

The United Way's Way or Bust

by Rick Cohen

IF YOU HAVE WATCHED SUNDAY NIGHT Football recently, you may have seen a massive Dallas Cowboy tight end teaching blocking techniques to a bunch of pixie-sized kids sponsored by the United Way (UW). Pint-sized ballers bouncing off much larger pros: is this an unintended metaphor for the United Way's much-ballyhooed Community Impact Agenda? What constitutes this strategy that so many United Way affiliates around the nation have adopted?

The United Way PR juggernaut is impressive, ubiquitous, and hitting on nearly every consumer- and donor-tested theme that you can think of: athletes, celebrities, and kids all pressing every button possible for United Way contributions. But the old formulas haven't worked across the board. The United Way faces competition for charitable contributions from workplace donors as well as from community foundations' donor-advised funds for higher-end contributors, and it also faces various economic and demographic changes.

To combat these potential threats to its vitality, the United Way system has galvanized around the concept of what it calls the Community Impact Agenda as its new program strategy. Along with this comes the UW's remaking of its public image as a more vigorous, significant, and relevant system that will change communities and, not inconse-

quentially, maintain and increase charitable donations.

One United Way exec summarized the Community Impact Agenda as "a huge reinvention of the United Way,"¹ another as the "complete transformation of what the United Way is."² But is this approach a serious shift and a true effort to retrofit the United Way to the realities of charity and philanthropy in modern society? Or is the new United Way only a thick smokescreen of PR spin?

If you read the public statements of local United Way players as well as those of United Way of America (UWA) CEO Brian Gallagher, the new Community Impact Agenda is rife with language that sounds like it was drawn from a carefully crafted lexicon of muscular charitable imagery:³

- "Fewer, deeper relationships" (from the United Way of Central Ohio);
- "offering 'lasting solutions' to people in crisis, not 'quick fixes'" (from Silicon Valley);
- "a long-term strategy [to] address the root causes of problem issues" (from the United Way of Pitt County, North Carolina);
- "redefining goals into . . . focus areas" (from the United Way of Central Ohio);
- "a more targeted approach" (from the United Way of Monterey County, California);
- "to create broad impact in the community" (from United Way of Portland, Oregon);

- "very outcome driven" (from the United Way of Buffalo, New York);
- "ultimate outcomes and contributing outcomes to help reach them" (from the United Way of Cincinnati, Ohio);
- "cut off agencies not up to snuff" (from the United Way of Columbus, Ohio).

It is all very heady stuff.

Dorian Gray or Dionysus Reborn?

First, a word of caution. There are 1,300 local United Ways (which, due to a spate of affiliate mergers, represent a decrease from some 1,400 not too long ago), with their own managers, boards, and volunteers. All United Ways must comply with certain standards to rightfully use the United Way name and logo. But the system does not march entirely in lockstep, as Gallagher's predecessor learned when various larger "Metro One" United Ways reportedly balked at some of her initiatives. So even when a national United Way of America spokesperson proclaims that just about every chapter plans to adopt the new community impact allocation model,⁴ these chapters are likely to vary in how they do so.

Nonetheless, look into anything United Way-related, and you unearth at least three camps of visceral reactions. First are those who believe that the United Way is simply a relic of charitable fundraising past, devoted to perfecting the buggy whip of payroll-

deducted workplace donations, while most of the world has fast-forwarded to a different array of messages and techniques. The truth is that UW is hardly as monolithically dependent on workplace contributions in corporate campaigns or public-sector venues as state-employee charitable campaigns or the federal Combined Federal Campaign. As of the 2006–2007 UW campaigns, 65 percent (or \$2.64 billion, of the United Way's total fundraising of \$4.07 billion), came from individual donors in the workplace.⁵ But with only a 1.6 percent increase in its annual campaign over the previous year⁶ and fundraising totals that on an inflation-adjusted basis haven't fully recovered from scandals during the 1990s, the United Way still faces critics who see a system that gets a lot more attention than its meager growth and \$4 billion portion of \$295 billion in total charitable giving warrant.

The second camp sees the United Way as a modernized and scandalous version of Oscar Wilde's *Picture of Dorian Gray*. Poor United Way head Brian Gallagher wakes up in the morning, shaves, and finds the visage of the disgraced William Aramony staring back at him in the mirror, having purloined \$600,000 or so to support Aramony's high-flying lifestyle and various paramours. Or maybe it is Oral Suer and Norman Taylor, who guided the United Way of the National Capital Area in metropolitan Washington, D.C., to near collapse.⁷ Or maybe it's Jacquelyn Allen-McGregor, the vice president of finance at the Capital Area United Way in East Lansing, Michigan, who embezzled nearly \$2 million from the Capital Area United Way in East Lansing to support her interest in quarter horses.⁸ Or maybe it's Ralph Dickerson, the New York City United Way exec who walked off with a quarter million.⁹ Or maybe it's Eleanor Jacobs, the Santa Clara United Way leader who gave out grants based on a \$25 million fundraising total when the

reality was a full \$5 million less, leading to massive layoffs and Ms. Jacobs's firing.¹⁰

Of course, the image of a United Way system beset with charitable thieves is an unjust picture given the thousands of United Way employees and volunteers who have nothing in common with the likes of Aramony, Suer, and Dickerson. On the other hand, the United Way has faced serious criticism of its accounting practices, including a spate of revelations in 2002 and 2003 that United Ways in metro Washington, D.C.; Chicago, Houston, Austin, Tampa, Tucson, Milwaukee, and other localities had inflated their fundraising totals by way of double-counting the numbers.¹¹ The image of a United Way system hobbled by widespread accountability and ethical problems has been difficult for nonoffending United Ways to shake.

For the third camp, the United Way is just about a godhead, a shining, charitable city on a hill. They turn out to attest to the United Way catechism, sometimes prompted by CEOs to write effusive testimonials. They fervently believe in what others see as largely United Way PR, crafted by top-flight marketing and advertising firms.¹² In fact, legions of communities and nonprofits have benefited from the best of the United Way system and with little prompting will evangelize for it.

But whatever your view of the organization, there is no shortage of spin surrounding UW (whether it is a flood of tributes from grateful nonprofits or TV spots starring NFL stars or the ubiquitous local press coverage trumpeting the new strategies of the organization).¹³ Cutting through the PR to find the substance is a challenge.

Sudden Encounters with Community Impact

In 2001 the United Way launched a series of public-service announcements keyed to the theme of "performance" and "bringing people together to focus

resources on the most pressing problems in order to achieve measurable results." A core message was the Community Impact Agenda, tagged as "the focus of United Ways' work." Acknowledging variation from community to community, the national public-service announcements highlighted the United Ways' targeting of "poverty and violence—two of the most critical underlying social problems facing communities across the country."¹⁴

According to a 2001 United Way paper, the emphasis of the Community Impact Agenda was partnerships with a diverse array of business, government, and nonprofit organizations, with the following issues described as "the most universal across the United Way system": helping children and youth succeed, strengthening and supporting families, promoting self-sufficiency, building vital and safe neighborhoods, and supporting vulnerable and aging populations, each linked to several "common United Way community impact strategies" and "targeted results."¹⁵

Some United Ways and researchers reference the apparently seminal 1998 document *Community Impact: A New Paradigm Emerging, A White Paper on Change in the United Way Movement*. The paper suggests that this approach is not quite as new as it might appear for some United Ways and their member agencies. But it was not until 2002 when Brian Gallagher made the leap from his perch at a Columbus, Ohio, UW to the national office in Alexandria that the concept of community impact vaulted from a paradigm to a nationwide strategy for program allocations and fundraising.

According to a March 2007 *Non-Profit Times* interview with Gallagher, his United Way in Columbus and the United Way in Dane County, Wisconsin, had been "working in our communities to identify the four or five most critical human issues [and create] development strategies to address [the issues] . . . [and] turn those strategies into

Stories of United Way Community Impact Strategies

As a clear progenitor and model of the Community Impact Agenda in the United Way system, Dane County in Madison, Wisconsin, has created a “transformation diary” that indicates some of the dynamics of the Community Impact Agenda in action.¹ Some of the following are offered up as highlights of the new strategy:

- A civic journalism project of the Wisconsin State Journal focused attention on the school achievement gaps of minority children, which led to the recruitment of the local United Way executive chairing a multi-agency task force to work on the issue.
- In 1995 the effort evolved into the Schools of Hope program, with the United Way in the lead and several partners in tow, the recruitment and deployment of 1,000 adult tutors, and by 2004 the elimination of the achievement gap at the third-grade reading level.
- Encouraged by the Schools of Hope initiative, the United Way sought to capitalize on the concepts of multi-agency partnership and focused resources to build a “shared vision of change.”
- In 2000 a 50-member multi-agency task force conducted research, surveys, and forums, to develop the “Agenda for Change,” with seven “community visions” around which the United Way would focus its fundraising and grant allocations.
- To carry out these visions, the United Way then decided that “all funded programs must align with one of the seven visions that make up the Agenda for Change.”
- Half of the United Way’s funding was shifted to focus on the vision of the agenda. As a result, a dozen or so “unaligned” agency programs were defunded, while new agencies that fit the agenda were brought in as “partners.”

The United Way of East Central Iowa has an official Community Impact Agenda manual that explains its process in some detail.²

- In 2005 a community needs assessment was conducted by combining household surveys, focus groups, and research on community conditions and needs.
- In 2007, approval was given for the Agenda for Action in three areas (strengthening children and youth, strengthening families, and “strengthening connections”) and six subsidiary “focus areas.”
- For each focus area, intended measurable outcomes and indicators and specific “likely programs/activities to receive funding” were identified.
- A request for proposal (RFP) for agencies new to the United Way that could receive funding for their potential roles in these strategies was issued.

Dane County’s evolution into the Community Impact Agenda model began locally. It wasn’t an instance of a local United Way grabbing the latest model from the national headquarters and trying to adapt it to the local environment. Whether organic or mechanical, the community impact strategies as implemented locally appear to have several common elements:

- They have offered multiyear funding to agencies that fit the priority areas on the theory that making headway against difficult issues is a long-term process that is only thwarted by thinking in annual funding terms.
- They have issued RFPs to match agencies and programs to the Community Impact Agenda priority areas (as in East Central Iowa, for example, with a delineation of the specific programs the United Way has determined fit the priority areas).
- They require strategies for collecting data and documenting outcomes keyed to the Community Impact Agenda strategies.
- They defund “core” agencies—frequently the local chapters of national organizations such as the Salvation Army, Volunteers of America, the Boys & Girls Clubs of America, YMCA and YWCA—in part because their broad missions might not align with emerging local priorities in the action agenda.

According to the board chair at the United Way that serves metropolitan Austin, Texas, the strategy involves putting “enough focus and energy on a limited number of areas so we can see systematic change over a period of years.”³ This strategy is similar to Dane County’s and that of the United Way of East Central Iowa with some elements of articulated difference:

- United Way funding distributions are targeted toward education, financial stability, and health programs.
- Previously funded United Way grant recipients can receive designated grants from workplace donors but are not eligible for grants from the United Way’s Community Investment Fund if they do not fit the priority issue areas.
- Specific outcomes—in terms of number of people served, hours of service provided and so on—are required of these programs.
- Program initiatives to be run by the United Way itself have been generated and implemented.
- Efforts have been expanded to raise money from high-end donors through mechanisms such as the United Way Tocqueville Society to target gifts of more than \$10,000.

¹ “Transformation Diaries, United Way of Dane County” (<http://www.unitedwaydanecounty.org/reports/TransformationDiaries2005.pdf>).

² FY 2008 Community Impact Manual (July 1, 2007 through June 30, 2008), United Way of East Central Iowa, 2007.

³ The description of the Capital Area United Way Community Impact Agenda program is based on reporting in the Austin American-Statesman in Andrea Ball, “Local United Way Changing Direction,” the Austin American-Statesman, November 2, 2007.

investment products that donors could invest in, or people could volunteer for, or they could advocate public-policy reform around.”¹⁶ In 2002 the United Way of America launched the Community Impact Agenda, which Gallagher “sold” to 90 percent of United Ways in a 12-month period and of which almost half had “operationalized” by early 2007.

The story of how the Community Impact Agenda evolved at the Dane County, Wisconsin, United Way and how it has been defined in other localities reflects a strategy of focused funding distributions toward a small range of priority issues, larger and longer grants to agencies whose programs fit these issues, and a reduced United Way self-definition as a mere funding intermediary for human-service providers that focus on basic needs.

Some of this is clearly a new culture for the United Way. For example, the request-for-proposal process typical of Community Impact Agenda implementation is a competitive grantmaking approach akin to that of government agencies and foundations, but it is entirely new for UW. Critics of the United Way’s hidebound approach often give plaudits for defunding core agencies, which are frequently well funded on their own. But frequently crucial safety-net providers that simply don’t fit the new Impact Agenda priority items also receive rescissions and terminations. Each of the participating United Ways has significantly ratcheted up its community-needs-assessment studies, analytical studies, and in-house research and planning, absorbing an increased portion of dollars raised.

According to a United Way of America spokesperson, some 85 percent of chapters have “committed” in some form to the Community Impact “business model,” with the following “data points” as evidence of the strategy’s implementation:¹⁷

- 76 percent of United Ways have written impact strategies to achieve results in at least one issue area.
- 72 percent of United Ways ask donors to support specific community initiatives and partnerships as part of their resource development activities.
- 52 percent of United Ways have documented results at the community level.

A business model it is, as Gallagher himself noted in 2006:

Our “Theory of Change” starts with the belief that, in order to positively impact the most lives, we must act collectively as communities—changing the conditions that affect people. We do this by working on the most compelling issues that we have in common. We’ve learned that we must deal with the root causes of these issues, and that by working together we can achieve the greatest results. Our Theory of Change was supported by a business framework that starts with United Ways identifying “impact” strategies that improve lives. We’re turning them into investment products that our donors and our communities can support.

But local United Ways’ and partners’ priorities may not add up to a compelling message and image for the entire system. Accordingly, the national United Way of America will on occasion push themes that it deems timely and powerful, as Gallagher did in his 2006 speech after noting issues of poverty and unemployment: “The next stage of our community impact work must include those initiatives which are helping to create wealth or at the very least meet very basic subsistence needs.” At the ground level, there may be several common issues rising to the surface from these impact strategies, but national may also generate cues about which messages best connect with emerging and new donors.

Tackling Root Causes

While long known for promoting “outcome measurements,” which most people translate as measuring impact rather than simple nonprofit program outputs, the United Way appears to mean—or wants to appear to mean—something different. Current UWA board chair and former U.S. Department of Transportation Secretary Rodney Slater has proclaimed that the United Way is becoming an “impact organization.”¹⁸ But what kind of impact does Slater mean? In Portland, Oregon, for example, the United Way began as early as 2001 to refocus its funding efforts to “create broad impact in the community” accompanied by a new set of measurements of funded agencies “with a focus on the root causes of poverty.”¹⁹ Cincinnati United Way’s Agenda for Community Impact is described as aiming “to get the biggest bang from contributors’ bucks while seeking to address root causes of problems before they lead to other bigger problems.”²⁰ Across the nation, this language of root causes is taking hold: many United Ways say they now target distributions to address “root causes” rather than “Band-Aid” solutions.²¹

Digging through the language, the notion of having an impact on the root cause of social issues appears fundamentally to be a plan to narrow the UW’s focus on a limited number of issue areas—that is, prioritizing and concentrating some portion of United Way grantmaking in areas identified through community surveys or other mechanisms. The underlying assumption of the United Way’s new approach is that prioritization achieves a level of impact that previous, more widely dispersed support of a local human-service provider infrastructure might not have accomplished.

But the areas of emphasis are often quite broad. In Monterey, California, for example, the emphasis is on affordable housing—clearly a new focus for many UWs listening to their constituents—as

well as on children and youth,²² a catch-all that in most communities encompasses a multitude of providers. San Jose's focus is on four huge swaths of nonprofit endeavor: "human-service needs, including emergency housing assistance and eviction prevention; services for children targeting early-childhood education and increasing the high-school graduation rate; and adult self-sufficiency, including job training and learning English."²³ The United Way serving central Maryland has focused on four broad "impact areas": basic needs, school readiness, family safety, and youth achieving potential.²⁴ Reputedly one of the most advanced United Way affiliates in implementing this new strategy, the UW of Cincinnati has established as top priorities "making sure children are prepared to enter kindergarten; helping young people succeed in school and graduate from high school; and helping families and individuals achieve self-sufficiency through sustained employment,"²⁵ all mammoth areas addressing complex, intractable social problems.

The language is hard to penetrate, but by addressing root causes it appears that some agencies are simply refocusing attention on intervention points that make sense.

In Battle Creek, Michigan, for example, the United Way discovered that teenage pregnancy was positively correlated with the problem of illiteracy, prompting a shift of funds into programs focused on literacy skills.²⁶ In the Northwoods region of Wisconsin, United Way agencies discovered that it made sense to provide financial assistance and family counseling services at the food pantries sought out by poor families there.²⁷ Rather than a focus on outcomes, impact, and root causes, these strategies look more like United Ways—with nonprofits on the front lines doing the work—thinking systematically about how best to reach people in need. It is as though they all discovered the utility of "logic models"²⁸ in the

design of human-service delivery programs. But for fundraising purposes, logic models lack the cachet of "impact" and "root causes."

Given the exceptionally limited financial resources of most United Ways, what constitutes big-impact strategies for addressing the root causes of social problems? Sustaining a nonprofit social-change infrastructure with core operating support grants? Providing resources to organizations that do public-policy advocacy so that the much larger amounts of public funds dedicated to these "community impact priorities" get delivered effectively to the constituencies that need them? Despite the vigorous efforts of United Way-funded organizations to collect data on outcomes, it is not clear that as a business model the Community Impact Agenda can alter much about the *root causes* of social and economic problems. Even the largest and most successful United Ways—some of which have seen less-than-increasing donation levels—face practical limitations attacking the root causes of complex community problems given their sometimes constrained financial resources.

Sleeping with the Enemy: Large Funders' Expectations

Remember Julia Roberts as "Erin Brockovich," an unlikely environmental activist going after a California utility company that was polluting local groundwater? In that true tale, the offending company was none other than Pacific Gas & Electric (PG&E), later an acquisition of Kenneth Lay's Enron empire. The once-bankrupt PG&E is now a United Way mainstay, with its employees having raised \$3.3 million for the United Way in the 2007 campaign,²⁹ and the corporation has added charitable grants to UWs in a number of California localities.³⁰

When the AFL-CIO toyed briefly with creating its own alternative to the United Way called the Union Community Fund (UCF), the few union activists

backing the UCF model were distressed that the charitable giving of workers like those at PG&E ended up benefiting the corporation's PR rather than the union's.

Corporations are less and more than they used to be in UW's world. On the "less" side, corporate fundraising campaigns with the United Way at the helm or as the exclusive beneficiary appear to have declined. According to a 2000 report from America's Charities, one of the United Way's most significant national competitors (albeit a tiny source of competition at \$17 million or so when compared with the United Way's billions), the participation of corporate employees in workplace-giving campaigns declined from 47 percent of employees in 1988 to 35 percent in 1998, and only 25 percent of corporate employees said they work in companies with workplace-giving campaigns.³¹

In many localities, it isn't a matter of corporations walking away from the United Way monopoly, but rather a problem of a declining corporate workforce as corporations close and relocate. Rochester, New York, provides a stark example. The shrinkage of Rochester's major private-sector employer, Eastman Kodak, whose employee contributions to UW dropped by half in the past decade, shows up starkly in United Way campaign results: In 1996 the United Way generated 45 percent of its \$37 million campaign total from 10 top givers with strong corporate participation, but 10 years later, the 10 top workplace campaigns generated only 40 percent of a \$34.5 million campaign, dominated not by corporate workplaces but by the public-sector employees of the city of Rochester and the University of Rochester.³²

At the same time, to reach campaign goals in the face of declining workplace and other donations, the United Way has turned to corporations for infusions of philanthropic giving. In 2004, for example, the United Way of Central Indiana took special requests to Eli Lilly

Making Impact with Limited Resources¹

As it targets some of the most intractable social problems, what resources can the United Way (UW) bring to bear? Nationally, the United Way aggregate fundraising totals continue to creep up, helped in part by special disaster-related fundraising initiatives such as the substantial amount generated for the United Way Hurricane Response and Recovery Fund.²

Categories of United Way fundraising	2004-2005 (in \$ millions)	2005-2006 (in \$ millions)	2006-2007 (in \$ millions)	Percentage change 2004/2005–2006/2007
Annual campaign	3,610	3,635	\$3,690	2.2
Government grants	134	151	\$161	20.1
Giving to initiatives	83	102	\$107	28.9
Major/planned/endowment gifts	62	83	\$106	71.0
Corporate Sponsorships	4.3	6	\$7.4	72.9
Total aggregate fundraising totals	3,893	3,977	\$4,071	4.6

But aggregate national increases do not necessarily translate into significant resources for local UWs to take on the “root causes” of social problems. This is where the critics weigh in on the lacuna between the United Way’s root cause—problem-solving rhetoric and the reality of how much money affiliates have at their disposal. Despite its vanguard role in the United Way community impact strategy rollout, Cincinnati’s fundraising total has decreased 5.3 percent since 2003, and that of Rockford, Illinois, has dropped 19.2 percent in its most recent campaign, keeping it below its 2003 total. It is difficult to live

Declining United Way Locations	2004 campaign total (in \$ millions)	2005 (in \$ millions)	2006 (in \$ millions)	Percentage change 2004–2006
Baltimore	43.2	42.2	42.0	-2.8
Birmingham, AL	33.7	36.6	35.6	-5.6
Buffalo	17.5	16.6	17.0	-2.9
Cleveland	47.9	44.7	44.7	-6.7
Cincinnati	63.2	64.2	63.8	-0.9
Detroit	69.6	69.3	66.3	-4.7
Memphis	29.3	30.5	27.1	-7.5
Newark, NJ	8.6	9.0	7.4	-14.0
Pittsburgh	29.2	29.4	28.7	-1.7
Rochester, NY	39.2	39.3	38.0	-3.1
Rockford, IL	5.2	6.3	5.1	-1.9
Springfield, MA	6.3	7.0	6.1	-3.2
Worcester, MA	6.6	6.5	5.8	-12.1

up to the language of making a major impact on community problems in the face of multiple years of United Way fundraising difficulties, leading the occasional United Way such as that in Corvallis, Oregon, to overpromise and under-deliver on grants to nonprofits.³ The numbers are not necessarily large enough to bring about major community impact in troubled cities and metro areas, and in some very troubled places the numbers have not increased:

This past year, the national board of the United Way met in Little Rock Arkansas, vigorously touting its Community Impact Agenda. But even the host UW in Little Rock had a 2006–2007 campaign that was down 2.5 percent to \$4.8 million, though that is 6.5 percent above its 2003 number. After taking out a healthy chunk for administration and fundraising, plus the costs of conducting the needs assessments and other studies that come with the Community Impact Agenda strategies, UWs have not accrued the kind of big dollar amounts to match the size of the problems that these communities face.

While areas such as Buffalo, Cleveland, and Memphis are economies in decline, in some cities, particularly in the South and Southwest, booming economies have translated into robust United Way campaign results.

Growing United Way Locations	2004 Campaign Total (in \$ millions)	2005 (in \$ millions)	2006 (in \$ millions)	Percentage Change 2004–2006
Atlanta	74.4	97.7	104.4	40.3
Dallas	47.3	52.1	56.4	18.8
Denver	28.1	28.2	34.7	23.5
Miami	49.8	52.0	58.1	16.7
Seattle	103.9	98.7	123.7	19.1
Houston	69.8	82.7	81.7	17.0
Albuquerque	15.7	19.1	21.4	36.3

1. Statistics in the fundraising charts drawn from United Way of America and other sources: “Donations Reported by 432 United Ways for 2003–2004,” the Chronicle of Philanthropy, October 14, 2004; “Donations Reported by 429 United Ways for 2002–2003,” the Chronicle of Philanthropy, October 2, 2003; “Donations Reported by 426 United Ways for 2005–2006,” the Chronicle of Philanthropy, September 14, 2006; United Way: America’s Largest Charity: A Snapshot of Resources Raised for 2005–2006 (United Way of America, September 11, 2006); United Way: America’s Number 1 Charity: A Snapshot of Resources Raised for 2004–2005 (United Way, October 5, 2005); 2001–2002 United Way Resources Backgrounder (United Way, August 2002); an e-mail communication from Margaux Bergen, vice president, United Way of America, October 11, 2007, supplying an Excel spreadsheet of United Way fundraising for 463 United Way chapters; and e-mail communications from Sheila Consaul, director, Media and Public Relations, United Way of America, to Andrew Crosby, editor of the Nonprofit Quarterly, supplying a PowerPoint describing United Way campaign trends and components between 1994 and 2004 (March 7, 2007) and an Excel spreadsheet on national fundraising totals for 2003–2005 (March 8, 2007).

2. For example, more than \$28 million of the 2005 campaign total appears to have been raised specifically for the United Way’s special national fund established for hurricane relief. For information on the United Way’s special Hurricane Response and Recovery Fund, see 2005 United Way Hurricane Response & Recovery Fund Preliminary Report, August 15, 2006, also United Way of America 2005 Hurricane Response & Recovery Fund Report, December 2006.

3. Bennett Hall, “Benton County Chapter Strides to Pay Overdue Grants,” Corvallis Gazette-Times, July 7, 2007.

and Company, Wellpoint, and the Indiana Pacers to reach its campaign fundraising target.³³ In other campaigns, corporate philanthropic donations have helped the thermometer burst through the top. In other localities, the United Way campaigns increasingly depend on corporate commitments to match workplace gifts,³⁴ augmenting the leverage of corporations in the United Way system.

But there may be a quid pro quo involved. According to Alex Sanchez, a senior vice president of the United Way of America, the “push” for the strategy emanated from corporate donors, a reflection in part of their interest in supporting activities that can be measured.³⁵ But then the question becomes, will corporation donors support Community Impact Agenda “solutions” that target problems connected to or even caused by corporate policies and practices? There is plenty of history within the United Way system reflecting corporate rather than community priorities, including rejection of nonprofits advocating living-wage agreements (pre-Hurricane Katrina in New Orleans) and environmental justice (in Durham, North Carolina).³⁶

If it wants to show that the Community Impact Agenda isn’t subservient to corporate interests, the United Way has taken a smart step by stuffing its national board with some well-known social-justice advocates, including Raul Yzaguirre, the former president and CEO of the National Council of La Raza; Joe Solomonese, the president of the Human Rights Campaign; Manuel Mirabel of the National Puerto Rican Coalition; Dr. Johnnetta Cole, recently retired president of Bennett College in Greensboro, North Carolina; Philip Baldwin, president and CEO of the Southern Bancorp development banks; and actor George Clooney.³⁷

Are they corporate critics? Many of these board members’ organizations have benefited from substantial corporate contributions from some of the

most socially and politically retrograde corporations in the nation. Nonetheless, if there is substance behind the language of the Community Impact Agenda, it may be up to these United Way trustees of high repute to keep the system honest.

The United Way’s Community Impact Agenda challenge to the corporate sector is not like a local nonprofit’s decision to accept or reject a donation from the local Wal-Mart or Target store. The United Way has long made its bed with the corporate sector, placing workplace campaigns in as many corporate workplaces, typically larger ones, as possible where it could solicit multitudes of potential donors. But as the number of corporate campaigns declines (or as the number of corporations deciding that they don’t need an intermediary to raise money for them increases),³⁸ the United Way has turned to, among other strategies, direct corporate giving in order to maintain its \$4 billion foothold.

According to the latest numbers from UWA, direct corporate grants account for more than one-fifth of the revenues of local United Ways.³⁹ Nationally, between 2003 and 2006, the value of corporate “sponsorships” in the United Way system increased 91.7 percent, which is roughly the same rate of increase in one of the United Way’s other fast-growth areas: gifts to United Way endowment campaigns.⁴⁰

With the reality of changing employee demographics, UW cannot return to the well of workplace donors to maintain its revenue base. In the private sector, decreasing numbers of employers interested in federation-run workplace fundraising campaigns, increasing numbers of lower wage, nonunionized jobs, a shifting demographic that will be a majority minority by 2050, as much as one-third of the workforce employed in nontraditional jobs,⁴¹ and a majority of private-sector employees with inadequate or no health-insurance coverage add up to trends that compel the United Way to think

beyond payroll deductions in the private sector. But payroll deduction donations in public-sector workplaces also highlight the United Way’s fundraising challenge in its traditional mechanism.

There is probably little that the United Way can do about the attrition of workplace donors. Workplace-giving funds that address more specific interest areas of changing employee demographics have shown growth, capturing niches of employee interest that the United Way’s more generic charitable efforts may not,⁴² but that doesn’t mean that the universe of “traditional” workplace donors (who give less than \$1,000 a year through payroll deductions) is growing. It’s not.

In the words of one nonprofit consultant and former United Way employee, these new strategies are a response to having “felt the heat of [the United Way’s] loss of its corporate base.”⁴³ According to another consultant, corporate moves from the city to the suburbs have meant that “more and more corporations [that have relocated] to the suburbs and exurbs . . . wish to see their federated fundraising benefit their home communities. The new . . . United Way has an ever-smaller pot for the city.”⁴⁴ Some of this is simply due to corporations moving out of communities, some of it comes from corporations’ deciding that they and their employees don’t need the United Way’s intermediation. To replace inevitably declining workplace revenues, the United Way system has to find alternatives by tapping institutional donors to replace workplace donors.

Retrofitting Encino Man

Despite its high-profile leadership, massive marketing investment, and valued brand name (and despite the depredations of the likes of Aramony, Suer, and others), is the United Way a \$4 billion charitable fossil? Some believe that it is. One observer suggests that the United Way “may well be obsolete in 10

years.” Or, on the other hand, will these new community impact strategies reinvent and revive the United Way, like digging up a prehistoric Brendan Fraser in *Encino Man*, who with his new clothing and habits is transformed from caveman to Valley high-school teenager? Is the United Way on the cusp of rebirth, or is it in the death throes?

Several themes emerge from press coverage and *Nonprofit Quarterly* reader comments, including the following.

It's all about expanding the United Way's control and discretion. The United Way has been choking on the increasing propensity of donors to designate which nonprofits—inside and outside the UW family—should get the funds. For many, the Community Impact Agenda strives to make the United Way less of a charitable funding conduit to other charities and more of a decision maker concerning who gets what. In one reader's words, the United Way runs fundraising campaigns where it does its best *not* to tell potential donors that they can designate contributions such that the organization has been “disappointed that the percentage of gifts to the general fund has not increased, and they report it as if they've had a poor campaign and desperately need more money, even though their overall totals continue to increase.”⁴⁵

According to reports, in other localities the United Way has quietly chosen not to honor some donor-designated gifts, has subtracted donor designations from United Way general-pool distributions to specific charities, has provided confusing information about designated gifts, and has put a larger proportional administrative load on designated contributions rather than undesignated ones. One observer provides this telling example:⁴⁶

Last year we got a letter from them that, since the nonprofits they reckoned to be most important weren't getting the elected dollars they

thought necessary, the following years rules would allow them to route 25 percent of the donations to those nonprofits regardless of the donors' wishes. . . . Don't get me wrong, the nonprofits UW wants supported do good work and are worthy of support, they are just not the ones we want to support. We contacted UW and said if they changed the rules this way, we would stop giving regardless of the pressures from an employer to meet the annual goals (and that's a whole 'nother story). Apparently we weren't the only ones; they dropped the idea, although I'm sure they'll try and resurrect it sometime in the future.

The Community Impact Agenda appears to be part of a marketing approach to make undesignated donor gifts more attractive. The message is this: Give to the Community Impact Agenda, and you'll help solve critical community issues identified by your peers. If, on the other hand, you designate your contribution, you risk putting your charity toward issues and groups that may not maximize impact, generate leverage, and achieve positive community outcomes.

Reported feedback on the United Way of Central Carolinas in Charlotte-Mecklenburg paints exactly this picture: a United Way campaign that fell short of its fundraising target, a 3 percent growth in designated contributions accounting for roughly one-third of all contributions, and the very clear statement by the head of the United Way's Community Impact Agenda committee that each designated dollar “reduces the ability of the United Way to direct dollars to those agencies that are having the greatest impact in the community.”⁴⁷ Throughout the nation, these proportions and the UW's reaction are not atypical.⁴⁸

In 2003, the Community Impact Agenda strategy promulgated by the United Way of New York City made the case for shifting designations from spe-

cific agencies to one of five United Way “action areas”—(1) hunger and homelessness, (2) education and early-childhood development, (3) access to health care, (4) workforce development, (5) and “sustaining the health of the nonprofit sector”—each with an accompanying three- to five-year implementation strategy and measurable outcomes.⁴⁹ It is a powerful alternative aimed at donor designations. Again the message is this: Rather than giving to one organization, give to a potent, coherent strategy that targets the concerns that you, the donor, want to affect.

It's risky to speak up and criticize the United Way. Even hard-core United Way critics are reluctant to go public with concerns about the organization. Not-for-attribution comments contributed by *Nonprofit Quarterly* readers convey more than reluctance and, in fact, an omerta based on fear of consequences.

- “I get a strong sense from many people of being very, very reluctant to say anything critical, even if they think they're not getting a fair shake from the UW, because of the rock-the-boat syndrome.”⁵⁰
- “I definitely hesitate to go on the record about our experience due to the possible long-term consequences of talking bad about the United Way.”⁵¹
- “I want to be careful about what I say, as it could negatively impact” fundraising.”⁵²

The grumbling seems rarely to reach the stage of public outcry, much less organized action on the part of disaffected populations. In central Maryland, a rare example of successful opposition made its way into the press, where in response to fear that the new strategy would deprive safety net-type charities that serve the poorest of the poor, the United Way conceded to the creation of a “partnership board” to advise on allocations in the city of Baltimore.⁵³

The United Way as a foundation. Were it not for the occasionally extensive community research and outreach,

Workplace Giving Trends in the Combined Federal Campaign

If, as the Rochester United Way (UW) and other chapters have discovered, the future of workplace fundraising lies in public-sector rather than private-sector employees, the future prospects pose challenges. The nearly ubiquitous workplace fundraising mechanism in the public sector is the Combined Federal Campaign (CFC), but despite the generosity of workplace givers, participation rates of federal employees through payroll deduction have declined precipitously, from 47.9 percent of solicited federal employees in 1993 to 33.9 percent of employees in 2003 to 31 percent in the most recent campaign results. The proportion of CFC donors using payroll deduction has dropped from a high of 77.9 percent in 2000 to 74.8 percent in 2003, steadily drifting downward to 72.9 percent in 2006. As the chart below demonstrates, CFC survives on the generosity of public-spirited donors who increasingly are not using the United Way mechanism of payroll deduction:¹

CFC year	Employees solicited (in millions)	Number of employees donating (in millions) and participation rate (percentage of solicited employees)	Donors using payroll deduction (in millions)	Percentage of donors using payroll deduction	Percentage change in payroll deduction donors from previous year
2006	3.87	1.21 (31.2%)	.88	72.9	-4.1
2005	3.90	1.25 (32.0%)	.92	73.6	-3.9
2004	3.98	1.29 (32.5%)	.95	74.0	-4.9
2003	3.96	1.34 (33.9%)	1.00	74.7	-2.0
2002	3.81	1.35 (35.5%)	1.02	75.7	n/a

While these CFC numbers don't reflect directly on the United Way, they are emblematic of the UW's own challenge in workplace philanthropy.²

¹ Combined Federal Campaign statistics extracted from documents on the CFC Web site at the U.S. Office of Personnel Management (<http://fehb.opm.gov/cfc/index.asp>) and from OPM responses to inquiries from the author, specifically for data on the 2004, 2005, and 2006 CFC campaign totals.

² United Way affiliates have long been influential in the Combined Federal Campaign as principal combined fund organizations that manage local CFC campaigns.

UW's new strategy could easily be that of a major foundation. Like the United Way, many top foundations such as the Rockefeller Foundation, the Public Welfare Foundation, and others have decided to emphasize impact and outcomes. And to do so, they have concentrated their grantmaking—fewer, larger grants in a smaller number of targeted areas. Why should things be different at the \$4 billion United Way foundation? The Community Impact Agenda reflects not simply the United Way's thinking,

but the au courant grantmaking dynamic of U.S. philanthropy. To critics, the Community Impact Agenda feels and sounds suspiciously similar to the phenomenon of foundation-run "initiatives," particularly the so-called comprehensive community initiatives, or CCIs, that some foundations tout as community-based, grassroots-up efforts like the United Way's new programs. In the field, however, CCIs are often experienced as top-down, foundation-controlled scripts in which nonprofits

audition for dictated roles. To some critics, this is simply the United Way system doing its version of foundation-funded CCIs with distinctive United Way spin.

The United Way as an operating foundation. To the extent that the Community Impact Agenda is a "new" model, there is substantial sentiment that the United Way is increasingly doing its own strategic analysis for localities' charitable and philanthropic communities and, like foundations such as the Pew Charitable Trusts and the Annie E. Casey Foundation, beginning to accrete gradually into running programs and services directly under the UW banner. United Way chapters now develop and run programs such as child-care licensing and certification, affordable housing, and other areas of endeavor.⁵⁴

Fundraising intermediaries with strong programmatic emphases sometimes evolve in this direction, discovering (or believing they have discovered) that they can do better than the on-the-ground nonprofits on whose behalf they raise money. But as this expert observes, this shift raises questions about "how much they distribute versus [how much they] retain. . . . More and more, [they are] 'providing services,' and it is questionable what they do, how effective it is, and whether other groups are better equipped to do that."⁵⁵ Critics of the United Way have frequently suggested that one dimension of the Community Impact Agenda strategy is a focus on more in-house planning and data collection by the United Way, leading to the retention of a larger portion of funds, though with funds designated for "programs" rather than "fundraising" or "administrative" needs.

As the United Way's strategy increases its posture as designer and implementer rather than funder of community strategies, UW becomes a more attractive venue for foundation and government grants keyed to the United Way's focus areas. For example, Cincinnati's United Way landed a \$3 million

Department of Education grant to teach parents how to be involved in their children's education.⁵⁶ In Texas, the United Ways of Texas (an umbrella organization representing multiple chapters) got the attention of the Bill and Melinda Gates Foundation for a \$350,000 grant aimed at improving high-school graduation rates.⁵⁷ As part of the United Way's new national initiative known as the "Financial Stability Partnership," Bank of America put in a half-million dollars toward the United Way's efforts to expand the Earned Income Tax Credit,⁵⁸ a component of several of the local UW impact strategies as well.

Many foundations typically contribute significant sums to United Way chapters as a matter of course, the Gates Foundation especially as a seven-figure donor to United Way chapters in the Pacific Northwest, for example.⁵⁹ The impact strategy potentially elevates the United Way onto the radar screens of foundation grantmakers looking for effective, outcome-oriented nonprofits as more than financial pass-throughs.

Broad-brush condemnations of 1,300 UW organizations are a discredit to the good intentions and work of thousands of United Way employees who for years have raised and deployed charitable resources and who help maintain the tatters of a social-safety net for those in need.

If you're lucky to be in an area of high-quality United Way leadership committed to the health of the local nonprofit sector, this new strategy might reflect what the community and the nonprofit sector want and believe as well. In one community, the head of a United Way funded agency wrote, "There has certainly been some anxiety among my member agency peers—much of it our natural human response to any change or perceived threat, [but] our United Way leadership has bent over backwards to keep us in the loop and to listen to our perspectives," ultimately devising transition strategies for adversely affected groups.⁶⁰ This per-

spective, however, reflects a local United Way culture constructed on extensive outreach to and interaction with agency staff and board members. To what extent does the new strategy, borne of local innovation, allow local UW voices and strategies to filter back up to inform and maintain a system that is agile and able to adapt to change?

Heartfelt commentary from those who believe in the strengths of the UW's new approach should be taken as reminders of the commitment and resilience of nonprofit service providers, such as this from a former UW employee:⁶¹

I am biased. This United Way is and always will be an important organization in my life. It is an excellent, cutting-edge United Way that is struggling to balance the needs of the nonprofit organizations with [which] it has partnered for over 40 years with the needs of the community as a whole. Throughout the process, it has continually asked for input and assistance from the organizations it has funded, and has openly and frequently communicated the work that was under way and the changes planned. . . . I do not doubt for a minute that it is difficult and frustrating to see revenues decrease from any source on which an organization once relied, be it state or federal funding, United Way, or a long-time donor. However, the challenges nonprofits face in maintaining services while shouldering continued decreases in funding from all arenas, including United Way, too often deteriorate into stories of angry executive directors and board members accusing United Way of irresponsibly "cutting" their funding, seemingly without thought or concern.

But the critics are not just a bunch of disaffected nonprofit directors ruing the loss of their United Way financial sinecures. In other communities, the United Way culture has been defensive

and guarded, with reports that the Community Impact Agenda strategy has resulted in a rejection of the United Way's largesse and even a departure from the UW fold on the part of some nonprofits.

In contrast with its more traditional and conservative historical role, will the new United Way Community Impact Agenda reinvent the United Way as a newly influential, progressive fundraising intermediary? In many communities, despite issuing reams of PR to articulate the new strategy, the United Way has not effectively explained what it is doing. For many, UW has failed to convince people that the new strategy is more than posturing, another United Way tactic to appear new and different and effective. Some organizations are winners in the changing funding distributions, some are losers, but for many the United Way's Community Impact Agenda adds up to a surfeit of United Way institution building and a deficit of significant social change.

ENDNOTES

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12. Among the United Way's PR mainstays is Edelman a public relations firm powerhouse that has represented some of the nation's largest corporations, notably Wal-Mart. Over the past two decades of Republi-

can dominance, Edelman has successfully worked Capitol Hill. The firm has smartly diversified the political intent of its leadership recently, recruiting both archconservative Tony Blankley, former aide to Newt Gingrich and editor of the *Washington Times*, as an executive VP, and former Democratic congressman from Connecticut, Toby Moffett, as a "strategic counselor," for example.

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37. The United Way has historically had national union representation on its national board, including currently Barbara Easterling of the Communications Workers of America and Linda Chavez-Thompson, the retiring executive vice president of the AFL-CIO. The union movement has benefited from the United Way system, including through a network of United Way-paid staff at local central labor councils (CLCs), including "community-service liaisons," and United Way support for CLC-managed nonprofit service "labor agencies." There is a story to tell about organized labor's strategy within the United Way system, but that is beyond the scope of this article.

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Research for this story surfaced many comments from United Way staff and partners. What about your experience with UW? Let us know at feedback@npqmag.org. Reprints of this article may be ordered from <http://store.nonprofitquarterly.org>, using code 140407.