

Tips for Leveraging Education, Income and Health Strategies

United Way Worldwide and local and state United Way leaders created *Charting a Course for Change: Advancing Education, Income and Health through Collective Impact*, with guidance from national issue experts and current research, to help you advance your impact work. It includes expert-vetted strategies and high-impact implementation approaches to support your education, income and health work, along with meaningful roles United Ways can play. Wherever you are in your impact work, we hope this can help you chart your own course to lasting community change.

We encourage you to use *Charting a Course for Change* to **engage your staff, volunteers, partners and community**. Many leaders in the United Way network are using “think pieces” like this to inform and inspire individuals and organizations, as part of a larger effort to engage the community in solving its pressing education, income and health challenges.

Here are a few ideas for using *Charting a Course* in focusing staff and board members, in planning, in coordinating with community partners and funded agency leaders, and in outreach to workforce campaign companies, major investors, opinion leaders, funded agency leaders and others important to making lasting change.

- ❑ **Conduct an internal scan** – Review your community's impact agenda to see where your strategies correspond with what the experts say could make the biggest difference to the greatest number of people.
- ❑ **Engage your funded agencies and other community partners** – Pull together your funded agencies, other grantees, and community partners working in each issue area, and facilitate a conversation about your strategies, both individually and collectively. This could lead to deeper conversations about shared community goals and aligned strategies.
- ❑ **Broaden the conversation** – If you're partnering with a particular group on a particular issue – like health providers and county health directors working on the county health rankings (www.countyhealthrankings.org), consider broadening the conversation to include the other two issues. For example, talk with health providers about the impact of financial stability and education on health, and consider together whether any of the income and education strategies ought to be in the scope of your shared and aligned work or, alternatively, whether you can coordinate your work with other community partnerships working on those issues. You can also encourage partners affiliated with local, state or national networks to share *Charting a Course* with their networks.
- ❑ **Connect with specific issue experts** – Consider reprinting the issue-specific chapter (with the document's cover and introduction) as handouts for issue-specific leaders. Host an informal lunch or breakfast (not a media event) to get their feedback, suggestions and insights.

- **Identify relevant research** – What data do you have (or have access to) that indicates whether the six areas addressed in the report are pressing issues in your community? For example, are there any high schools that produce large numbers of dropouts in your community? Some 15% of America’s high schools produce more than 50% of our dropouts and close to 75% of minority dropouts. Their “feeder” middle and elementary schools are generally struggling just as much. Dr. Bob Balfanz at Johns Hopkins University, a United Way partner in education work, has mapped the country to identify the 5,000 high schools in question. Is your community listed? If so, those schools need your help! Find out more at:

http://new.every1graduates.org/wp-content/uploads/2012/03/Locating_the_Dropout_Crisis.pdf

- **Build effective community plans** – When your collaborative partnership around a pressing community issue begins to explore what actions to pursue, strategies related to the issue in *Charting a Course* can jumpstart the discussion. When your focus turns to how to implement selected strategies, the implementation approaches in the report can spark ideas for local adaptation. As your United Way considers its own contributions to advancing the work, the meaningful United Way roles from the report suggest ways you can leverage your experience, networks and expertise.
- **Document your alignment** – Create a one-pager that lifts up how your United Way and its community partners are pursuing strategies experts say will move the needle on education, income or health. It’s a good chance to recap your strategies, interim results and successes. For example, if your collaborative partnership is taking a sector-based approach to workforce development, you can emphasize that experts advocate this as a core strategy for increasing family-sustaining employment nationwide.
- **Brief your board** – Give copies of your alignment one-pager (mentioned above) and *Charting a Course* to your board (current and past), and facilitate a board conversation about how your United Way’s work fits within this frame. How do these strategies align with the latest strategic plan your board has approved?

Is your board still in the early stages of adopting community impact, discussing opportunities for going deeper into education, income or health? Many United Ways are still transitioning from fundraising to mobilizing. If your United Way is looking for ways to take it to the next level, reviewing these strategies could spur deeper thinking – for your board and partners.

- **Connect volunteers to the issues** – Ask your board chair to send the link to to all your volunteers (including anyone on your impact councils, allocation committees and affinity groups, and to any participants in your Day of Caring or Day of Action events), highlighting how important volunteers are to executing the strategies your United Way is pursuing. Restate any call to action for volunteers or give them a heads up about upcoming volunteer events.
- **Use as opinion leader outreach tool** – Assuming you have an ongoing engagement strategy to keep in touch with your investors, volunteers and advocates, use a link to this document and a brief synopsis as content for an email, blog post, newsletter item, etc. You can frame it as interesting national research, or make a direct link with the work you’re engaged in locally.

- **Frame the issues for policy makers (local, state or federal)** – Whether or not you are advocating for an education, income or health policy agenda, the framing in *Charting a Course for Change* might be useful in helping policy makers gain greater understanding of how United Way sees the issues, and to better understand the United Way point of view.
- **Help orient new partners and board members** – Fold this document into existing efforts to bring new partners or board members up to speed about the kinds of comprehensive efforts and collaborative partnerships required to create lasting change and the roles United Way can play in those efforts.
- **Share with workforce campaign partners** – Do you know what the CEOs of your workplace campaign partner companies care about? Share *Charting a Course* with them (in person, via email or snail mail) and have a CEO-to-CEO conversation about the education, income and health issues and their thoughts about the strategies. Focus the conversation on the issues, not on raising money. Create a follow-up strategy for your campaign coordinators to continue to use the document to open conversations about the issues with their company contacts.
- **Brief the media** – Hold an informal briefing or breakfast to introduce media leaders to the document. Discuss how your community is impacted by the intersection of education, income and health challenges. Help media leaders understand the strategies and ask them their thoughts about what your community needs. (This could be a rich conversation, but is not about “pitching a story.”)

Want more copies of *Charting a Course for Change: Advancing Education, Income and Health through Collective Impact*? You can download it on United Way Online, at <http://online.unitedway.org> in the education, income or health sections or from UnitedWay.org:
http://unway.3cdn.net/5872dd81d8ce449dff_1qm6yxly7.pdf

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