

Issue Focus in Action *A Case Study*

"It is hard to be all things to all people, which is the old, typical United Way, and be focused on something that makes an impact. You can't be both."



United Way of Jackson County

Location: Jackson County, MI

Community: Blue-collar, population of 160,000

Issue: Financial stability

Staff: 14 employees

Board: 13 members

Annual revenue: \$5 million

Key Programs: JobSTAR, 2-1-1, CARE Plus

The Envy of Other United Ways

Ten years ago, United Way of Jackson County would have been the envy of most every United Way. "We were very good at finding grants and developing new partnerships," Ken says. In the past, United Way of Jackson County had grant funding for programs and partnerships that exceeded their campaign revenue. But this came at a price: "We were all over the map – it was a lot of work. It was hard, and it was stressful."

Even a staff of 10 was not enough to make the work easier. Every week they wondered: "What new business we're going to have to learn, or what new area we're going to get dragged into that we don't know the politics."

As Ken would say, "Where is the next bombshell coming from?"

Something Has Got to Give

Ken realized the future of United Way of Jackson County needed to be different. "We struggled for a couple of years sorting stuff into the three buckets – education, income, and health," Ken says. "We scratched our heads and said this is a sorting game. We knew it wasn't really getting us where we needed to go. We were initially hopeful that we could create real improvements in education, income, and health, but the longer we tried, the more elusive that became."

Ken recognized that the Issue Focus Model offered the unique opportunity for United Way of Jackson County to maintain and grow their relevance, sustainability, and impactfulness in Jackson County.

In the Beginning, There Was an Issue

In May 2014, the board of United Way of Jackson County chose poverty as their issue, adopted their bold goal, and developed a three-year strategic plan to transform their work to the Issue Focus Model.

Ken feels Perspectives' Direction-Setting and Strategic Planning processes for transforming to an issue focus "served United Way of Jackson County extremely well. The data analysis piece allowed everyone to understand the context we were in, and all the pre-work with the board prepared them for the kind of change that would be required. It prepared us for what was to come."

Although United Way of Jackson County could have picked to address any one of a variety of issues, poverty was the obvious choice. "It was very clear that poverty would be the right issue for our United Way to work on," Ken says. "People know poverty is a real issue here in Jackson County."

Experts with a Simple Message

While many United Ways struggle with their message, United Way of Jackson County does not. "We don't lead with our mission anymore. We lead with our bold goal," Ken says. "We are going to help 5,000 Jackson County residents develop a pathway to financial success by 2025. People get that. It is about true, lasting improvement in our community that can happen."

"Among our key stakeholders and the media, we are seen as an authority on poverty," Ken says. Ken knows that people who hear United Way of Jackson County's campaign presentations are getting the message.

"Everything we put out is about our single issue of poverty, how we changed how we are doing things, and how we think we can build a better Jackson by addressing the root causes of poverty," Ken says.

More Clarity About Making an Impact

"When you are really focused on a single issue, you understand a lot better what the community's capacities are and aren't," Ken says. "It makes it easier to start a program and convene your partners when poverty is your full focus. You have a bigger platform with a lot more clarity about where we can make an impact."

With an issue focus, United Way of Jackson County found that it became clearer which programs they should be supporting when they assessed each program against their issue and bold goal. "I do see us coming to the point where we identify specific programs and methodology in the future," Ken says. "We are doing that currently through our JobSTAR program."

We Were Ready, but the Media Never Called

In just three years, United Way of Jackson County has moved from funding 45 programs to 23 programs. This move was necessary to assure that United Way of Jackson County's investments directly supported their bold goal of helping people become financially stable.

Ken says the critical step in changing the programs that were funded was that "we communicated the heck out of the fact that the RFP we were going to release was focused on financial stability." United Way of Jackson County's RFP clearly specified four outcomes they were going to fund – all of which directly impacted financial stability. "If you cannot claim at least one of these financial stability outcomes, do not even bother to apply" was the message to partners.

Although United Way of Jackson County was concerned about partner agency backlash, there was no media onslaught or board calls.

Partner agencies said “We get it. We totally understand and can’t argue what you are doing. And we see we don’t have a place here.” Ken met personally with every partner agency that was no longer receiving funding to have honest talks about why that was. The RFP process shielded United Way of Jackson County from backlash.

“And the buckets of education, income, and health are gone,” Ken says.

Measurably Moving the Needle

Because of their single-issue focus on financial stability in Jackson County, United Way of Jackson County is investing strategically and deliberately. According to Ken, they no longer say “Here is your utility assistance – see you next year.” Instead, United Way of Jackson County is connecting programs in order to prevent people from needing utility assistance next year. For example, they refer people seeking utility assistance to a local credit union for coaching to manage finances. They give those same people an incentive to complete that coaching program by paying part of their utility bill. They also provide those in the program with a free license for an online money management program. If those in the program complete it successfully, they receive a \$100 bill credit.

United Way of Jackson County is actively developing a method for quantitatively measuring progress toward their bold goal. However, Ken is quick to cite many anecdotes of people whose lives have been changed by United Way of Jackson County’s CARE Plus program and their JobSTAR program. “We know that people are on the pathway to financial stability,” Ken says.

Dollars, Cents and Issue Focus

Like the campaign at many United Ways, United Way of Jackson County’s campaign has not grown much in the last few years. Unlike most other United Ways, however, United Way of Jackson County has an issue focus. “Our campaign has basically treaded water, trending down slightly year over year and that correlates with job losses in our community,” Ken says. “If we didn’t have an issue focus, our trend line would be looking a lot worse than it is now. Many people have told me they understand our work and love the work we are doing. They are fired up by our speakers and video. I honestly think it would have been a lot worse.”

While United Way of Jackson County’s campaign hasn’t grown, total resources under management totals over \$5 million. Only about \$1.6 million of that comes from United Way of Jackson County’s campaign. The campaign’s lack of growth has been mitigated by approximately \$4 million in grant funding and corporate sponsorships for United Way of Jackson County’s financial stability programs and initiatives.

Because of their focus on building financial stability, United Way of Jackson County has been able to obtain grants, corporate sponsorships, and government support to fund several of their initiatives. A grant from the Consumers Energy foundation funds one-on-one budget counseling. Other local companies, along with support from the State of Michigan Department of Health and Human Services, sponsor United Way of Jackson County’s Business Resource Network.

With Clarity Comes Happiness

With an issue focus comes clarity. One of the biggest benefits of adopting the Issue Focus Model for United Way of Jackson County was the ability to convene and motivate staff around that clarity.

Ken says “It makes all staff functions easier. Everybody’s job is clearer and that relieves the stress on employees. It is really stressful trying to do your job and you are not quite sure what performance measures you are trying to get – and you can’t measure them anyway. I think my staff feels a tremendous amount of relief now.”

Only one employee out of 14 has left United Way of Jackson County in the past three years.

All Aboard!

While a lot of United Ways struggle with board engagement, United Way of Jackson County is fortunate. Now that United Way of Jackson County is focused on building financial stability, Ken says: “Our board members love the focus. It is much easier for them to support an issue focus.” As a result, the board is becoming more empowered and active in fundraising.

“The board wants to help – they want to raise money,” he says. This desire to fundraise is demonstrated by the board’s current efforts to organize a golf outing in support of United Way of Jackson County.

Our Future is Relevant, Sustainable, and Impactful

So, after three years as an issue-focused United Way, Ken says: “We know our world now. We know what we’re doing in it, and it’s liberating and empowering in ways that a CEO won’t understand until she or he does it.”

He says: “We could have done this much sooner. Because we did it deliberately – thanks to Perspectives’ training and guidance – I am thrilled with how it has rolled out.”

“The work that we had to do to become issue-focused wasn’t hard at all, it was the right work. I thought it was more work trying to be all things to all people.”

Perspectives Consulting Group, Inc. is a research and consulting firm that has been working with United Ways across the United States since 1989. Based on years of research and experience working with United Ways, Perspectives developed the Issue Focus Model – the answer for United Ways seeking long-term relevance, sustainability, and impactfulness. Since 2015, Perspectives has focused exclusively on working with United Ways to help them successfully transform to an issue focus.

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