



*United Way of Northern Nevada and the Sierra*

# **DIRECTION-SETTING PROCESS 2013-2014**

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**United Way of Northern  
Nevada and the Sierra**



## BACKGROUND

Like many not-for-profit organizations, the United Way of Northern Nevada and the Sierra (UWNNS) experienced dramatic reductions in its resources under management during the Great Recession. The community campaign that had raised \$2.9 million in 2008 produced only \$1.7 million in 2012, and the community impact distribution declined from \$1.7 million in 2008 to less than \$1 million in 2012, despite the fact that the service area of UWNNS had grown to 139 zip codes due to the assimilation of the five county region formerly served by United Way of the Great Basin. Workplace campaigns yielded less and less due to personnel reductions in donor entities, and the competition for fundraising accelerated, as even partner agencies stepped up their own direct fundraising efforts with both local and national donors.

The organization managed prudently, reducing staff by six positions and cutting operating expenses, but *the Board recognized that a fundamental transformation would be necessary if the mission of the local United Way was to live on, and if the agencies and individuals who rely upon the United Way were to continue to be served at critical levels. The focus would need to change from simply how do we raise and allocate money, to what do we need to do to achieve the greatest positive impact for our people?*

In October of 2013, the Board determined that the transformation that would best preserve the integrity of the United Way mission would occur through the *identification of an overarching focus issue or strategic goal upon which to set the future direction and the United Way's message of hope and impact.* In November 2013, after review of proposals, the Board selected Simon and Associates Consulting, led by Katy Simon, MA, to guide the process, based on the firm's long history of human services experience in the region and engaged KPS3, led by Stephanie Kruse, to manage the community relations and marketing aspects of the project, including overseeing the development and execution of a community survey by Sara Hart of InfoSearch International.



# FOCUS GROUP PROCESSES

## The Direction-Setting Process begins

A three-pronged effort to identify the focus issue got underway in January, 2014. One path of the issue identification process involved **face-to-face focus group meetings** in small groups with community leaders, partner agencies, and community volunteers including the UWNNS Executive Committee, the UWNNS Board, the UWNNS Community Impact Committee and the Councils for the Education, Health and Financial Security funding categories. A second path focused on **research and quantitative data** regarding the specific issues and challenges faced by the populations served. The third path involved the preparation and conducting of a widely available **community survey** to assess community perceptions in the 139-zip code region. The three paths were chosen to permit the widest possible opportunity for input and feedback on both the process and the focus issue, as well as the United Way's fit to support the selected issue, and to insure that the issue chosen reflected true, documented needs of the people of the region.

## Focus Group Process: Community Leaders

To launch the input-gathering process, an invitation was sent to more than 80 community leaders from throughout the region, including human services agency directors; legislators; city council members; elected and appointed officials from cities, counties and State government; media representatives, business executives, donor organizations, officials from K-12 and higher education, foundations, The Chamber, and others to attend a meeting January 29, 2014. The purpose of the meeting was initiate a community dialogue about the recent history, current state and the future direction of the United Way of Northern Nevada and the Sierra, and to gain these leaders' assistance in defining and prioritizing where best to place resources for the greatest good.

The community leaders took the draft version of the community survey and provided excellent feedback on the survey and on the proposed issues.

## Focus Group Process: Executive Committee

On February 19, 2014, staff and the consultant met with the UWNNS Executive Committee to brief them on progress and to solicit their input on any issues and concerns. The Executive Committee was provided with a copy of the draft survey and a timeline of the work plan. The work plan and process were blessed.

## Focus Group Process: Community Impact Committee and Councils

The second focus group session was a combined meeting of the UWNNS Community Impact Committee (CIC) and the Councils of the Education, Health and Financial Stability Councils, under the leadership of Tom Pfoh, Chair of the Community Impact Committee, and facilitated by Katy Simon. The participants were provided an overview of the recent history of the UWNNS leading up to this process. They were invited to share their comments regarding what they like about the Committee and/or the Councils, and what issues or concerns they have. They discussed the desired role of the CIC and Councils, and then were asked to provide their thoughts on the criteria for a good decision regarding the focus issue and future direction for UWNNS.

The desired role of the CIC and Councils was described as follows:

- Share expertise
- Insure a robust process that has credibility
- Be able to explain the decision and stand behind it
- Be vigilant about reflecting the needs of all 139 zip codes
- Insure that we think “outside the box”
- Make a recommendation to the Board regarding the focus issue
- Insure that the process and the decision are equitable and fair
- Be aware of how partners fit into the vision
- Insure that the decision is based on need and not on special interests

The criteria they suggested that the Board utilize in making its final decision on a focus issue included the following:

- Appropriate for all 139 zip codes
- Representative of the needs of various demographics, such as age groups
- Should address something important; systemic issues with documented need
- Should consider and issue that lacks government or other funding
- Should be something big not being met by other sources; something that fills a gap
- A BHAG (Big, Hairy, Audacious Goal)
- Something that is easy to talk about and hard to do
- Something about which the United Way can be a convener
- An issue about which the UWNNS Board is well-informed
- The decision process should include the perspectives of those being served
- Should be “fixable” by the United Way
- Consider what people in the year 2050 would wish we had worked on

The timeline for the process was then reviewed, with the plan that a decision would be made by the Board May 21, 2014.

## **Focus Group Process: UWNNS Board Retreat**

At its March 19, 2014 meeting, the UWNNS Board reviewed the project progress to date, the input from the focus group meetings, the results of the Community Survey, and narrowed down the issues upon which the process would focus from 15 to eight:

- Stabilize people in immediate need
- Children read at grade level
- Parenting skills – birth to kindergarten
- Middle school to on-time high school graduation
- Link people with needed services
- Access to quality, affordable child care
- Increase healthy behaviors
- Family financial management

## **Focus Group Process: Round Robin Sessions**

In April, two Round Robin Sessions were held with a broad array of community volunteers, donors, Board members, and partner agencies to help narrow down the list of possible leading roles for UWNNS. Two broad categories of “Successful Kids” and “Financial Stability” were discussed, with the agenda being to discuss “Why is this important?” and “How can positive change occur?” The goal was to address whether the issues were currently being adequately addressed, whether they met the criteria identified in previous sessions to become the focus issue, and whether UWNNS would have a leading or supporting role.





# RESEARCH & FINDINGS

## Research

Several sources of information were used to assess documentable needs and challenges in the 139 zip code service area. The UWNNS 2011 Community Opinion Survey Results were reviewed, as was the Cfed Assets and Opportunity Profile for Washoe County. Additionally, CIC Chairman Tom Pfoh presented statistics on graduation rates, grade-level reading proficiency, and correlations between children reading at grade level and later life outcomes such as high school graduation, employment, teen pregnancy, and incarceration.

## Community Survey

The Community Survey developed by InfoSearch International under the direction of Sara Hart was prepared and conducted to provide information on several dimensions. First, the survey provided demographic information to reflect the distribution of respondents across geographies, age, gender, knowledge of issues and the United Way, and education and income levels in order to identify the degree to which the results may have shown differences between various groups. Second, the survey provided a prioritization of the respondents' perceptions about various social issues. And third, the survey gave a snapshot of the respondents' attitudes toward the role that the UWNNS might play in addressing the issues identified, and whether the issues were being adequately addressed already. In addition, open-ended questions were included which allowed respondents to share any thoughts or comments that the survey generated for them.

The survey was emailed directly to a database of more than 4,000 donors, community leaders and human service agency personnel, which produced 63% of the responses. In addition, the survey was posted on the UWNNS website, and media releases drove people to the website to insure that the survey was widely available during the time it was open, from February 5 through 20, 2014. The website produced 37% of the responses.

A total of 356 responses was received. Respondents were significantly more likely that the general population to be female, age 45 to 64, Caucasian/white (non-Hispanic), college graduates, married, and/or with an annual household income of \$100,000 or higher.

## Community Survey cont.

The 15 identified Focus Issues were ranked as follows (with 5 being Greater Priority and 1 being Lesser Priority):

• Stabilize people in immediate need	4.27*
• Children read at grade level	4.22*
• Reduce neglect, abuse of children, family	4.22*
• Mental health prevention, treatment	4.07
• Parenting skills – birth to kindergarten	3.99
• Middle school to on-time HS graduation	3.98
• Access to primary health care	3.95
• Youth and adult job training, coaching	3.93
• Link people with needed services	3.88
• Access to quality, affordable child care	3.86
• Leadership development for youth	3.77
• Increase health behaviors	3.75
• Seniors, disabled – independent living	3.66
• Family financial management	3.64
• Transportation for people in need	3.50

The issues marked with an asterisk (\*) were identified by the consultant as having a statistically significant higher priority than the remaining issues.

As previously mentioned, at the March 19 Board Retreat, the 15 issues were reduced to eight:

- Stabilize people in immediate need
- Children read at grade level
- Parenting skills – birth to kindergarten
- Middle school to on-time high school graduation
- Link people with needed services
- Access to quality, affordable child care
- Increase healthy behaviors
- Family financial management



## CONCLUSION

On May 8, the Community Impact Committee met and reviewed all the information compiled in the process to date. The Committee was advised by staff that two of the identified issues, Stabilizing people in immediate need and Linking people with needed services, would continue to be the core mission of the UWNNS, and were less issues than core activities of the United Way. In addition, Family Financial Management has an active interdisciplinary community team working on it regularly and is less in need of the United Way's full attention.

Following extensive discussion, the Community Impact Committee voted to recommend to the full UWNNS Board that the Focus Issue be

### ***Children read proficiently at grade level by 2020***

The UWNNS Board met on May 21, 2014, and following a review of the entire process and the justification for the proposed recommendation presented by CIC Chairman Tom Pfoh, the Board voted to adopt the recommendation as the Focus Issue for the United Way of Northern Nevada and the Sierra. The Executive Committee was appointed as an initial Transformation Council to begin the implementation.

# ACKNOWLEDGMENTS

No process of such magnitude can be accomplished without the dedication of many individuals.

In particular, the following individuals deserve special recognition:

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Sara Hart, *InfoSearch International*

Mary-Ann Andrews Merrett, *UWNNS Board Chair*

Tom Pfoh, *UWNNS Community Impact Committee Chair*

Shera Alberti-Annunzio, *UWNNS Community Impact Committee and Board Member*

*Members of the UWNNS Board*

*Members of the UWNNS Community Impact Committee*

*UWNNS Partner Agencies*

*And the people we serve, who face often heart-breaking challenges every day with dignity and hope for a brighter future.*

*For additional and supporting materials regarding this report,  
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