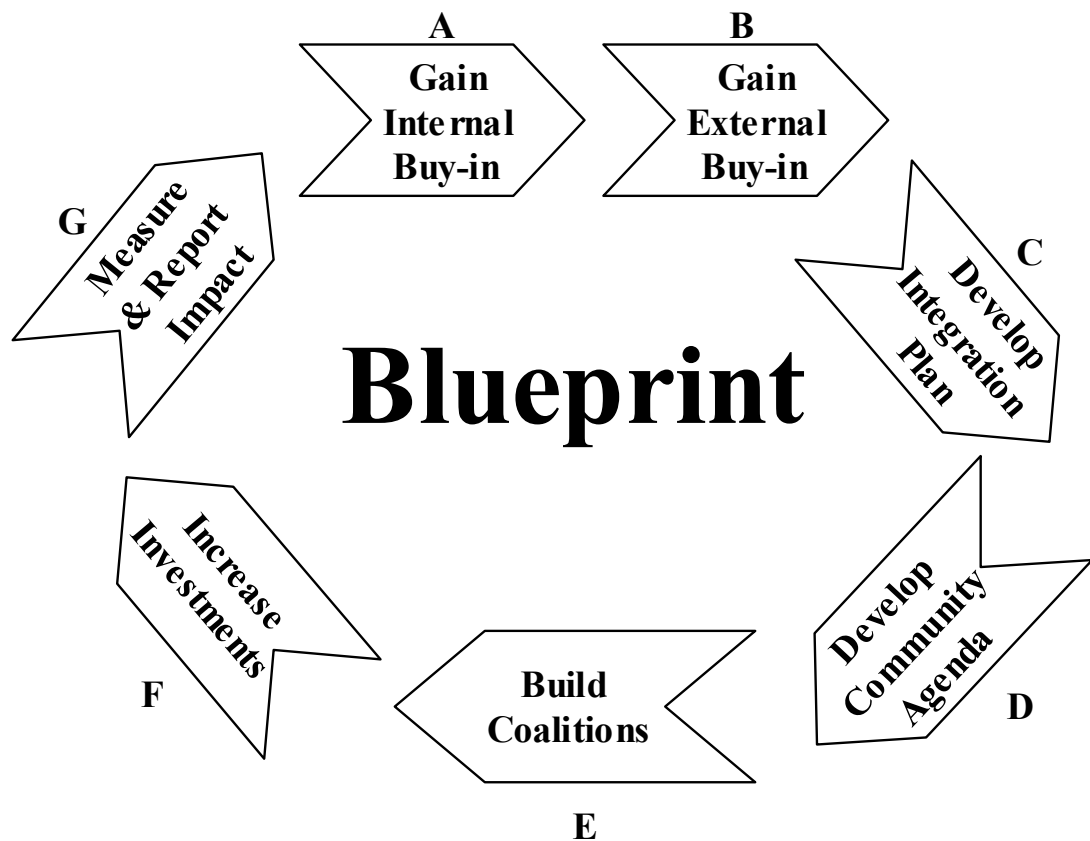


Leadership Strategies

One Blueprint For Local United Way Transformation



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Leadership Training • Strategic Planning • Meeting Facilitation • Change Management

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Version 0.7

“One Blueprint for Local United Way Transformation” is an on-going work developed by *Leadership Strategies – The Facilitation Company*. The document will continue to be updated with each new learning gained as we assist United Ways on the transformation journey. We will use version numbers to help readers know when a significant update has been made.

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I. Introduction

The United Way CEO of a community is smiling as the last board member departs following the quarterly meeting. At this meeting, the board adopted the United Way System vision as the vision for his United Way.

A. The United Way Vision and Aspirations

We will build a stronger America by mobilizing our communities to improve people's lives. To do this, we will:

- ❑ Energize and inspire people to make a difference
- ❑ Craft human care agendas within and across our communities
- ❑ Build coalitions around these agendas
- ❑ Increase investments in these agendas by expanding and diversifying our own development efforts and supporting those of others
- ❑ Ensure that these investments have measurable, recognizable impact
- ❑ Reflect the diversity of the communities we serve

The CEO knows that this is the beginning of a new type of work. In the past, his United Way has received accolades for raising funds and putting those funds to good use in the community. And while fund-raising will continue to play an important role in the United Way's activities, the new vision makes it clear that fund-raising is just one of six major components in the new work.

In the past, his United Way has successfully undertaken a number of community impact initiatives. His team has even created what might be called a community agenda. However, the new work means bringing leaders from all areas of the community together to define a common community agenda. The new work requires establishing specific outcome targets for the community and developing relationships based on achieving those targets. The new work requires working with partners and agencies differently, as resources are transferred from traditional programs and funneled into achieving the targets. The new work requires transforming the way his United Way operates so that the entire organization communicates, promotes and rewards community impact first.

B. Questions to Answer

Though this new work will require considerable change, the CEO is convinced now more than ever that this change is needed. But he has a lot of questions.

- ❑ How do I get started? What do I do first, second, third?

-
- ❑ How do I get my own Board up to speed and bought in? How do I make the best use of the Board to help further the transformation?
 - ❑ How do I get my staff and my entire operation understanding and embracing the new direction?
 - ❑ What is community impact? How do I measure it? How do I know if I am making a difference?
 - ❑ How do the activities of a United Way change? What must the Board, the CEO and the staff do differently?
 - ❑ How fast do I move with changes, especially changes to allocations?
 - ❑ How do I get agencies to accept funding changes without alienating them?
 - ❑ How do I get the community to see the United Way in the convener role?
 - ❑ How do I go about building a community agenda that is owned by the community and not just seen as the United Way agenda?
 - ❑ How do I build partnerships with those who have traditionally seen us as a competitor?
 - ❑ How do I build diversity thinking into everything we do?
 - ❑ How do I avoid the natural tendency to fall back into old patterns, old ways of doing things and old ways of measuring success?

United Ways across the country are finding themselves asking similar questions, “How do I get started?” Each United Way will need to develop its own unique roadmap for transformation. Leadership Strategies has developed this document, “One Blueprint for Local United Way Transformation,” to provide a starting point for a United Way to beginning mapping out its course.

The next section, “Overview of the Drivers Model for Change,” gives an overview of the steps we recommend in transforming a local United Way. The third section, “Steps in the Blueprint,” provides a more detailed blueprint for accomplishing the change.

We welcome your comments and insights.

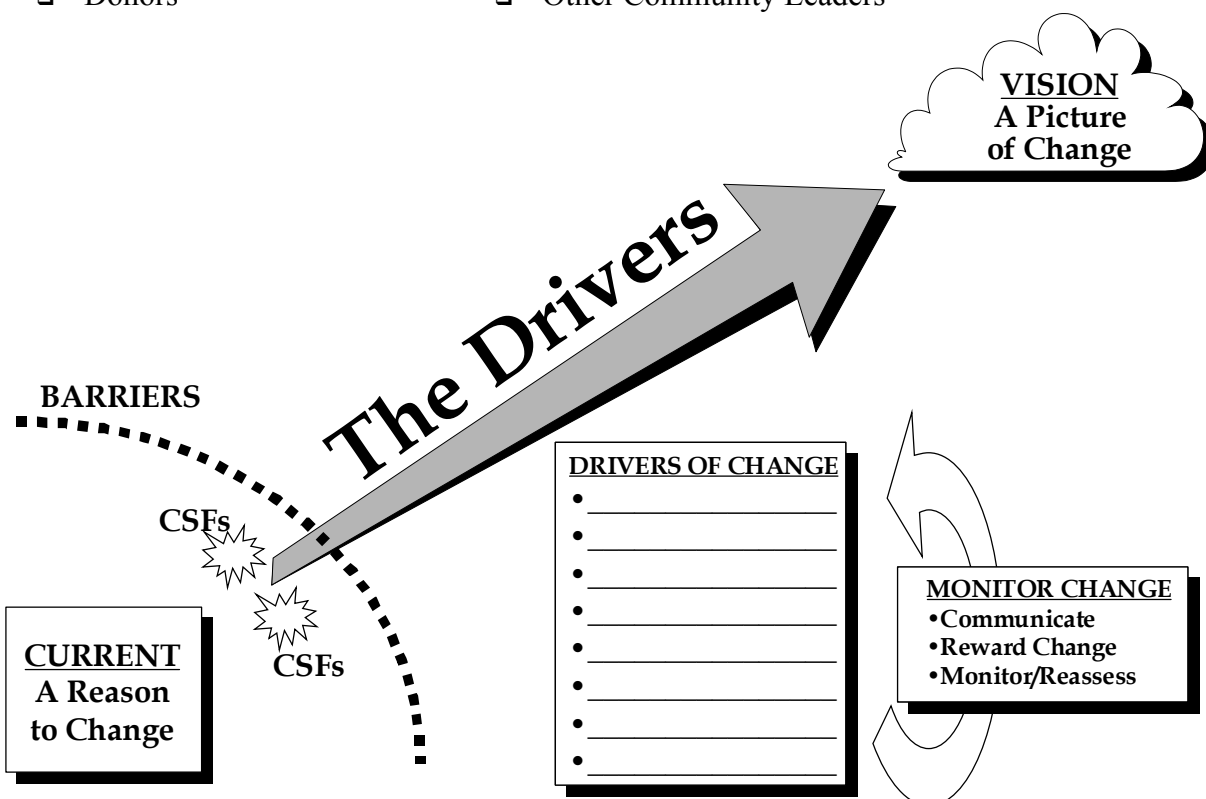
II. Overview of the Drivers Model for Change

The Drivers Model for Change is the Leadership Strategies method for taking a strategic approach to managing change. The model provides a simple communication tool for helping organizations construct a change strategy. The model is fully scalable and applies to non-profit organizations, Fortune 500 companies, a field office, an individual department, a work team, etc. There are four major steps in the Drivers Model for Change.

- A. Build Buy-in on the Need for Change
- B. Develop a Vision of Change
- C. Determine and Implement the Drivers of Change
- D. Monitor, Communicate and Reward Change

As you will see in Section III, “Steps in the Blueprint,” these four steps must be taken for each of the major groups of United Way stakeholders including:

- | | |
|---|--|
| <input type="checkbox"/> The Board | <input type="checkbox"/> Volunteers |
| <input type="checkbox"/> Senior Leadership Team | <input type="checkbox"/> Agencies |
| <input type="checkbox"/> Staff | <input type="checkbox"/> Partners |
| <input type="checkbox"/> Donors | <input type="checkbox"/> Other Community Leaders |



A. Build Buy-in on the Need for Change

“Who moved my cheese?”

For many people, change has very serious, negative connotations. For, by its nature, when change walks in the door, he is typically accompanied by his best friends, uncertainty, instability, doubt and confusion. And he is often seen in the company of discomfort, mistrust and pain. With such unsavory friends, who would invite change to any party? People generally extend the invitation only when they believe that the alternative – a party with out change – is much worse.

To convince others to undergo change requires clear and believable reasons that the alternative – not changing – is far worse then the pain of change. Therefore, an organization seeking to implement change must:

1. Develop a clear, compelling message that explains why change is necessary.
2. Take the steps to achieve buy-in from core opinion leaders.
3. Take the steps to achieve buy-in from a critical mass of the rest of the organization.

The Core Change Message

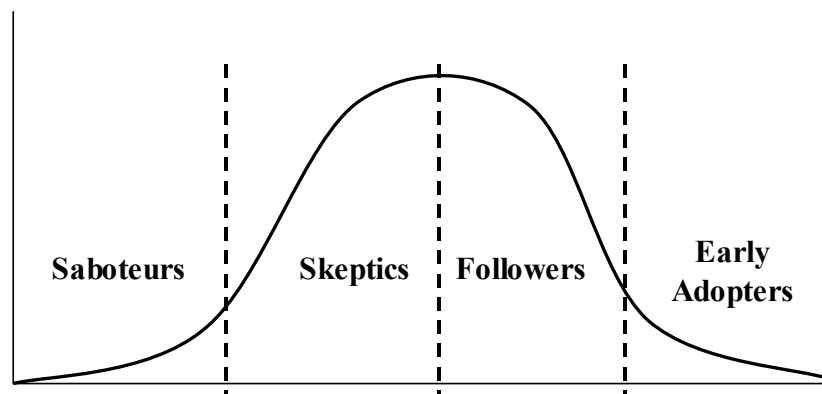
The “Reasons for Change” will be specific to your local United Way. It will also be important to tailor the message for each stakeholder group. However, there will likely be key core themes that cut across all audiences. What are the core themes? Consider the following as an outline:

1. The United Way has been losing share of the charitable dollar. (see the “Case for Change” – Report from the Task Force on Strengthening the United Way System).
 - While charitable dollars continue to increase, the United Way share of the charitable dollar has been in decline for many years.
 - Large workplace campaigns have been a primary vehicle for raising funds, but the percent of population accessible through large workplaces will continue to decrease with growth in telecommuting and small business.
 - Electronic campaign vehicles have emerged that are offering more efficient, less costly vehicles for allocating dollars, challenging the United Way position as an efficient vehicle for gathering community resources.
2. As the role of an efficient “middle man” becomes less valuable, we must redefine ourselves in a way that provides value as a community impact provider.
3. Yet, research shows that the United Way is generally perceived as a fund raiser/allocator, not a community builder or community change agent (see the “Case for Change” – Report from the Task Force on Strengthening the United Way System).
4. Therefore, to provide long-term, sustainable value to the community, we must change who we are and how we operate.

-
5. This change will require pulling coalitions together to define the areas of greatest need in our community.
 6. This change will require us to invest differently. We will most likely establish different relationships with our existing partners and develop new relationships with those best able to achieve the impact in the areas deemed most important to the community.
 7. This change will require us to measure impact and measure our success by the degree to which we positively impact the community in the areas of need.
 8. And, most importantly, this change will require us to be different. We will have to focus first and foremost on community impact and view fundraising as only one of several key components to achieving impact. We must change how we see our role, how we play our role and how we communicate our role to others.

Understanding Your Audience

Keep in mind that, when it comes to change, there are typically four types of people in an organization:



- ❑ **Early adopters.** They are convinced that the change is needed and are excited about the possibilities. In many cases, they knew change was needed long ago so welcome it now.
- ❑ **Followers.** They are willing to go along. They generally don't like the change, but are willing to give it a chance because they believe in the leader or the organization. Sometimes, they just want to keep their jobs.
- ❑ **Skeptics.** This group is pretty sure that change is not a good idea. However, they are willing to engage in discussion, listen to the arguments, and possibly test the waters. If they can be convinced that the change is necessary, they are typically willing to cautiously give it a chance.
- ❑ **Saboteurs.** This group is so sure that change is not a good idea that they do all that they can to prevent the change. They are typically not open to change and often start as "closet nay-sayers" – speaking out against the change behind closed doors. In more advanced

forms, saboteurs will drag their feet, get in the way, and sometimes behave deceptively to undermine the change efforts.

Your “Reasons for Change” should be targeted at the skeptical. This group is open to change, but just needs to be convinced that the change is necessary. If you can convert a significant percentage of this group, you have the critical mass needed for success.

With your “Reasons for Change” clearly articulated, it is typically helpful to gain buy-in first from each of your stakeholder groups, starting with one-on-one or group meetings with key opinion leaders.

B. Develop a Vision of Change

“Without vision, the people perish.”

While the “Reason for Change” provides the foundation for gaining buy-in to action, the “Vision of Change” provides a clear picture of the destination. The “Vision of Change” includes four components: the vision statement, mission, goals and objectives.

Vision and Mission

The Board of the United Way has already adopted a new **mission statement, vision statement,** and the **six aspirations** that define the vision for the United Way System. Your local United Way will likely want to review these components to determine if it is necessary to redefine your mission, vision and aspirations.

Goals

After reviewing/revising your mission and vision, the planning team will define **goals** for the organization. Goals are broad areas in which success is required in order to achieve the mission and vision. An organization typically has no fewer than three and no more than eight goals.

To determine your goals, the planning team might first utilize a visioning exercise to discover your goal categories. As an example, goal categories might include:

<input type="checkbox"/> Community Impact	<input type="checkbox"/> Leadership
<input type="checkbox"/> Resource Development	<input type="checkbox"/> Visibility
<input type="checkbox"/> Stakeholder Relationships	<input type="checkbox"/> Diversity
<input type="checkbox"/> Organization Effectiveness	<input type="checkbox"/> Work Environment

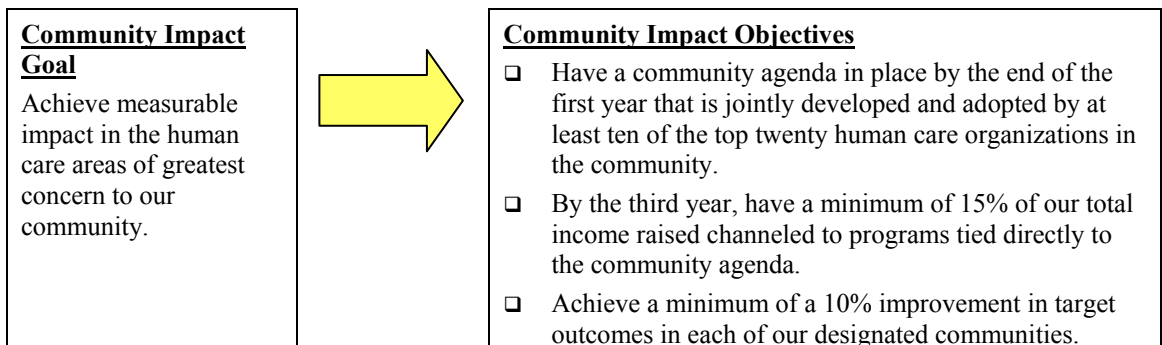
After defining the goal categories, the planning team will develop descriptions of each of the goals. A sample of a goal category and description follows:

Community Impact Goal

Achieve measurable impact in the human care areas of greatest concern to our community.

Objectives

After define goal categories in the descriptions, the planning team will the define **objectives** – specific, quantifiable, realistic targets that clearly establish the desired outcomes over the next three years – for each goal area.



Note that some objectives will be **outcome objectives**, such as the third objective above. Outcome objectives truly measure the results achieved in the goal area. Other objectives are **process objectives**, such as the first and second objective above. Process objectives don't directly measure the results of the goal. Instead, process objectives measure progress in the steps needed to achieve the goal.

While the objectives above might be suitable for the community impact goal, you will also have objectives for each of the other goals as well. The objectives establish the bar for the rest of the planning effort. All the strategies, action plans and investments will be focused on achieving one or more of the objectives. Therefore, it is critical that you select the right objectives for measuring your success. As you might imagine, establishing objectives is perhaps the toughest work in planning!

Guiding Principles

As part of the Vision of Change, you will also establish **Guiding Principles**. Guiding Principles are general guidelines that set the foundation for how the organization will operate. Guiding principles are more than just a statement of values. Guiding principles also describe the actions the organization will take based on the values. To ensure that your guiding principles are truly operational, we recommend the format, "We believe... Therefore we will..."

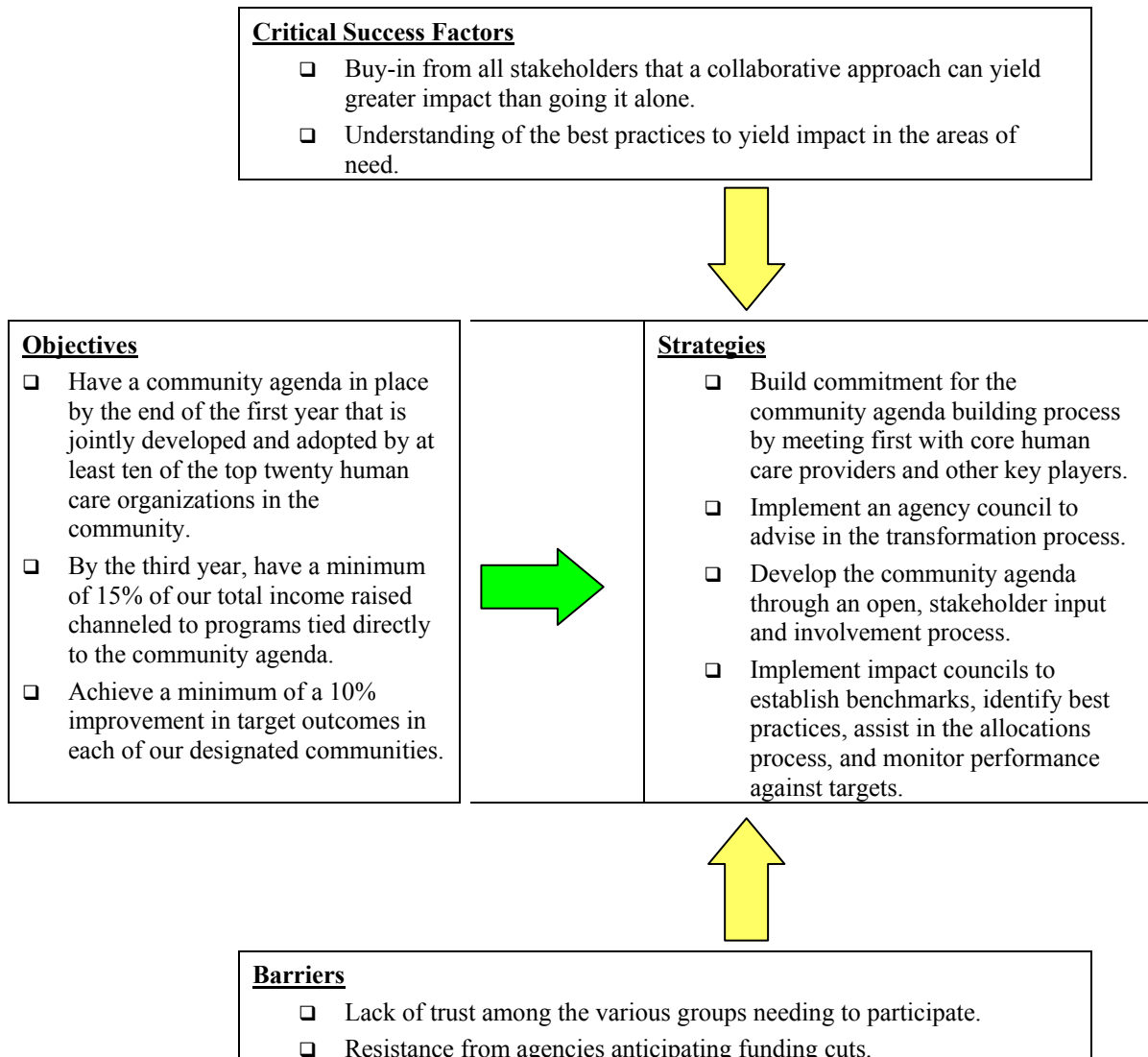
Sample Guiding Principle

We believe collaboration provides opportunities for delivering greater value to the community. Therefore we will actively seek out partnership opportunities with others with complementary skills, resources and values.

C. Determine and Implement the Drivers of Change

Once the strategic direction is established, the next step is to develop the road map for achieving the direction. For the road map to be viable, however, it must focus on three areas in particular.

- The **critical success factors** identify those key conditions that must be met to achieve the objectives. Critical success factors, typically no fewer than two and no more than seven per goal, serve as a guide for determining the strategies to be developed.
- The **barriers** to achieving the objectives indicate those challenges that the organization must overcome to achieve its strategic direction. Barriers answer the following questions: “Why haven’t we achieved our goals already? What is standing in our way?”
- The **strategies** that are undertaken (i.e., the road map) must drive achievement of the strategic direction by controlling the critical success factors and overcoming the barriers.



The strategies must be **prioritized** to determine the items to focus on first. For each priority strategy, an **action plan** is developed which details deliverables, steps, responsibilities, costs and timetables. The action plans can then be summarized to identify resource requirements and to develop a resource plan to meet those requirements.

Sample Resource Requirements

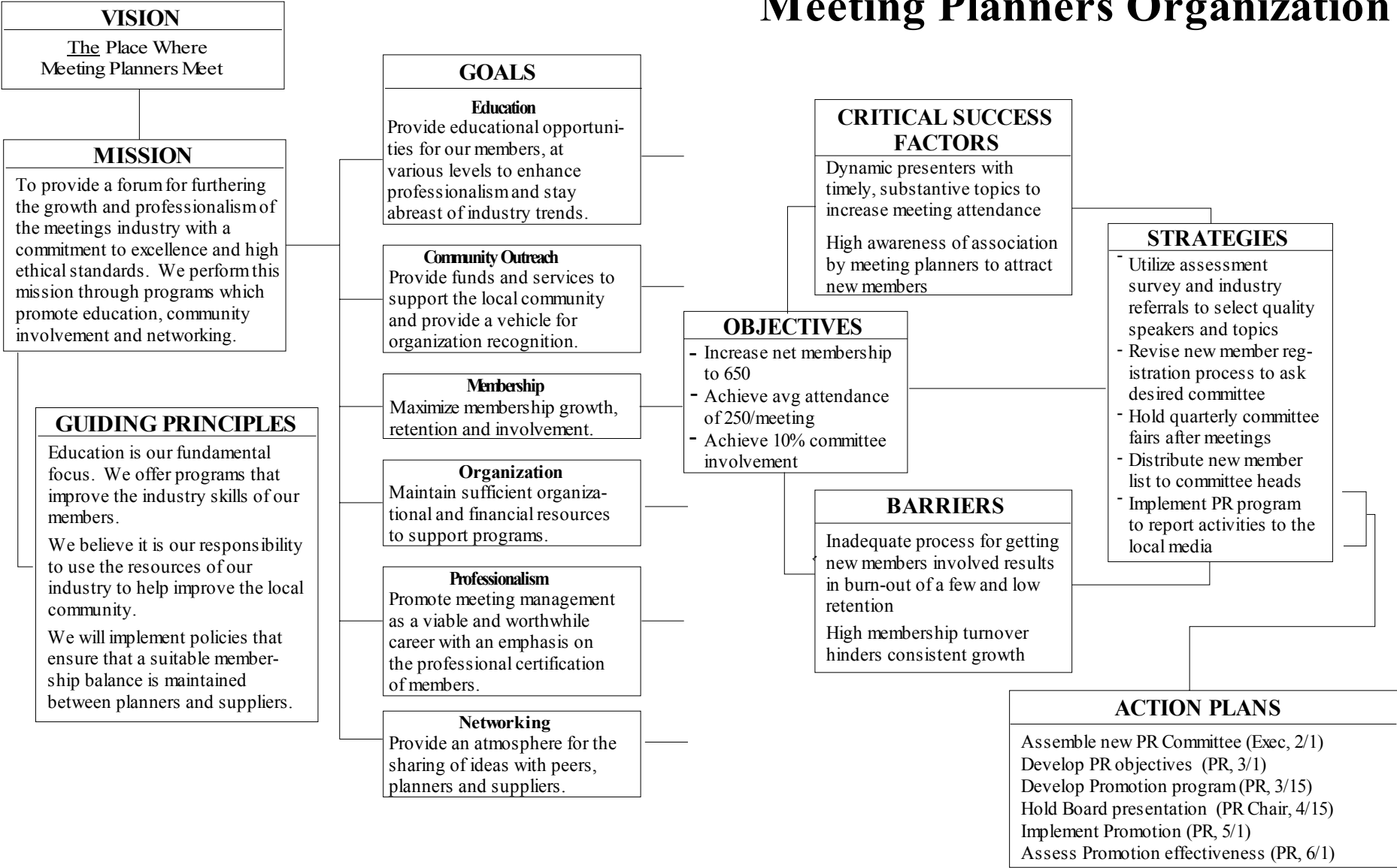
Prioritized Initiatives	Year 1				Year 2				Year 3			
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
1.	\$	\$	\$	\$	\$	\$	\$	\$	\$	\$	\$	\$
2.	\$	\$	\$	\$	\$	\$	\$	\$	\$	\$	\$	\$
3.	\$	\$	\$	\$	\$	\$	\$	\$	\$	\$	\$	\$
4.	\$	\$	\$	\$	\$	\$	\$	\$	\$	\$	\$	\$
5.	\$	\$	\$	\$	\$	\$	\$	\$	\$	\$	\$	\$
6.	\$	\$	\$	\$	\$	\$	\$	\$	\$	\$	\$	\$
7.	\$	\$	\$	\$	\$	\$	\$	\$	\$	\$	\$	\$
8.	\$	\$	\$	\$	\$	\$	\$	\$	\$	\$	\$	\$
Totals	\$	\$	\$	\$	\$	\$	\$	\$	\$	\$	\$	\$

D. Monitor, Communicate and Reward Change

“In the absence of information, people assume the worse.”

Many organizations benefit simply from going through the process of creating a strategy. At this point, everyone is clear on where we are going and how we plan to get there. However, the key value to strategy development comes in the implementation of the plan. Unfortunately, all too often, strategic plans become space fillers on an executive’s bookshelf. To prevent this occurrence, we recommend a structured monitoring process every three-to-six months. The structured review involves assessing progress on strategies and grading the current and projected performance against the quantified objectives. While often a sobering process, this detailed level of monitoring provides a method for ensuring that the long-term strategy stays on the front burners, despite the pressures of the day-to-day business operation.

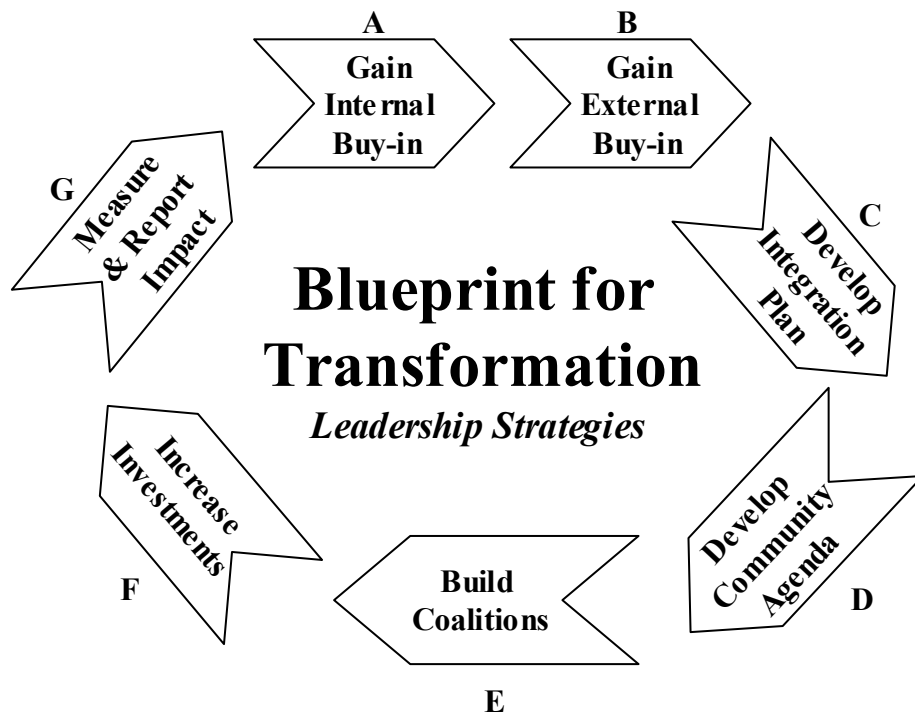
Meeting Planners Organization



III. Steps in the Blueprint

The steps below are intended to provide a guide for the types of activities necessary to bring about transformation at the local level. The blueprint is based on several key principles:

- ❑ **Principle 1:** Be very clear yourself on the reasons for change and, at a broad level, your vision of change.
- ❑ **Principle 2:** Before proceeding with action involving a particular group (e.g., Board, staff, agencies), communicate with and gain buy-in from core opinion leaders first before going to the entire group.
- ❑ **Principle 3:** To help maximize buy-in, create only a few components of the overall vision or approach, engage the group in developing the full picture.
- ❑ **Principle 4:** Be sure to communicate the behaviors needed as well as the reward systems for implementing change.



A. Gain Internal Buy-in and Commitment.

1. Document your views for why change is necessary (“The Reasons for Change”) and the benefits of change.
 - ❑ Highlight the major changes you believe the organization must undertake in order to achieve this change.
 - ❑ Consider distributing your draft of the “Reasons for Change” in advance to your staff leadership team.
 - ❑ Select a member of your staff leadership team to serve as the Change Leader. This person should be the one who will most enthusiastically support the change and have the influence to guide the change. The Change Leader is responsible for overseeing the execution of the change plan, reporting progress, and recommending adjustments.
 - ❑ Meet with your Change Leader in advance to discuss the change and the role you expect the Change Leader to play.
 - ❑ Note: It is typically inappropriate for the CEO of an organization to serve as the Change Leader. Most CEOs are involved in so many aspects of the organization that the change can easily take a lower priority unless someone is responsible for keeping the change moving. In addition, should the change effort stall due to lack of attention, a CEO who is also serving as Change Leader would be less likely to chastise the Change Leader!

2. Meet with your staff leadership to gain buy-in and commitment.
 - ❑ Review the “Reasons for Change” and the Community Impact Aspirations from the United Way System Vision.
 - ❑ Provide staff leaders the opportunity to discuss strengths and weaknesses of making a change and the barriers the change will likely face.
 - ❑ Ask staff leaders to enhance the document by adding other reasons change is needed, other changes that would be necessary, and other benefits of change
 - ❑ Most importantly, ask staff leaders to identify ways to make the change more acceptable to the staff.
 - ❑ Get a preliminary sense of their commitment to change.
 - Ask staff leaders to honestly indicate their views on the importance of implementing this change.
 - At the completion of the discussion, consider asking staff leaders to rate on a 1-to-5 scale (5=very high) to indicate their beliefs about the importance of implementing this change.
 - ❑ Develop a short-term action plan of the major steps needed to gain buy-in to embark on the direction.

-
- Board buy-in process
 - Staff buy-in process
 - Organization plan development
 - Management plan development
3. Meet with the Board to gain buy-in and commitment.
- Prepare Board presentation on “the Reasons for Change.”
 - Meet with Board chair and Board opinion leaders to review “Reasons for Change,” the Community Impact Aspirations and short-term action plan.
 - Meet with full Board to review “Reasons for Change,” the Community Impact Aspirations and short-term action plan.
 - Get a preliminary sense of their commitment to change.
 - Ask Board Members to honestly indicate their views on the importance of implementing this change.
 - At the completion of the discussion, consider asking Board Members to rate on a 1-to-5 scale (5=very high) to indicate their beliefs about the importance of implementing this change.
 - Work with the full Board or the Executive Committee to confirm or revise the local vision and mission statements as needed to align with the System’s mission and vision statements
 - Describe the process that will be used to plan and implement the change.
4. Meet with staff opinion leaders to gain buy-in and commitment.
- Provide staff opinion leaders an opportunity to discuss strengths, weaknesses of making a change and the barriers the change will likely face.
 - Most importantly, ask them to identify ways to make the change more acceptable to their peers.
 - Describe the process that will be used to plan and implement the change.
 - Get a preliminary sense of their commitment to change.
 - Ask staff opinion leaders to honestly indicate their views on the importance of implementing this change.
 - At the completion of the discussion, consider asking staff opinion leaders to rate on a 1-to-5 scale (5=very high) to indicate their beliefs about the importance of implementing this change.
5. Meet with the entire staff to gain buy-in and commitment.
- Review the “Reasons for Change,” the Community Impact Aspirations and the short-term action plan.

-
- ❑ Have the staff identify critical success factors and barriers to change and potential strategies to consider.
 - ❑ Describe the process that will be used to plan and implement the change.
 - ❑ Discuss the process for development of the organization and management plans.
 - ❑ Get a preliminary sense of their commitment to change.
 - Consider asking the staff to rate on a 1-to-5 scale (5=very high) to indicate their beliefs about the importance of implementing this change.

B. Gain External Buy-in and Commitment.

It is essential that steps to gain external buy-in begin immediately after initial meetings with the Board. While it may appear more appropriate to wait until the entire plan is developed, time will likely work against you. Once change is agreed to at the Board level, it is likely that other significant stakeholders will begin hearing the “rumbling” of impending change. And, in the absence of information, stakeholders will likely assume the worse. This can lead to rumor, miscommunication, conflict, and often acts of desperation. Therefore it is typically best to begin the external engagement process immediately after gaining Board buy-in to the new direction.

1. Meet with key agencies and agency opinion leaders to gain buy-in and commitment. (These might be individual meetings or a meeting in small groups.)
 - ❑ Review the “Reasons for Change” and the Community Impact Aspirations from the United Way System Vision.
 - ❑ Provide agency leaders an opportunity to discuss strengths of making a change and the barriers the United Way will likely face.
 - ❑ Most importantly, ask them to identify ways to make the change more acceptable to their peers.
 - ❑ Describe the process that will be used to plan and implement the change.
 - ❑ Get a preliminary sense of their commitment to change on a 1-to-5 scale.
2. Convene a meeting of all funded agencies to notify them of the new direction.
 - ❑ Review the “Reasons for Change” and the Community Impact Aspirations from the United Way System Vision.
 - ❑ Provide agency leaders an opportunity to discuss strengths of making a change and the barriers the United Way will likely face.
 - ❑ Most importantly, ask them to identify ways to make the change more acceptable.
 - ❑ Describe the process that will be used to plan and implement the change.
 - ❑ Get a preliminary sense of their commitment to change on a 1-to-5 scale.

-
3. Meet with key donors, volunteers and other stakeholders to gain buy-in and commitment. (These might be individual meetings or a meeting in small groups.)
 - ❑ Review the “Reasons for Change” and the Community Impact Aspirations from the United Way System Vision.
 - ❑ Provide donors and volunteers an opportunity to discuss strengths of making a change and the barriers the United Way will likely face.
 - ❑ Ask them to suggest specific strategies that they believe will help overcome the barriers.
 - ❑ Describe the process that will be used to plan and implement the change.
 - ❑ Get a preliminary sense of their commitment to change on a 1-to-5 scale.
 4. Develop and distribute to all donors, volunteers and other stakeholders a document describing the upcoming change and the process that will be used to plan and implement the change.

C. Develop Plans for Organization, Management and Integration.

1. Develop the organization plan.
 - ❑ Select participants in the organization planning process to include the staff leadership team and other key staff members who can contribute significantly to the planning process.
 - ❑ Consider a survey of all stakeholders in advance to seek their input on strategies to consider to bring about the changes embodied in “Reasons for Change” and the aspirations that make up the vision.
 - ❑ Answer: Where are we today?
 - Review the United Way System direction
 - Review performance, budget trends, revenue trends
 - Review the current community impact initiatives and levels of success
 - ❑ Answer: Where do we want to be?
 - Define/refine the local mission and vision in light of the community impact direction.
 - Develop goals (broad aims that define success in the mission and vision); consider incorporating the aspirations of the United Way System as goals.
 - Develop objectives (outcome measures for each of the goal areas).
 - Develop “From/To” statements that describe the vision in terms of what the organization is moving from and what the organization is moving to.
 - ❑ Answer: How do we get there?
 - Determine critical success factors and barriers to achieving the objectives for each goal area.

-
- Develop strategies for each set of objectives.
 - Prioritize the strategies to determine what to start on first.
 - Define roles in the priority strategies based on the existing organization structure.
 - Answer: How will we monitor progress?
 - Define the communications strategy for how to engage other stakeholders in the change effort.
 - Define the process for monitoring progress.
 - Define the process for developing the management plan that will review the organization structure and roles.
 - Hold a briefing session for the entire staff
 - Review the draft plan and gain additional input
 - Enlist volunteers or assign staff members to teams to develop the detailed action plans.
 - Develop action plans for the priority strategies.
 - Review action plans for approval by the staff leadership team.
2. Develop the management plan.
- Review the organization structure and determine changes needed based on the new direction and priorities.
 - Define roles and responsibilities.
 - Determine the approach and format that will be used for department planning.
3. Develop the individual department plans.
- Define performance outcomes in line with the new direction and objectives.
 - Define departmental strategies in line with the new direction and priority strategies.
 - Recommend activities that will no longer be undertaken in order to shift resources to priorities.
 - Recommend methods for tracking, communication and rewarding performance.
 - Define the financial and human resources needed to accomplish the department plan.
 - Define additional skills needed to accomplish the department plan.
 - Define changes to processes needed to accomplish the department plan.
 - Review the individual departments plans for approval by the staff leadership team.
4. Develop the change management plan.
- Determine monitoring and evaluation strategies.
 - Determine skill development strategies.

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- Determine performance management strategies.
 - Determine reward and recognition strategies.
 - Determine communication strategies.
5. Develop the integration plan.
- Develop a SPAN chart (Supervise-Participate-Approve-Notify) indicating the level of involvement of the various organization units in the key processes.
 - Determine additional changes (if any) needed to the organization structure.
 - Develop the resource plan.
 - Develop the budget, including annual funding targets for community impact work.
 - Determine the implementation timetable, including the timing of changes to allocations.
 - Present a high-level version of the plan to the Board.
6. Meet with staff to review the entire plan and implementation timetable.
- Organization plan
 - Management plan
 - Integration plan
 - Change management plan
 - Implementation time table
7. Finalize the process for developing the community agenda.
8. Seek assistance from organizations to help fund the development of the community agenda.

D. Develop the Community Agenda.

1. Convene an Initiating Committee to select the members for the Community Agenda Task Force.
 - Select Initiating Committee members based on recommendations from agencies, volunteers and other stakeholders.
 - Provide the Initiating Committee with a clear purpose, defined resources, and time constraints.
 - Develop criteria and select members for the Community Agenda Task Force.
2. Develop the information base to be used by the Task Force.
 - Compile existing data on the needs of the community across a variety of arenas.

-
- Consider using surveys of multiple constituencies, including:
 - Community and Government Leaders
 - Health and Human Services agencies and providers
 - Citizens
 - Consider using newspapers, the web and other vehicles for gaining information from common citizens on the key need areas in the community.
3. Define the need areas that will make up the Community Agenda.
- Develop criteria for inclusion in the Community Agenda.
 - Identify potential need areas from existing data and survey information.
 - Use the criteria to narrow the potential need areas to a finalist list identified for further study.
 - Gather additional research as required on the need areas making the finalist list.
 - Based on the additional research, use the criteria to narrow the finalist list to the selected need areas that will make up the community agenda.

E. Build Coalitions around the Community Agenda.

1. Reconvene the Initiating Committee to develop a plan for creating Vision Councils for each of the need areas and an Executive Council to whom the Vision Councils will be accountable.
 - Invite desired candidates to serve as Executive Council members.
 - Publicize the Community Agenda, the role of Vision Councils, the selection process and desired traits of Vision Council members; invite nominations to the Vision Councils.
 - Select Vision Council members.
2. Support the Vision Councils in their work.
 - Use team building activities to help the members of the Vision Council understand each other's perspectives, communication styles and problem solving approaches to accelerate the team formation process.
 - Define the community's current condition in the need area.
 - Develop a comprehensive list of existing community initiatives that address the need area.
 - Define the specific community outcomes and indicators, with timeframes, for the need area.
 - Identify best practices from across the nation in addressing the need area.

-
- ❑ Outline targeted strategies that the community should seek to fund to achieve maximum impact in the need area.
 - ❑ Develop and distribute RFPs to solicit proposals to implement the targeted strategies.
 - Encourage collaboration, innovation, creativity, accountability and measurement.
 - ❑ Evaluate proposals and select proposals to fund by rating proposals against pre-determined criteria.
 - ❑ Monitor the implementation of the strategies.
 - ❑ Review reports on results from funded proposals.
 - ❑ Seek feedback on the effectiveness of strategies from grantees and other stakeholders.
 - ❑ Develop recommendations for altering strategies based on feedback.
3. Evaluate the Vision Councils. (executed by the Executive Council)
- ❑ Review the progress of the Vision Councils.
 - ❑ Ensure consistency in the approach.
 - ❑ Resolve issues as needed.

F. Increase Investments in the Community Agenda.

1. Modify the United Way fundraising approaches and communications to focus on the Community Agenda.
2. Seek partnerships with others to attract investments in the Community Agenda.
3. Seek to leverage investments in the Community Agenda through foundations, government, and corporate matching strategies.
4. Provide training to others in attracting and leveraging funding.

G. Measure Impact and Report Results.

1. Prepare and distribute impact reports to the community.
 - ❑ Activities performed
 - ❑ Results achieved
 - ❑ Progress to-date on the indicators
2. Gather feedback from the community to adjust the Community Agenda as needed.

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We hope you have found the Blueprint helpful as you begin developing your own transformation journey. We welcome your comments and insights.

<p>Why Leadership Strategies – The Facilitation Company?</p>	<p>We understand the new direction.</p> <p>We are honored to have been selected to facilitate meetings of the Task Force on Strengthening the United Way System in developing the blue print for the new direction. We continue to be utilized in working with the Board, the NPC, and Leadership Conferences.</p> <p>We are experienced with local United Ways focusing on community impact.</p> <p>We have worked with United Ways in Atlanta, Columbus and New York as they have implemented community impact strategies. From facilitating Boards in direction setting, to providing training to staff; From developing a community agenda, to working with vision councils and transforming the allocations process.</p> <p>We are a national leader in providing facilitation services.</p> <p>Leadership Strategies provides professional facilitators to assist corporations, governments and non-profit organizations through a variety of processes including strategic planning, issue resolution, process improvement, requirements analysis, focus groups and conference sessions. Our facilitators are trained in the Facilitator’s Methodologytm – our documented approach to facilitation which includes ten fundamental principles and over 90 specific techniques to provide consistent, high quality facilitation. Each year, we train hundreds of people around the nation, and around the world in our methodology through our highly-acclaimed course, <i>The Effective Facilitator</i>.</p> <p>We have strong relationships in the facilitation community.</p> <p>Leadership Strategies speakers are widely sought to speak at conferences of our peers. Presentations have been made before the Midwest Facilitator Network, the Southwest Facilitator Network, the Mid-Atlantic Facilitation Group, the Southeast Facilitator Forum and the Australia-Asia Facilitation Conference. Leadership Strategies has strong ties with the International Association of Facilitators, the industry trade association. We typically are asked to provide multiple presenters at the annual international conference. We have also served on IAF committees, including the North America Certification Board.</p>
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How to get started?

We recommend starting with a half-day management briefing.

- ❑ The purpose of the half-day session is to get your entire staff leadership team on the same page concerning transformation.
- ❑ The briefing helps your team identify why transformation may be necessary in your United Way and the specific issues that transformation is intended to address for you.
- ❑ We review our Blueprint for transformation and guide the team in using the Blueprint as a starting point in creating a customized process that addresses the specific issues your team identified earlier. We can also identify potential areas in which we can be of service to you.
- ❑ As a result of the briefing, each member of your leadership team will understand why transformation is needed and will have participated in developing a process for undertaking the change.
- ❑ Following the briefing, your team will be able to finalize your transformation road map and take the steps to gain Board commitment to action.

Leadership Strategies

The Facilitation Company

Professional Facilitation

Meeting Facilitation

Strategic Planning

Systems Analysis

Issue Resolution

Team Building

Conference Facilitation

Process Improvement

Leadership Training

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Making Meetings Work!
Effective Teams Work!

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Project Planning

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