

THE MOBILIZATION PATHWAY: EXECUTING ON UNITED WAY'S BUSINESS MODEL

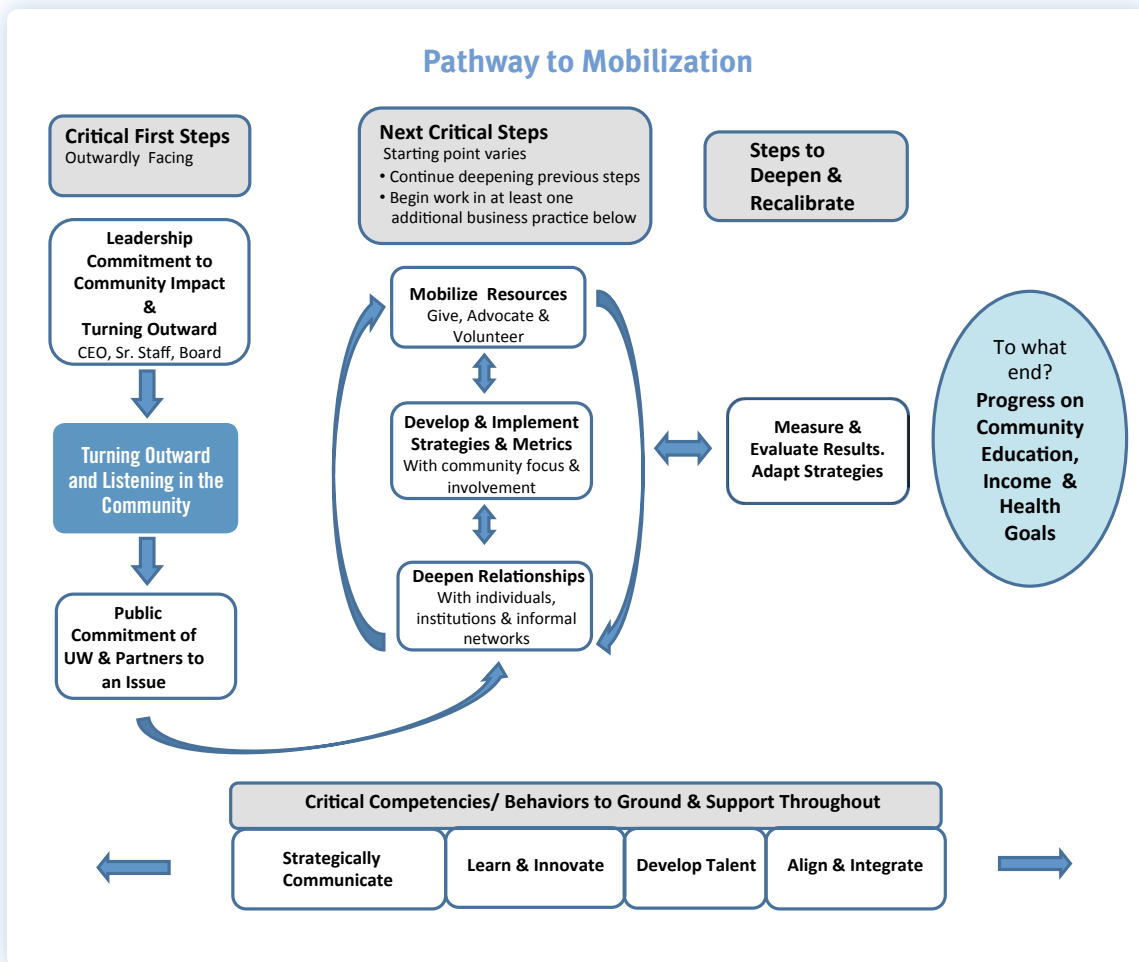


TURNING OUTWARD AND LISTENING IN THE COMMUNITY A FIRST STEP TO ENGAGE AND ALIGN WITH THE COMMUNITY AROUND A CAUSE

Mobilization Groups, which began in 2010, have been on a journey to implement the United Way business model. Mobilization Groups are learning cohorts of United Ways committed to bringing individuals and institutions – nonprofits, community members, businesses, media, the public sector, and more – together around collective goals in education, income and health.

Early adopters have learned much about what it takes to make progress on their community's long-term goals in education, income and health; engage more people and institutions with opportunities to give, advocate and volunteer; and increase revenue and resources.

From the journey and learning of more than 40 United Ways who have participated in the first Mobilization Groups, a clear pathway to implementing United Way's business model has emerged. **The pathway lays out the sequencing of different elements of the business model.** This series provides an overview, guidance on how to get started, examples, and additional resources in each of the steps along the Pathway to Mobilization.



TURNING OUTWARD AND LISTENING IN THE COMMUNITY

The path to community change starts with a strong *leadership commitment* to both community impact and turning outward. That commitment is then put into action by actually *turning outward and listening in the community*.

This installment of the Mobilization Pathway series illustrates how to begin executing on the first element of United Way's business model: *Engage and align with the community around a cause*.

HOW IT BEGINS

When Mobilization Groups began their journey, they learned about *turning outward* from United Way's partner The Harwood Institute for Public Innovation, who developed this concept. What turning outward means is to focus *first* on the aspirations of your community – not your organization. While it is often natural to focus on your organization first, focusing on your community first helps set a “north star,” a guiding point, for your work – both at United Way and across the community.

Turning outward means listening to diverse groups of people across your area to gain an understanding of their aspirations for the community. Once you have done this, you can continually factor the growing understanding of the community's aspirations and concerns into all of your work. For Mobilization Group United Ways, this has had many meaningful implications.

Mobilization Group United Ways have begun to engage and align with their communities in new ways, including:

- Facilitating diverse community conversations
- Developing an understanding of public will in their communities
- Deepening their knowledge of their communities
- Connecting this new knowledge of their communities to their impact strategies
- Building new relationships with individuals and institutions

BENEFITS OF TURNING OUTWARD

- Gives us knowledge of what the community is thinking and feeling
- Is the first step in mobilizing
- Builds new relationships with institutions and individuals
- Enhances our reach to diverse community members
- Helps reposition United Way in the eyes of others
- Gives us language for how people talk
- Provides a way for the staff and board to work cross-functionally and experience alignment

GETTING STARTED

You must tailor the experience of *turning outward* and *engaging and aligning the community around a cause* to best fit your community. Some common steps among Mobilization Group United Ways included:

1. Discuss aspirations with their United Way staff and board

After deciding to commit to turning outward, **United Way of Silicon Valley** began with community conversations that engaged their staff. They used three simple questions from The Harwood Institute's *Aspirations Tool* <http://online.unitedway.org/file.cfm?fid=3080160> to begin:

- What are your aspirations for your community?
- What challenges do we face in reaching those aspirations?
- What needs to change in the community to reach those aspirations?

This simple task opened the mobilization team's eyes to a different perspective, one more centered on the community. They did this on three different occasions to enable all staff to participate. The board also discussed the aspirations questions. Most importantly, this step helped United Way staff build confidence in their ability to engage the community and facilitate community conversations.



2. Facilitate diverse community conversations

Next, in Silicon Valley, several mobilization team members began facilitating community conversations with groups of individuals with whom they were familiar and comfortable. One member chose to facilitate a community conversation with members of his church. They used the guidance, including a facilitator's agenda, offered in The Harwood Institute's *Community Conversation Toolkit* <http://online.unitedway.org/file.cfm?fid=3069541>.

After contacting a group or organization they were comfortable with to set up a community conversation, Silicon Valley identified staff to host the conversation. They paid particular attention to the role of facilitator, making sure it was someone the group would feel comfortable with. Similarly, United Way of San Diego, who was also doing conversations, chose a facilitator who could speak Spanish for a conversation in a primarily Latino neighborhood.

It is important to note that each community conversation, whether with staff, board or any other constituent, needs two note takers – one to transcribe word for word as closely as possible, one to note the tone, mood and other non-verbal cues happening throughout the conversation. The note takers play an important role in capturing what participants say. These notes, in addition to providing a fresh perspective, highlight language people actually use to describe the challenges in their community. Capturing exact phrasing while avoiding paraphrasing into one's own words is critical for note takers because it ensures they are listening.

After getting the hang of facilitating, mobilization team members began to train additional staff and board members to facilitate, and encouraged all staff and board members to be note takers or observers in community conversations. This provided an outstanding opportunity for staff to work together in a cross-functional manner – a critical aspect of mobilizing a United Way to turn outward.

After engaging various groups of interest and constituencies in their community, United Way Silicon Valley had a deeper knowledge of what their community was thinking and feeling that not many other organizations shared. Though they had often utilized research and statistical data – “expert knowledge” – to advance their work, this was their first time to incorporate what they learned from engaging the community – “public knowledge” – into their work.

3. Develop an understanding of public will in their communities

At the same time, United Way of Acadiana in Lafayette, Louisiana, was also doing community conversations. They were faced with a very important upcoming school board election in Lafayette Parish, so they first used conversations to ask people about their aspirations for the community around education and what questions they would like to ask potential school board candidates.

United Way of Acadiana was then able to theme what they heard from the community conversations. United Way and its partners in LaPESC (*Lafayette Public Education Stakeholders Council*) took the themes they heard and used them to host a series of public forums with School Board candidates and frame the questions asked. The public felt that their questions and concerns were well-represented in the candidate debate. The United Way and LaPESC were able to build relationships with all the candidates and thus were able to have ready access to those who were ultimately elected. A number of these folks now regularly call and value United Way as a resource. And, most of all, there became a heightened sense of awareness and discussion about the education issues facing the community.

By sharing publicly what they heard from the community about aspirations and education, United Way of Acadiana was increasingly recognized as having both issue expertise and firsthand knowledge of the community and public will. When the Lafayette superintendent announced that he was resigning, the local newspaper called on United Way CEO Margaret Trahan to give an opinion on what the community might be looking for in a new superintendent, because of her role as the spokesperson for the education coalition LaPESC (*Lafayette Public Education Stakeholders Council*).

The school board decided to then hold public forums on this topic, and United Way offered and was ultimately accepted to facilitate those meetings. Margaret was also named as one of two community representatives to the superintendent search committee. Thus, because of United Way's commitment and their understanding of their community's public will for education, their reach and influence in the sphere of education have increased dramatically.

When United Way of Acadiana had the opportunity to further the dialogue by showing *Waiting for Superman*, a movie about education, they were able to use their knowledge about the community's public will to confidently explore the opportunity. The newspaper, thanks to the involvement of the newspaper's publisher in community conversations, hosted the movie screening. United Way facilitated a community conversation after the screening and a discussion about the state of education in Lafayette Parish. They could accept the invitation to facilitate without fear of political repercussions because of the confidence they had gained from being out in the community and because of their emerging reputation for lifting up all voices. Newspaper articles covering the event reinforced United Way's presence and role.

IDENTIFYING THEMES AND IMPLICATIONS FROM COMMUNITY CONVERSATIONS

A great resource for learning how to theme conversations is available here, a webinar hosted by a Harwood coach. (https://www.adobeconnect.com/_a17179333/p1tmdrn7j7g/)

4. Deepen their knowledge of their communities

Just as community conversations helped United Ways develop an understanding of public will, they also helped deepen their knowledge of the community. During a Chili Cook-off, an annual fundraising event run by a company which attracts hundreds of people in the community, United Way of Acadiana staff acted as roving reporters, engaging with participants and asking them four questions about their aspirations for their community. They dubbed this activity “Ask Acadiana.”

Secondly, CEO Margaret Trahan strategically built or deepened her relationships with all the school superintendents in her area. She framed her discovery visits around listening, getting to know the superintendents as people, asking about aspirations and the challenges they were most facing in their school districts. Margaret’s behavior of listening and asking sincere questions demonstrated the interest of United Way of Acadiana in education, without her having to deliver prepared talking points or share any printed materials. These visits became the foundation for subsequent interactions and collaborations.

QUESTIONS FOR A SCHOOL SUPERINTENDENT DISCOVERY VISIT

To see the questions Margaret asked on these discovery visits, visit: <http://online.unitedway.org/index2.cfm?aid=6669>.

5. Share broadly what is learned

Once United Ways got great information from the community conversations, and themed it, they found many ways to apply this new knowledge. For United Way of Acadiana, they immediately saw an opportunity to revamp their campaign video <http://vimeo.com/13544069> so that it focused on people sharing real aspirations and concerns for the community.

United Way of Central Ohio intentionally looked for opportunities to share what they learned from community conversations. Because of their sincere efforts to engage hundreds of community members from diverse backgrounds, they were able to genuinely reflect and represent the real aspirations, interests and concerns of their community. The Columbus superintendent of schools was so impressed by what she heard that she invited United Way to share these community perspectives on education with her leadership cabinet and then subsequently with all school principals across the district.

A few United Ways found it helpful to develop a report to share the information they learned from engaging their community. Modeled after the national report *Voices for the Common Good: America Speaks Out on Education* <http://www.unitedway.org/blog/entry/voices-for-the-common-good-america-speaks-out-on-education/>, Acadiana, San Diego and Toledo published reports:

- Voices for the Common Good: Acadiana Speaks Out on Education <http://www.unitedwayofacadiana.org/Files/Publications/VOICES-final.pdf>
- Voices for the Common Good: San Diego Speaks Out on Education http://liveunitedsd.org/sites/default/files/file/UWSD_Education_Report.pdf
- Voices for the Common Good: Toledo Speaks Out on Education unitedwaytoledo.org/townhall

Another approach was created by United Way of Santa Fe County, melding research and expert knowledge with public knowledge gained from conversations with more than 300 people: <http://www.uwsfc.org/mobilize-for-educational-excellence>

More important than doing the report, though, was finding creative ways to share what was in the report. For United Way of Acadiana, they were able to share the findings from their report at an education summit attended by many community leaders involved in the issue. The report helped inform events and media interviews as well as opened many new doors.

6. Build or deepen relationships with individuals and institutions

For Sarah Berthelot, who leads resource development at United Way of Acadiana, the concept of turning outward has re-shaped relationship building with major donors and corporations. Instead of United Way staff showing up to talk about the United Way’s community impact agenda and the work United Way is doing, those relationships now begin very differently with trying to uncover what individuals and companies care about and what most resonates with them. For the 2011 corporate calls, the team created a corporate call notepad with five questions about philanthropic goals, what kind of community they wanted to see and what changes they thought needed to be made to achieve that. The responses were then tracked and analyzed for connections with United Way of Acadiana’s interests and areas of focus.

QUESTIONS TO ASK DURING CORPORATE CALLS

To see the tool Sarah used during 2011 corporate calls, visit: <http://online.unitedway.org/file.cfm?fid=3105499>.

7. Connect this new knowledge of their communities to their impact strategies

As part of the mobilization work, United Way of Acadiana knew they needed to revamp their strategic thinking about their volunteer center so it could better support their education work. They decided that one of the first steps would be to have conversations with groups of stakeholders to get a better feel for what the different players cared about and what were their aspirations for the future. This proved to be very valuable later on as the United Way made strategic decisions about what volunteer opportunities to pursue – and what ones to say no to. It also allowed those most directly involved to feel that they had a voice in the process.

As the direct result of discovery visits, the Lafayette superintendent approached the United Way to partner with the school district on its “100+ Volunteer” effort to get more community members actively engaged in the schools. Since this kind of partnership directly aligned with both United Way’s new volunteer engagement strategy and their education strategy around early grade reading, they saw great value and now are implementing a very active partnership. They have now launched a United Way Readers program which has attracted numerous volunteers for education and are participating in the national call for One Million Volunteer Readers, Tutors and Mentors.





UNITED WAY OF SAN DIEGO TURNS OUTWARD IN THE WORKPLACE

Shaina Gross, United Way of San Diego County's mobilization coordinator, knew instinctively that offering employees the opportunity to talk about their aspirations for their community could positively impact the workplace campaign. She worked with United Way's campaign director and staff to train resource development associates on how to facilitate aspirations conversations. At first, the resource development associates were reluctant. Through a number of training sessions where San Diego staff threw out random answers, resource development associates learned to acknowledge people's aspirations and connect the conversation back to education, income, and health.

The campaign rally outline starts off by asking "What are your aspirations for your community?" The campaign coordinator at the workplace is on hand to answer the question if no one else speaks up first. After the aspirations question, the conversation is connected back to education, income, and health. For example, someone said having bike paths was one of their aspirations for their community. The campaign associate then tied bike paths and an active community back to staying healthy and could link that authentically to United Way's health work. At another presentation, someone said their aspiration was for their neighborhood to be like La Jolla in San Diego, where they have good schools and everyone there has a good job. That was easily tied back to education and income.

The resource development associate then talks about United Way's role as a convener and tells a story that articulates how education, income, and health are all connected. And, of course, invites all employees to give.

For San Diego, this new way of doing campaign rallies means that United Way campaign staff no longer mention specific agencies or programs, which helps them better encourage their donors to support United Way's work in education, income, and health – as opposed to designating to agencies. At a 2011 campaign rally at Macy's, the resource development associate took this new approach. It was quickly clear that employees were engaged in the conversation. After this campaign talk, seven employees increased their pledge to give. While seven people may sound small, that was 35 percent of the people in the room!

Shaina says that one lesson learned is not to be afraid to try something new – but learning a new way to do something requires training and practice, so make sure to plan on that.

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LEARN MORE

To take the first step toward engaging and aligning your community around a cause, consider the following:

- With your United Way, take the *Turn Outward Quiz* and discuss the questions in the discussion guide as a group. Identify areas where you can begin to turn outward.
<http://online.unitedway.org/file.cfm?fid=3066495>
- Plan your first community conversation using the *Community Conversation Toolkit* available
 - Education conversation questions available at
<http://online.unitedway.org/file.cfm?fid=3069541>
 - Income conversation questions available at
<http://online.unitedway.org/file.cfm?fid=3113191>
 - Health conversation questions available at
<http://online.unitedway.org/file.cfm?fid=3113192>
- Learn more about what Mobilization Groups have done by listening to an archived webinar at <http://online.unitedway.org/file.cfm?fid=3105904> and by exploring examples at <http://online.unitedway.org/mobgroupsengage>
- Theme your first few community conversations using the advice from a webinar on *Identifying Themes and Implications from Community Conversations* at https://uww.adobeconnect.com/_a17179333/p1tmdrn7j7g/
- Explore other tools from *The Harwood Institute for Public Innovation* to help further your community engagement work at <http://online.unitedway.org/harwood>
- Visit Mobilization JumpStart to learn more at http://online.unitedway.org/mobilization_jumpstart/engage_align.cfm

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