising Efforts

Our United Way does not do this at this time.

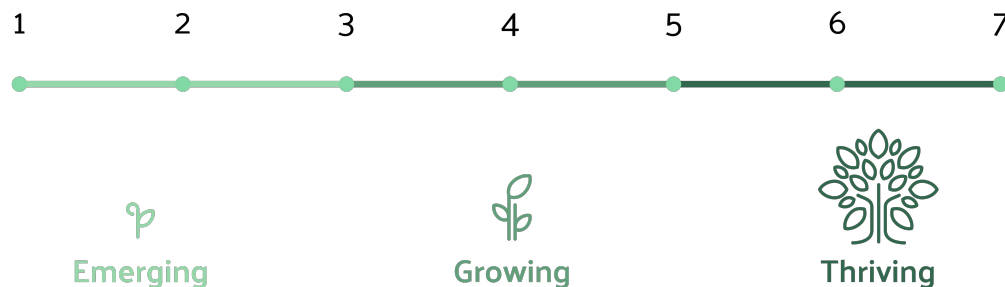
Our United Way should prioritize improvement in this area over the next 12 months.

I don't have enough information to assess this Success Factor.

**Use the key practices provided below to assess your United Way's performance on Success Factor 4:**

Emerging	Growing	Thriving
United Way develops and uses a general case for support with donors that describes United Way's effectiveness and relevance in addressing community issues.	United Way develops and uses customized cases for support and related materials that are tailored to donor interests and that describe specific impact efforts addressing targeted community issues.	United Way regularly leverages the success of existing and emerging Impact work to refine its case(s) for support and improve its efforts to attract and grow diverse revenue sources.

Select your rating below:



**Examples from my United Way:**

**Additional details on the success factor:**

**Success Factor Metric:** Leveraging a case of support that drives impact and return on investment, measured by number of donors and dollars raised for significant impact strategies and initiatives with documented evidence of success (e.g. data, stories, partners engaged).

**Why this Success Factor is important:** Social impact organizations must commit to creating and sharing compelling information about the impact they generate to establish support, grow resources and secure brand relevance.

**Definitions and examples from other United Ways:**

Emerging	Growing	Thriving
<p>Case for support that is clear, specific and focuses on local activities to address documented needs in the community that resonate with donors and prospective donors.</p> <p>Use success stories to show the return on investment to drive more donor/corporate investments.</p>	<p>Include evidence of impact success to tailor messages, documents, and other means of communications and outreach to diverse fundraising audiences.</p> <p>Customize stories and case studies for specific audiences.</p> <p>"Donor first fundraising cycle" strategy to make customized asks to donors based on their "why".</p>	<p>Build year-round donor communication plans that focus on impact success.</p> <p>Ensure evidence of impact success (e.g., data, stories, partners engaged) is regularly updated.</p>

## STRONG ORGANIZATIONAL FOUNDATION

**Success Statement:** United Way's core capacities and values create enduring success enabling it to be agile, adaptive, sustainable and relevant.



### Success Factor 1: Establish and Maintain Strong Financial Standards and Data-informed Operational Efficiency

Our United Way does not do this at this time.

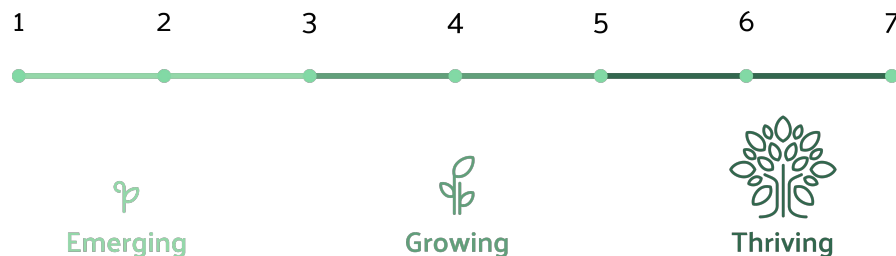
Our United Way should prioritize improvement in this area over the next 12 months.

I don't have enough information to assess this Success Factor.

**Use the key practices provided below to assess your United Way's performance on Success Factor 1:**

Emerging	Growing	Thriving
United Way documents and adheres to policies that meet all local, state, and federal regulatory and governmental requirements.	United Way enhances its financial, governance, and fiduciary policies and collects relevant data to improve risk management practices.	United Way conducts a data-informed evaluation, at least annually, of the organization's financial health, financial metrics, and financial policies and learns, course corrects, and takes action (e.g., asset audit recommendations, considers new accreditations, etc.).

Select your rating below:



**Examples from my United Way:**

**Additional details on the success factor:**

**Success Factor Metric:** Documented internal controls and operational policies that are reviewed annually.

**Why this Success Factor is important:** Effective governance, oversight and operational efficiency is rooted in the creation of policies, processes and controls.

**Definitions and examples from other United Ways:**

Emerging	Growing	Thriving
<p>Completion of government regulatory or mandatory reports, such as 990 or equivalent.</p> <p>Annual audit/financial statement.</p>	<p>Timely (monthly) financial reports generated and reviewed by board and credentialed accountant.</p>	<p>Comprehensive internal controls based on industry best practice that support optimal and accountable operations.</p> <p>Use of financial dashboards, regular reporting, and evaluation of financial health to provide real time updates related organizational health and impact.</p>

## STRONG ORGANIZATIONAL FOUNDATION

**Success Statement:** United Way's core capacities and values create enduring success enabling it to be agile, adaptive, sustainable and relevant.



### Success Factor 2: Ensure an Effective and Adaptable Governance Model

Our United Way does not do this at this time.

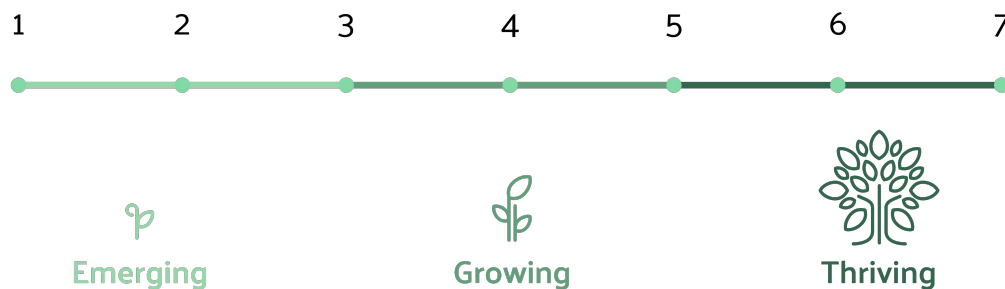
Our United Way should prioritize improvement in this area over the next 12 months.

I don't have enough information to assess this Success Factor.

**Use the key practices provided below to assess your United Way's performance on Success Factor 2:**

Emerging	Growing	Thriving
United Way has a formal board governance onboarding process that leverages documented board roles, leadership principles, committee descriptions and responsibilities, strategic plan, and a reporting schedule on finances and progress on organizational priorities.	United Way employs a regular board-led process to assess the equitable composition and effectiveness of the board in addressing evolving challenges and opportunities facing the organization.	The United Way board and its executive leadership work collaboratively to prioritize time on strategy to set long-term vision and direction, grow revenue and donors, and measure performance of the organization.

**Select your rating below:**



**Examples from my United Way:**

**Additional details on the success factor:**

**Success Factor Metric:** Conducts annual review of board effectiveness and engagement.

**Why this Success Factor is important:** Board members are the fiduciaries who steer the organization towards a sustainable future by adopting sound, ethical, and legal governance and financial management policies, as well as by making sure the nonprofit has adequate resources to advance its mission. Ensuring that boards are effective and engaged is key to local United Way success.

**Definitions and examples from other United Ways:**

Emerging	Growing	Thriving
Board handbook that includes training and development plan, and guiding principles for leadership.	<p>Plan and resources for activating an engaged board of directors.</p> <p>Regular use of a diversity matrix to match demographics of board to the community.</p> <p>Governance committee meets regularly and conducts an annual self-assessment and feedback survey to source improvement projects.</p>	<p>Planned series of educational activities and strategic discussions throughout the year.</p> <p>Board organizational scorecard and/or survey that includes percentage of time engaged in strategic discussion.</p>

## STRONG ORGANIZATIONAL FOUNDATION

**Success Statement:** United Way's core capacities and values create enduring success enabling it to be agile, adaptive, sustainable and relevant.



### Success Factor 3: Board and Staff to Drive United Way Performance Using Relevant Resources and Technology

Our United Way does not do this at this time.

Our United Way should prioritize improvement in this area over the next 12 months.

I don't have enough information to assess this Success Factor.

**Use the key practices provided below to assess your United Way's performance on Success Factor 3:**

Emerging	Growing	Thriving
United Way has a strategic plan, an aligned annual plan, and processes that drive performance (e.g., pledge processing, donor cultivation, allocations).	United Way leverages professional expertise (e.g., legal, insurance, finance, etc.), related technology systems, and documented policies to effectively manage key business functions and risk.	United Way regularly assesses and acts upon opportunities to better leverage advancements in technologies and data-driven insights to improve its policies, performance, and risk management.

Select your rating below:



  
Emerging

  
Growing

  
Thriving

**Examples from my United Way:**

**Additional details on the success factor:**

**Success Factor Metric:** Existence of a strategic plan, scorecard and processes that are enabled by technology to drive performance improvement.

**Why this Success Factor is important:** Strategic plan development, including the adoption of a process to monitor progress and make necessary adjustments, is a foundational component of organizational success.

**Definitions and examples from other United Ways:**

Emerging	Growing	Thriving
<p>Regular strategic plan reporting and inspection of activities to identify opportunities for improvement.</p> <p>Establishing measurable goals aligned to strategic plan.</p>	<p>Employs internal or United Way Worldwide-provided technology (e.g. business intelligence and data modeling tools, Performance Link, etc.) to provide actionable insights.</p> <p>Project management capacity or skill development.</p> <p>Ability to track and manage customer relationships (e.g. CRM management database and/or platform).</p>	<p>Stringent technology and cyber security policies and procedures to evaluate and mitigate risk to the organization.</p> <p>Formation of an IT/Data Committee.</p>



## STRONG ORGANIZATIONAL FOUNDATION

**Success Statement:** United Way's core capacities and values create enduring success enabling it to be agile, adaptive, sustainable and relevant.



### Success Factor 4: Build an Equitable, Agile and Forward-Thinking Culture

Our United Way does not do this at this time.

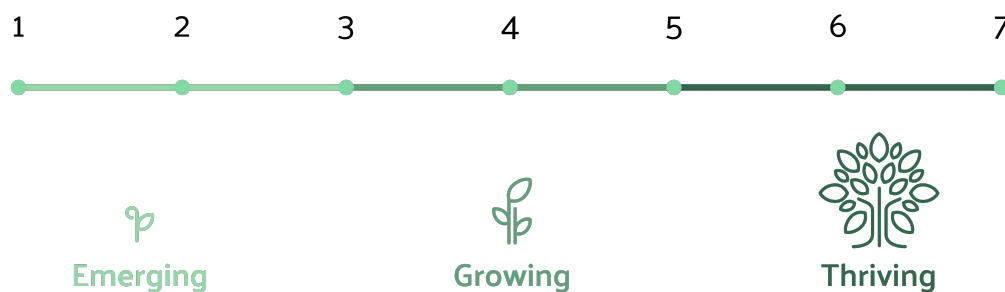
Our United Way should prioritize improvement in this area over the next 12 months.

I don't have enough information to assess this Success Factor.

**Use the key practices provided below to assess your United Way's performance on Success Factor 4:**

Emerging	Growing	Thriving
United Way establishes inclusive policies and practices to guide and protect the organization, its staff, and volunteers.	United Way creates human resource policies and procedures to encourage retention, growth, and development of key staff and volunteers.	United Way regularly assesses and identifies its future needs and develops new staff and board roles and structures necessary for an agile, forward-thinking culture.

Select your rating below:



**Examples from my United Way:**

**Additional details on the success factor:**

**Success Factor Metric:** Adoption of a cultural values statement that is assessed with board and staff annually.

**Why this Success Factor is important:** A strong culture leads to a stronger organization and a more equitable environment.

**Definitions and examples from other United Ways:**

Emerging	Growing	Thriving
Human resources practices are aligned with organizational values and culture.  Annual board review and update of Human Resources policy and guidelines.	Strategic development of a cultural values statement with board and staff participation.  Inclusion of staff, board and community volunteers/partners in organization culture building and support.  measures planned and unplanned staff retention and reports these metrics.	Regular learning opportunities (e.g., performance reviews, DEI trainings, internal training sessions, educational stipends) to engage board, staff and volunteers in culture building.

## NETWORK CITIZENSHIP

**Success Statement:** We are a global force for good when we show up for one another—accountable and collaborative—contributing diverse ideas to operate as one global network.



### Success Factor 1: Follow United Way Worldwide Membership Accountability Practices and Procedures

Our United Way does not do this at this time.

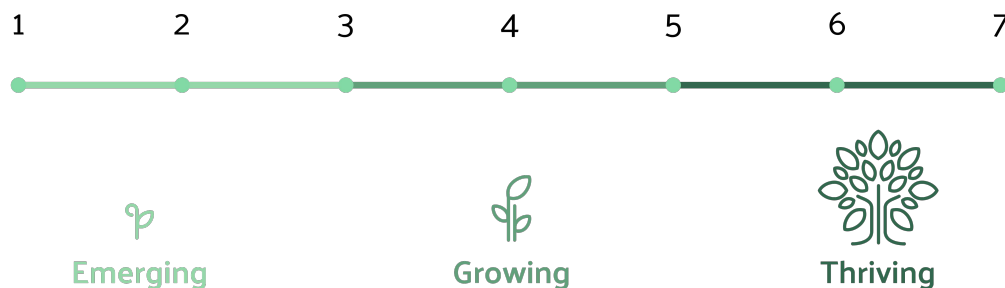
Our United Way should prioritize improvement in this area over the next 12 months.

I don't have enough information to assess this Success Factor.

**Use the key practices provided below to assess your United Way's performance on Success Factor 1:**

Emerging	Growing	Thriving
United Way completes the annual membership certification process, including the leading practices sections, in whole and on time.	United Way models accountability and transparency by providing the public with online access to annual 990 and audit, board roster, mission and DEI statements, and other accountability documents.	United Way's operating policies and practices demonstrate United Way Worldwide's membership requirements and are a model for other United Ways to emulate.

Select your rating below:



Examples from my United Way:

**Additional details on the success factor:**

**Success Factor Metric:** United Way is a United Way Worldwide member in good standing.

**Why this Success Factor is important:** United Way compliance with United Way Worldwide member requirements ensures it is operating in a way that upholds the reputation of the network while pursuing its local mandate.

**Definitions and examples from other United Ways:**

Emerging	Growing	Thriving
<p>Prioritize the Membership Certification process and make it a learning and engagement opportunity for staff and board members.</p> <p>Mission statement that is consistent with the United Way system mission.</p>	<p>Posting of accountability documents on website and documented process by which public inquiries will be addressed.</p>	<p>Policies and practices that honor both the spirit and letter of United Way Worldwide membership requirements.</p> <p>Conduct organization in a way that is purposeful, responsible, trusting, and accountable.</p>

## NETWORK CITIZENSHIP

**Success Statement:** We are a global force for good when we show up for one another—accountable and collaborative—contributing diverse ideas to operate as one global network.



### Success Factor 2: Actively Contribute to Network, Local and Regional Collaborations and Offerings

Our United Way does not do this at this time.

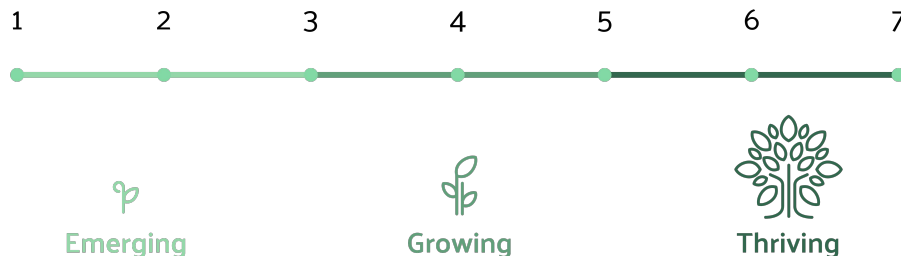
Our United Way should prioritize improvement in this area over the next 12 months.

I don't have enough information to assess this Success Factor.

**Use the key practices provided below to assess your United Way's performance on Success Factor 2:**

Emerging	Growing	Thriving
United Way actively seeks and provides support to neighboring United Ways (e.g., participates in State Associations).	United Way consistently shares effective practices and learnings with other United Ways through conferences, trainings, surveys and other opportunities.	United Way plays a leadership role in originating and sharing best practices and learnings widely across the Network (e.g., Network Advisory Council, Best Practices & Innovations Project Team, regional and state conference planning committees, functional working teams, etc.).

Select your rating below:



**Examples from my United Way:**

**Additional details on the success factor:**

**Success Factor Metric:** Number of high-quality Network learning and sharing opportunities that the United Way contributes to and/or participates in annually.

**Why this Success Factor is important:** Actively contributing to the Network means welcoming opportunities for alignment and collaboration that benefit the Network as a whole and building trusting relationships and learning opportunities with other United Ways through consistent communication.

**Definitions and examples from other United Ways:**

Emerging	Growing	Thriving
<p>Participating in a State Association or sub-state convenings.</p> <p>Contacts United Ways that are addressing similar challenges to learn from their experience.</p>	<p>Participating in optional data sharing and opportunities to enrich Network learning.</p> <p>Participation in Network learning/events (e.g. Regional Conferences, UWW trainings, etc.).</p> <p>Adoption of best practices from other United Ways.</p>	<p>Actively contributes to the Network by learning about and appreciating strengths of other United Ways, harnessing knowledge and expertise, and commitment to collective learning.</p> <p>Serve on planning committees for Network events or initiatives.</p> <p>Other local United Ways adopt best practices from your organization.</p>

## NETWORK CITIZENSHIP

**Success Statement:** We are a global force for good when we show up for one another—accountable and collaborative—contributing diverse ideas to operate as one global network.



### Success Factor 3: Strive to Partner and Collaborate with Other United Ways Across the Network

Our United Way does not do this at this time.

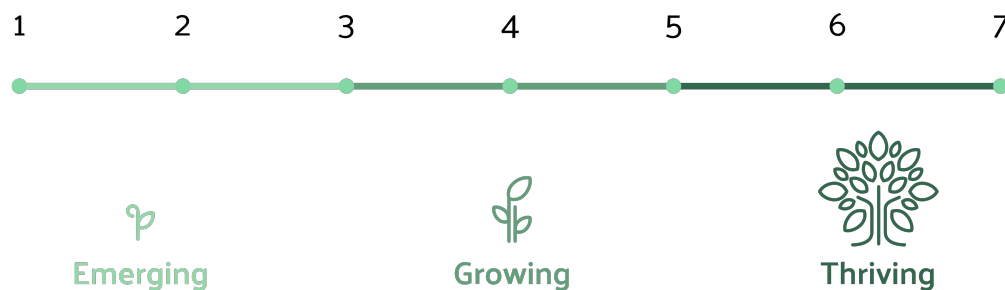
Our United Way should prioritize improvement in this area over the next 12 months.

I don't have enough information to assess this Success Factor.

**Use the key practices provided below to assess your United Way's performance on Success Factor 3:**

Emerging	Growing	Thriving
United Way initiates and shares opportunities for potential partnerships with other United Ways.	United Way regularly partners with other United Ways to meet the needs of donors, corporate partners, and other organizations that cross United Way markets.	United Way regularly leads and actively participates in advancing cross-United Way collaborations and initiatives that model the power and scale of the Network.

Select your rating below:



Examples from my United Way:

**Additional details on the success factor:**

**Success Factor Metric:** Regularly cultivating intentional and formal agreements, contracts and partnerships with United Way Worldwide and other United Ways in the Network.

**Why this Success Factor is important:** A collaborative United Way is one that seeks out, and participates in, network-wide and cross-market opportunities that model the One Network approach necessary to United Way's success.

**Definitions and examples from other United Ways:**

Emerging	Growing	Thriving
<p>Has the capacity and skills to serve in partnership with another United Way to meet the needs of a partner outside of their market.</p> <p>Use of United Way Worldwide tools designed to enhance shared accountability in partnership design (agreements, templates, MOUs, etc.).</p> <p>Responds in a timely manner to invitations to partner that are extended by other United Ways.</p>	<p>Adopts a non-internal focus when assessing opportunities to partner.</p> <p>Balances the need to collaborate and contribute with Network while addressing local issues.</p> <p>Builds a shared understanding of partnerships, with clear roles and responsibilities, as well as plans to ensure partnership sustainability.</p> <p>Develops a practice of forging agreements and building consensus.</p>	<p>Actively seeks opportunities to partner with other United Ways to build things together at a regional, national or global scale.</p> <p>Actively champions collaborations and advancing them through promotion and ambassadorship across the Network (e.g., 211, ALICE, etc.).</p> <p>Participate in and lead statewide initiatives and affinity groups.</p> <p>Provides or participates in shared services.</p>



## NETWORK CITIZENSHIP

**Success Statement:** We are a global force for good when we show up for one another—accountable and collaborative—contributing diverse ideas to operate as one global network.



### Success Factor 4: Engage with Global United Way Network to Create a Culture of Trust

Our United Way does not do this at this time.

Our United Way should prioritize improvement in this area over the next 12 months.

I don't have enough information to assess this Success Factor.

**Use the key practices provided below to assess your United Way's performance on Success Factor 4:**

Emerging	Growing	Thriving
United Way benefits from being part of a global Network by using assets and supports provided by other United Ways and/or United Way Worldwide.	United Way engages in regular communication and feedback opportunities with other United Ways and United Way Worldwide to grow understanding, durable connections, and trust.	United Way adopts and promotes Network-wide cultural and operating standards to ensure the United Way Network is impactful, relevant, and sustainable.

Select your rating below:



Emerging

Growing

Thriving

**Examples from my United Way:**

**Additional details on the success factor:**

**Success Factor Metric:** Adoption and observance of a Network culture measure developed by the Culture Task Force that addresses the need for standardized practices across the Network, as well as behaviors that need to stay highly localized.

**Why this Success Factor is important:** Organizations recognized by their peers for exemplary collaboration and contribution are trusted and committed to collective advancement of the whole. Practices that provide clear agreement for roles, boundaries and responsibilities are a gateway for culture of trust, providing a foundation for knowing how things are going to operate.

**Definitions and examples from other United Ways:**

Emerging	Growing	Thriving
Agree and articulate to stakeholders that there is a value in being part of a Network (both United Ways and United Way Worldwide).	Seeks to understand and address differences in practice across United Way markets and unique approaches that are needed by local communities.  Participate in strategic conversations to establish standardized practices where appropriate.	Joint accountability and collective commitment to system-wide risk and performance management.  Adoption of Network standardization efforts in appropriate ways.  Actively participate in developing and advancing the Network-wide culture developed by the Culture Task Force.