

Global Results Framework

Power of Network Data

Annual Pennsylvania Statewide Conference
Thursday, June 21 2018

Session Goals

- Global Results Framework Overview
- Learn how the GRF benefits your United Way
- Highlights from last year's reporting & communicating results
- Answer common reporting questions

Speaker

Hannah Beesley, Manager, Impact and Measurement, UWW

Introductions

- What is your name?
- Which United Way are you with?
- What is your role?
- Are you familiar with the Global Results Framework (GRF)?
- Did your United Way report GRF data last year?

What is the Global Results Framework?

A common, limited set of indicators that United Ways report on to demonstrate our shared impact within and across communities.

Capturing Results for Donors

AS PART OF BOLD PLAY 1, develop a practical framework to aggregate results across United Way communities and markets to demonstrate our **VALUE** proposition.



Shared Return on Investment

demonstrate how shared investments are contributing to change in communities



Simplify and Align Results

key data points to show meaningful progress on shared impact goals



Convey Scale

shared results across markets (e.g. globally, regionally, corporate footprint)



Create a Compelling Narrative

for donors, about our work within and across markets



Mobilize Resources

Financial Resources
Volunteers
Community Engagement

Build Stronger Communities

Direct services and supports
(services and supports to individuals and families)

Systems Improvement
(Increased community capacity via training, policy change, convening, partnerships, resource development)

Change Lives

Improved Childhood Success
School readiness
Reading proficiency

Improved Youth Success
Complete secondary school
Attain employment

Improved Economic Mobility
Achieve financial stability
Attain jobs

Improved Access to Health
Healthy Beginnings
Healthy Lives

Why aggregate common results across United Ways?

Respond to Donors' Demands

- 60,000+ companies who partner with us are increasingly global, and they're demanding consistent results across key markets.
- United Way is the world's biggest nonprofit we have the ability to deliver change at scale, across geographies.
- The GRF is a clear and compelling way to show our impact across communities.

Demonstrate Our Value Proposition

- Demonstrate unique ability to deliver change a scale, using common metrics
- Show how we deliver results in a way that differentiates us
- Gauge our networks' collective contribution on indicators that matter most in education, income, and health



Impact Area Indicators

Bring community residents together on issues of shared importance

of convenings

of community residents participating in convenings

NEW for 2018 (open-ended fields):

- **Residents Engaged** - Please share the demographic breakdown of community residents that participated in your convenings included above. To what extent does this reflect the overall demographic makeup and diversity of your community?
- **Public Accountability** - Has your United Way incorporated clear language affirming a commitment to and respect for diversity, equity, and inclusiveness into your principles, values, vision statement, by-laws, strategic plan, and impact goals? How has your United Way taken a public stance to address and play a leadership role in alleviating racial, gender, ethnic, or other disparities in your community?
- **Outcomes/Results** - Share one RESULT explicitly connected to your United Way and/or community partners efforts' to engage community and implement strategies and direct resources to alleviate existing race, ethnic, gender or other disparities between groups of community residents.





GOAL
Children enter school ready and are successful in primary school



MOBILIZE RESOURCES
Total # of volunteers
Total \$ amount of resources invested

STRENGTHEN COMMUNITIES

Direct Supports and Services

- # of children served (0-5) enrolled in high-quality early childhood programs
- # of children served receiving literacy supports in grades K-3
- # of families, caregivers served that are provided with information, resources, tools, trainings and/or teaching skills

Systems Improvement

- # of policies promoted, enacted or modified to promote childhood success
- # of community partners organized, led, and/or managed by United Way
- # of early childhood staff trained to provide quality programs, services

CHANGE LIVES

Outcomes

- % of children (0-5) served who achieve developmental milestones
- % of children served who are **proficient on school readiness assessments by the end of their kindergarten year**
- % of children (K-3) served reading at grade level
- % of children (K-3) served who maintain satisfactory or improve school attendance



GOAL

Youth gain the knowledge, skills, and credentials to obtain family- sustaining employment



MOBILIZE RESOURCES

Total # of volunteers
Total \$ amount of resources invested

STRENGTHEN COMMUNITIES

Direct Supports and Services

of elementary/middle/high school youth served who participate in school and/or community-based out-of-school time programs and/or receive individualized supports
of youth served who receive job skills training

Systems Improvement

of policies promoted, enacted or modified to promote youth success
of community partners organized, led, and/or managed by United Way
of youth development staff trained to provide quality programs, services

CHANGE LIVES

Outcomes

% of youth served who graduate high school on time
% of youth served who gain post-secondary employment, further education or credentials
of youth served (15-24) who gain employment
% of middle/high school youth served who earn passing grades in core subject areas
% of elementary/middle/high school youth served who maintain satisfactory or improve school attendance
% of middle/high school youth served who develop soft skills
% of youth served who transition from middle to high school on time



Indicators – Economic Mobility



GOAL
Individuals/families
improve their
socioeconomic status



**MOBILIZE
RESOURCES**
Total # of volunteers
Total \$ amount of
resources invested

STRENGTHEN COMMUNITIES

Direct Supports and Services

individuals served who receive job skills training

of individuals served who access affordable housing, financial products, and services

Systems Improvement

of policies promoted, enacted, or modified to promote economic mobility

of community partners organized, led, and/or managed by United Way

of financial sector staff trained to deliver quality services

CHANGE LIVES

Outcomes

% of individuals served who gain employment

of vets served who gain employment

% of individuals served who increase their wages

% of individuals served who increase disposable income by
accessing benefits and/or reducing costs

% of individuals served who earn job-relevant licenses, certificates, and/or credentials

Total dollar amount of refunds returned to individuals/families through VITA and

MyFreeTaxes



GOAL
Individuals/families
have access to
healthcare and
improve their health



**MOBILIZE
RESOURCES**
Total # of volunteers
Total \$ amount of
resources invested

STRENGTHEN COMMUNITIES

Direct Supports and Services

- # of individuals served participating in physical activity and/or healthy food access/nutrition programs
- # of individuals served with access to healthcare services **and supports**
- # of individuals served with access to healthcare insurance

Systems Improvement

- # of policies promoted, enacted or modified to promote health
- # of community partners organized, led, and/or managed by United Way
- # of health sector staff trained to deliver quality services

CHANGE LIVES

Outcomes

- % of children/adults served who **eat healthier, increase their physical activity, and/or move towards a healthy weight**
- % of babies served who **experience healthy birth outcomes (e.g. celebrate their 1st birthday, carried to full term, and/or born at a healthy weight)**
- % of youth/adults served who **avoid or reduce risk-taking behaviors**
- % of mothers served who **access prenatal care**

Changes to Qualitative Fields

- Each impact area (i.e. childhood success, youth success, economic mobility, access to health) has open-ended fields for United Ways to include narrative text that describes/contextualizes the impact data being reported
- Changes for 2018
 - Lessons Learned will be deleted
 - Description, Core Services/Supports, Target Beneficiaries and Success Stories fields will remain
 - Two new fields to be added: **Key Policy Wins** and **Best Work**

P CS Impact Area Qualitative Description (Start Here)

? Description

? Core Services/Supports

? Target Beneficiaries

? Success Stories

? Lessons Learned

Value Proposition for the Network

What's in it for local United Ways?

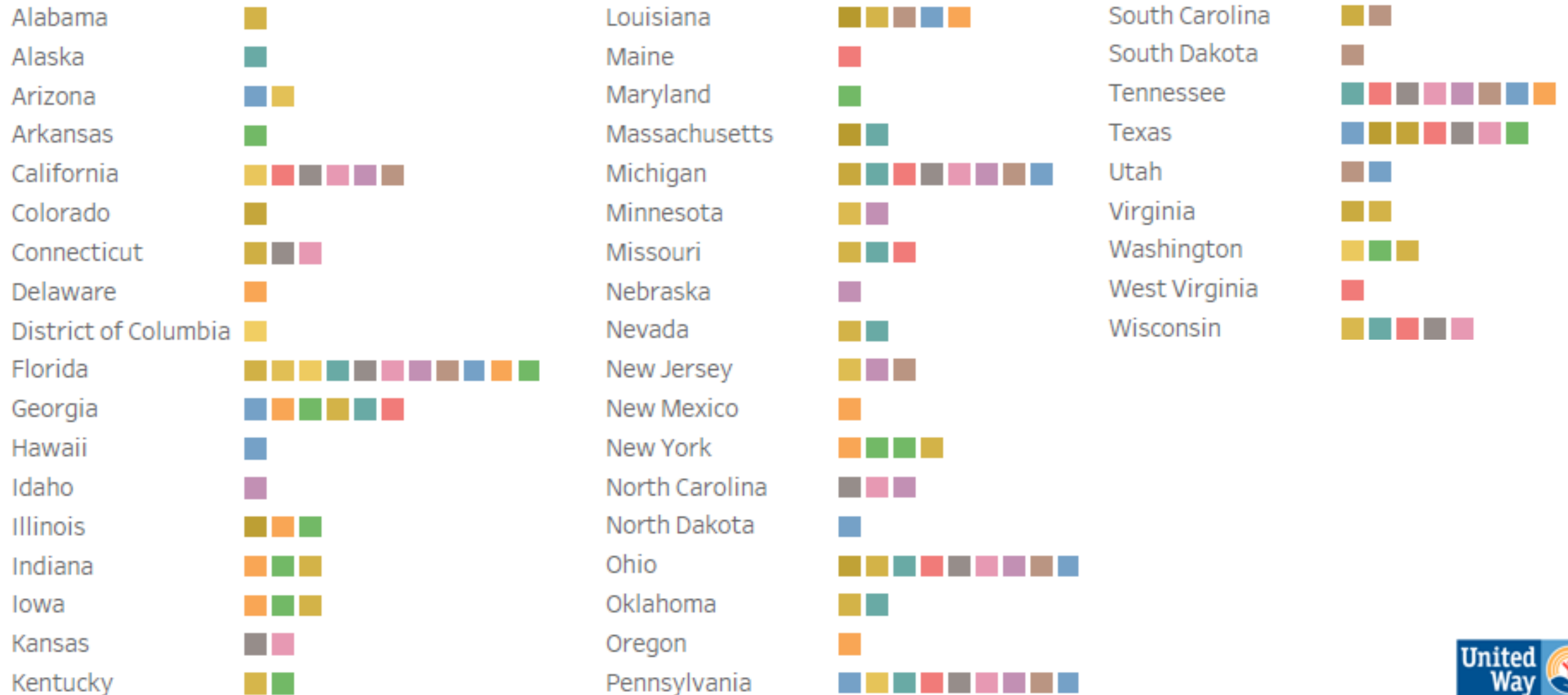
- Share **local impact results** with corporate partners and individual donors via **customizable infographics**.
- Show alignment between your local impact strategies and the GRF; **connect local impact to common results** across markets
- **Inform others** about your work
- Share data with other United Ways (via **Partner Connect**)
- Realize **potential cost savings**
- Contribute to **positioning the UW network** as the global philanthropic partner of choice

2017 Reporting Highlights & Snapshots

United Way Participation - 2017

- 154 United Ways in 5 regions reported GRF data
- Represented 83% of annual campaign revenue; 147,474,530 people in major metropolitan areas (U.S.)
- Top 5 reported indicators were in childhood and youth success (early childhood enrollment, partnerships, OST programs, family engagement)
- Least reported indicators were in health (birthweight, children/adults weight, access to prenatal care, healthcare staff training)

Reporting Participation by State



GLOBAL RESULTS FRAMEWORK

Impact at a Glance



Childhood Success

\$221,159,409 INVESTED

389,891

children enrolled in high-quality childhood programs

77%

of children reading at grade level

387,289

children received literacy support

77%

of children achieved developmental milestones



Youth Success

\$192,851,891 INVESTED

89%

of youth graduated high school on time

2,007,962

youth participated in school and/or community programs

80%

of youth developed soft skills such as communication and time management



Economic Mobility

\$196,055,322 INVESTED

1,014,944

individuals accessed affordable housing, financial products, and services

687,982

individuals received job skills training

48%

of individuals gained employment



Access to Health

\$194,154,722 INVESTED

3,105,010

individuals participated in physical activity, healthy food access, and/or nutrition programs

85%

of children/adults adopted healthy behaviors

1,725,983

of individuals had access to healthcare services (mental, physical)



CHILDHOOD SUCCESS

Global Snapshot

GOAL: Children Are Ready to Enter School and Are Successful in Primary School



387,289

children received literacy support



3 OUT OF 4

children reading at grade level



\$221,159,409 INVESTED

ANNE AND HER FAMILY CAME TO CENTRAL OHIO IN NEED OF HELP. A Learning Checkup with the United Way-funded Columbus & Franklin County Kids uncovered developmental delays in 4-year-old James. Anne learned how to help James develop his fine motor skills at home. But Anne was also pregnant, and her family was in crowded, temporary housing. A family coordinator helped connect Anne with resources to tackle all her problems. Now, the family is in safe, affordable housing; her son is getting the help he needs for kindergarten and she's just had her first prenatal check-up. Supporting a child often means helping the entire family get back on track.

77,367

volunteers



45,242

early childhood staff trained to provide quality programs

5,407

United Way community partners

389,891

children enrolled in high-quality early childhood programs



426,770

families provided with resources and training

180

policies promoted, enacted, or modified to promote childhood success

68%

of children are proficient on kindergarten readiness assessment



77%

of children achieved developmental milestones

88%

of children improved school attendance

YOUTH SUCCESS

Global Snapshot

GOAL: Youth Gain the Knowledge, Skills and Credentials to Obtain Family-Sustaining Employment



2,007,962

youth participated in school and/or community-based programs



9 OUT OF 10

Youth graduated high school on time



\$192,851,891 INVESTED

JOBS AREN'T ALWAYS FOR SPENDING MONEY. High school junior Maria wants to help her family out, so she's seeking internships working with kids or in the health sciences. She's one of 400 youth in the San Francisco Bay area who came to United Way's MatchBridge Youth Jobs + Resources Fair to tap into job readiness seminars and talk with 70+ employers together from retail, hospitality, food services, health and technology sectors. Some 93 of them landed internships on the spot. It's just one of the strategies that United Way and its partners are pursuing to help every young person get a good job.

49,666

volunteers



3,588

United Way community partners

115,863

youth received job skills training



80%

of youth developed soft skills such as communication and time management

85%

of youth earned passing grades in core subjects



86%

of youth maintained satisfactory or improved school attendance

7,583

youth development staff trained to provide quality programs

98

policies promoted, enacted or modified to promote youth success

66%

of youth gained post-secondary, further education or credentials

98%

of youth transitioned from middle to high school on time

ECONOMIC MOBILITY

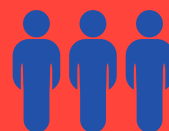
Global Snapshot

GOAL: Individuals/Families Improve Their Socioeconomic Status



1,014,944

individuals accessed affordable housing, financial products, and services



2 OUT OF 3

Individuals increased disposable income by accessing benefits and/or reducing costs



\$196,055,322 INVESTED

WILKEN WAS A HAITIAN REFUGEE, BARELY MAKING IT and daunted by what it takes to make it in America. But his best step forward was finding a financial coach at United Way's financial opportunity center. United Way brings together job services in "one-stop shops" in six poverty-ridden areas around Boston. Wilken got job training and job-search help, opened a savings account and started building credit. His coach also helped him navigate the DMV process to get a license, as he saved for a car. Two years later, Wilken has a job, and is a productive and self-sufficient community member.

5,135

financial sector staff trained to deliver quality services



64,171

volunteers

687,982

individuals received job skills training



67%

of individuals increased their wages



186

policies promoted, enacted or modified to promote economic mobility

3,488

United Way community partners

14,770

individuals earned job-relevant licenses, certificates, and/or credentials

48%

of individuals gained employment

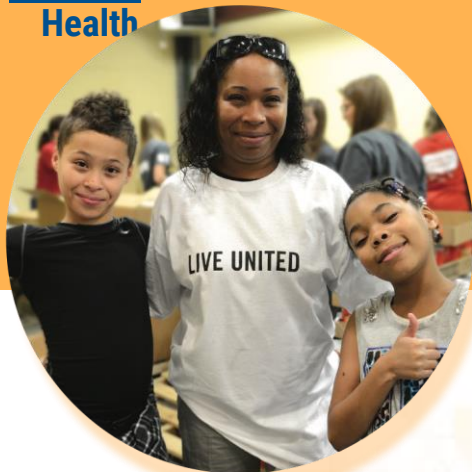
\$651,899,079

tax refunds returned to local economies through VITA

ACCESS TO HEALTH

Global Snapshot

GOAL: Individuals/Families Have Access to Healthcare and Improve Their Health



3,105,010

individuals participated in physical activity, healthy food, access, and/or nutrition programs



85%

of children/adults adopted healthy behaviors



\$194,154,722 INVESTED

AFTER TRENTON CUT BACK HIS WORK HOURS to take care of his mother 24-7, he lost his health insurance. As a diabetic, he worried about his health and finances. He called 2-1-1, a United Way-funded helpline in Milwaukee, for help. He was referred to another United Way-funded program, staffed by volunteer medical professionals who gave Trenton insulin – and medical management advice. “One of the doctors recommended I take my insulin at night before I go to work so that I can eat and regulate my sugar through the night. No one had ever suggested that before.” Efforts like that are helping the uninsured and underinsured get the care they need at the right place and at the right time.

68,630

volunteers



5,035

United Way community partners

136

policies promoted, enacted or modified to promote health



427,512

individuals secured health insurance

93%

of babies born at a healthy weight



7,153

health sector staff trained to deliver quality services

1,725,983

health sector staff trained to deliver quality services

91%

of mothers accessed prenatal care

27%

of children/adults achieved a healthy weight

Corporate Snapshots

CORPORATE SNAPSHOT

Wells Fargo

United Way and Wells Fargo are partnering to help every person become more financially stable. Together, we're making it possible for financial coaches to help people start or grow a business, save for a house, or reduce debt. We're galvanizing communities to combat hunger. And we're helping team members build stronger communities where they live and work, whether that's through volunteering or charitable giving.

CHILDHOOD SUCCESS

GOAL: Children Are Ready to Enter School and Are Successful in Primary School



86,586

children received literacy support



5 OUT OF 6

children reading at grade level



\$67,070,817 INVESTED

16,846

volunteers

73,341

children enrolled in high-quality early childhood programs

23

policies promoted, enacted, or modified to promote childhood success

75%

of children are proficient on kindergarten readiness assessments

12,785

early childhood staff trained to provide quality programs

871

United Way community partners

77,753

families provided with resources and training

71%

of children achieved developmental milestones

93%

of children improved school attendance

YOUTH SUCCESS

GOAL: Youth Gain the Knowledge, Skills and Credentials to Obtain Family-Sustaining Employment



527,848

youth participated in school and/or community-based programs



9 OUT OF 10

youth graduated high school on time



\$55,313,633 INVESTED

848

United Way community partners

38

policies promoted, enacted, or modified to promote youth success

10,918

volunteers

88%

of youth maintained satisfactory or improved school attendance

1,155

youth development staff trained to provide quality programs

64%

of youth gained post-secondary employment, further education or credentials

48,540

youth received job skills training

9,517

youth developed soft skills such as communication and time management

87%

of youth earned passing grades in core subjects

ECONOMIC MOBILITY

GOAL: Individuals/Families Improve Their Socioeconomic Status



213,795

individuals accessed affordable housing, financial products, and services



23,724

individuals increased disposable income by accessing benefits and/or reducing costs



\$58,927,610 INVESTED

3,151

financial sector staff trained to deliver quality services

8,526

volunteers

281,064

individuals received job skills training

\$141,057,337

tax refunds returned to local economies through VITA

24

policies promoted, enacted, or modified to promote economic mobility

1,143

United Way community partners

8,412

individuals earned job-relevant licenses, certificates, and/or credentials

50%

of individuals gained employment

2,276

individuals increased their wages

ACCESS TO HEALTH

GOAL: Individuals/Families Have Access to Healthcare and Improve Their Health



269,384

individuals participated in physical activity, healthy food, access, and/or nutrition programs



67%

of children/adults adopted healthy behaviors



\$57,009,758 INVESTED

1,144

United Way community partners

32

policies promoted, enacted or modified to promote health

245,125

individuals secured health insurance

80%

of babies born at a healthy weight

7,115

volunteers

2,165

health sector staff trained to deliver quality services

520,494

individuals accessed healthcare services

96%

of mothers accessed prenatal care

1,217

children/adults achieved a healthy weight

AS A FINANCIAL COACH FOR THE UNITED WAY OF MIAMI-DADE'S CENTER FOR FINANCIAL STABILITY, Rudy's job is to help people get their finances on track. "I always try to first understand their story, where they're coming from and where they hope to go," says Rudy, who grew up in Miami. He offers tools, information, and support needed to purchase a home, manage debt, or improve credit scores. "It's hard to describe the sense of satisfaction when you see someone who is able to get their life in order, and to know you were a part in making that happen." He takes pride knowing he can change the course of someone's life, and help impact future generations.



Reporting by GCL Company



- **Ernst & Young** - 100% (10/10)
- **U.S. Bank** - 100% (7/7)
- **Wells Fargo** - 88% (15/17)
- **Bank of America** - 86% (12/14)
- **PWC** - 86% (12/14)
- **Target** - 86% (12/14)
- **Suntrust** - 85% (11/13)
- **Costco** - 83% (5/6)
- **Deloitte** - 83% (20/24)
- **AT & T** - 82% (18/22)
- **Eli Lilly** - 80% (4/5)
- **Macy's** - 78% (7/9)
- **UPS** - 77% (17/22)
- **Fed Ex** – 75% (9/12)
- **Nationwide** – 74% (14/19)
- **GE** – 73% (8/11)
- **Kellogg** – 73% (16/22)
- **Johnson & Johnson** – 71% (10/14)
- **Publix** – 70% (7/10)
- **Dr. Pepper-Snapper** – 64% (7/11)
- **GM** – 60% (9/15)
- **3M** – 50% (3/6)
- **P&G** – 50% (2/4)
- **Dow** – 40% (2/5)
- **Cargill** – 33% (3/9)
- **Kimberly Clark** – 50% (5/10)

Companies that will receive Snapshots in 2018...

2017 Snapshots

3M
AT&T
Bank of America
Dow
Cargill
Costco
Deloitte
Dr. Pepper Snapple
Eli Lilly
Ernst & Young
FedEx
General Electric
General Motors
Johnson & Johnson

Kellogg
Kimberly Clark
Macy's
Nationwide
Proctor &
Gamble
Publix
PwC
SunTrust
Target
UPS
U.S. Bank
Wells Fargo

Added for 2018

Anthem
Bank of New York Mellon Corp
BMO
Comcast
Cummins
Duke Energy
Ecolab
Enterprise
FCA
Fifth Third Bank
Fluor
Ford
General Mills
IBM
ITW

John Deere
Kroger
Principal
Texas Instruments
Whirlpool



Communicating the GRF

Tips to Leveraging the GRF

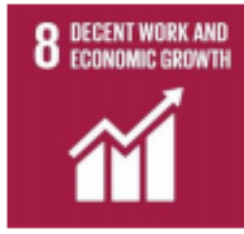
1. Discuss with Board & key volunteers
2. Engage Affinity Groups
3. Brief High Net-Worth Donors
4. Use in CEO Meetings
5. Include in Donor Communications
6. Brief our Local/Regional GCL Leaders

Sustainable Development Goals

17 Goals; 169 Targets



SDG Alignment to United Way U.S. Impact Goals



✓ 5 million people will get better jobs



✓ 90% of people will be healthier



✓ 95% of students will graduate high school ready for college and career



✓ United Ways will engage 10 million people to build inclusive, equitable and stronger communities in 1,000 cities and towns across America

Open Discussion

- How does your United Way currently communicate your impact with donors and corporate partners?

Steps for Reporting Data in the GRF

6 Steps to Reporting GRF Data

1. Review United Way GRF indicators
2. Review UWW Indicator Guide
3. Identify, compare, and align indicators that both UWW & your United Way measures
4. Determine which of the services & programs your United Way funds that could be aggregated and reported
5. Identify local data sources
6. Enter your aggregated data for the indicator into the GRF via Clear Impact's reporting platform

Open Discussion

- Does your United Way collect common indicator data from your funded partners and agencies?
- Does your United Way measure outcomes data?
- If you collect outcomes data, what steps did you have to take to get there, if you don't what are your barriers?

Next Steps, Resources & Tools

Next Steps

- **Reporting period** is now! (Extension through 6/29!!)
- Not too late to **participate**: email results@unitedway.org
- Need **technical support** on your account (i.e. change users) email support@clearimpact.com
- UWW will work on aggregating data for updated infographics this summer, expect to see webinars early fall with access to your customizable infographics in time for the end of Campaign

Common Reporting Questions

Q. What is the reporting year?

Most indicators will be collected on an annual basis for the previous calendar year (e.g. in 2018, report 2017 data). So, people reporting in 2018, for example, using a fiscal year will report 2016-2017 data and label it “2017” in the system. The perceived lag time was incorporated to allow for sufficient time for data to be processed for the vast majority of United Ways, and while more recent data may be available, having consistent reporting periods across United Ways remains important.

*From UWW Indicator Guide, pages 14-15.

Q. How do I calculate indicators that are percentages?

Indicators that are reported as percentages are outcomes in the GRF. They give us the ability to determine, of the individuals/ families being served, who achieved the *desired result* (e.g. entered kindergarten ready, graduated HS on time, found a job, improved their physical fitness and nutrition).

To calculate the percentage of any indicator, the denominator should be the aggregated sum of all individuals that received a particular service/support; the numerator should be the subset of individuals served that achieved a desired state based on receiving the support.

Example

Numerator = Total the number of children participating in each program supported by United Way who are *proficient in reading* at the end of 3rd grade or 4th grade

Denominator = Total the number of children *participating in the programs* supported by the United Way *who were assessed* at the end of 3rd grade or 4th grade



**CS6 Percent of children (K-3)
served reading at grade level**

Q. What should I report for \$ invested?

Resources include a United Way's total annual investment in agencies, programs, services, and initiatives, and United Way staffing and administrative costs directly related to the reported Impact Area. All sources of revenue should be considered investment, excluding designations and transfers to other United Ways. Sources of revenue include, but are not limited to, funds raised through the annual campaign, grants received by United Way, funds under management by the United Way, and investment income.

How many indicators should I report?

At minimum, you should report resources invested and volunteers engaged for each impact area that your United Way is working in.

Most United Ways are implementing programs, initiatives, and/or allocating resources in 3 of the 4 impact areas (i.e. childhood success, youth success, economic mobility, and access to health). So local United Ways should report on at least 6 indicators.

However, the more data that is reported, the more impressive the numbers are when aggregated, so all UWs should be encouraged to report on as many indicators as possible.

How should I count volunteers?

Volunteers include those individuals directly engaged by United Way, and those who engage in work led by partners and agencies supported by United Way. As much as possible, count volunteers engaged only one.

For example, if your United Way has a Volunteer Committee that supports your allocations to agencies/programs for all impact areas, you can either report them all in one impact area, or equally divide them across the 4 areas.

Do you want us to have “unique” counts?

Yes, as much as possible, please try to avoid counting individuals served or volunteers engaged more than once. However, we recognize that in some instances it may be hard to do so and even okay to count a person more than once.

For example, if your United Way reports on the number of community residents engaged as part of ongoing convenings (e.g. community conversations), it is likely that the same individual may attend more than one meeting and so we anticipate some duplication in this indicator.

Thank You!