

ADVANCING EDUCATION  
INCOME AND HEALTH

# BUSINESS PERFORMANCE OVERVIEW

2015 REPORT

United Way of Greater Lorain  
County

This report and the index values contained in it are not for public distribution.

**GIVE. ADVOCATE. VOLUNTEER.**

[UnitedWay.org](http://UnitedWay.org)



# PERFORMANCE DASHBOARD

Powered by Business Performance Index Practices



Prev Yr Segment: 3C	BPM Segment: 3C	LOCAL			NETWORK		
		Prev Yr	Curr Yr	Change	Prev Yr	Curr Yr	Change
<b>OVERALL BUSINESS PERFORMANCE*</b>							
Business Performance Index (0-100)		97.4	92.8	-4.7	49.0	47.6	-1.4
<b>IMPACT**</b>							
Documented results for priority populations in Education, Income and/or Health		Yes	Yes	No change	25%	25%	+.2% pts
<b>SUPPORTERS***</b>							
Donors		6,106	5,110	-16.3%	8.72M	8.35M	-4.3%
Advocates****		123	175	-	223,991	170,383	-23.9%
Volunteers		655	744	+13.6%	2.53M	2.62M	+3.2%
<b>REVENUE***</b>							
Current Year Support (CYS)		2,853,799	2,645,381	-7.3%	\$3.939B	\$3.891B	-1.2%
Resources Under Mgmt (RUM)		2,467,897	2,220,142	-10%	\$2.968B	\$2.921B	-0.2%
RUM as % of CYS		86.5%	83.9%	-2.6 % pts	75.4%	75.1%	-.3 % pts
<b>Public TRUST*****</b>							
% of US adults who trust United Way to accomplish what it says it will do					68%	64%	-4 % pts

Source: United Way Research  
Percentage and percentage point changes may not sum due to rounding.

\* Most of the BPI (which determines the segment letter A, B or C) is reported via the Community Impact Practices Survey, while 10% comes from the Database 2 Survey. The segment number is most accurate when Database 1 and Human Capital survey information is up-to-date. The content of the BPI sometimes undergoes slight changes from year to year. When these changes were removed and exactly the same indices were compared year over year, the network BPI increases by 1 point.

\*\* As reported via the Community Impact Practices Survey. Current year reflects the data reported in 2015, whereas previous year indicates data reported in 2014.

\*\*\* As reported via the Database 2 Survey. Current year reflects the data reported in 2015 about the 2014-2015 campaign year, whereas previous year indicates it was data reported in 2014 about the 2013-2014 campaign year.

\*\*\*\* Advocacy categories/definitions were expanded two years ago to cover a broader range of activities from building community awareness of a key issue to engaging public officials in policy change. The expanded categories for advocacy include: grassroots advocates who sign advocacy letters/petitions or make a phone call, in-person advocates who visit policy makers or attend

public meetings, traditional media advocates who write op-eds/letter to media outlets, social media advocates who directly address policy makers or share calls to action, and advocacy committee members.

\*\*\*\*\* As reported via Brand Tracker or United Way Worldwide-approved local assessment. Current year reflects any poll conducted in 2014, whereas previous year indicates it was executed in 2013. In some cases, United Ways have completed a Brand Tracker in 2015. In this case, current year represents 2015 data, and previous year reflects 2014.

#### Other definitions:

Resources Under Management: Current Year support minus UW2 (gifts designated to agencies).

Current Year Support: Total contributions to United Way, including UW1 (discretionary contributions), UW2 (gifts designated to agencies), government grants, gifts to initiatives, outright gifts to endowment, bequests and other planned gifts, corporate sponsorship and other major contributions.

# BUSINESS PERFORMANCE INDEX

Supporting the Achievement of Dashboard Results



United Way of Greater Lorain County (Lorain, OH)

Segment: 3C

Index: 92.8

Practice Areas/Practices that Comprise the Business Performance Index

	Weight (out of 100)	Index			% of Pts. Captured			
		Your United Way	Average for Segment 3	Network Avg	Your United Way	Average for Segment 3	Network Avg	
<b>Lead by Direction, Action and Communication</b>	<b>Focus on Priorities and Results</b>							
	Have Written Goals on Impact, Revenue, Supporters, Trust	2	2.0	1.5	1.4	100%	73%	69%
	CEO and Board Are Focused on Community Priorities	2	2.0	1.4	1.3	100%	72%	66%
	Board Shares/Advances Priorities, Progress and Results	2	2.0	1.3	1.3	100%	63%	64%
	CEO and Board Members Act to Strengthen United Way	2	2.0	1.4	1.2	100%	68%	59%
	<b>Publicly Commit to an Issue</b>							
	Publicly Commit to an Issue (with Partners)	5	5.0	3.6	3.1	100%	72%	63%
	<b>Strategically Communicate</b>							
	Raise Awareness about One or More Issues	1	1.0	0.9	0.8	100%	89%	83%
	Issue Call to Action on One or More Issues	1	1.0	0.7	0.6	100%	68%	61%
	Identify Key Messages to Explain United Way Value	1	1.0	0.5	0.4	100%	51%	41%
	Communicate Progress and Results Regularly	1	1.0	0.8	0.7	100%	77%	72%
	<b>Align and Integrate</b>							
	Align Functions to Support Impact Strategies	3	3.0	1.2	0.9	100%	39%	28%
	Tie Resources Under Management Directly to Impact Strategies	3	3.0	0.8	0.6	100%	26%	19%
	<b>Develop Talent</b>							
	Integrate Key Community Impact Skills/Competencies	3	3.0	1.6	1.4	100%	53%	47%
<b>Network Engagement</b>								
Foster Interdependence and Mutual Accountability	4	3.6	2.8	2.2	89%	70%	54%	
<b>Engage and Align with the Community</b>								
Listen to the Community and Use What is Learned	4	4.0	2.7	2.3	100%	66%	58%	
Share What Is Learned with the Community and Develop a Plan	4	4.0	2.6	2.2	100%	64%	54%	
<b>Deepen Relationships with Individuals, Organizations and Networks</b>								
Identify Interested Parties and Engage Them in Addressing One or More Community Priorities	3	3.0	2.0	1.6	100%	66%	53%	
Communicate and Engage Effectively	3	3.0	1.9	1.5	100%	62%	50%	
Build the Culture and Infrastructure for Managing Relationships	3	3.0	1.7	1.4	100%	56%	45%	
<b>Mobilize Resources</b>								
Execute the Fundamentals of Fundraising	3	3.0	2.2	2.0	100%	75%	66%	
Increase Non-designated Resources (Resources Under Management or RUM) ■	3	2.52	2.5	2.5	84%	83%	85%	
	2	0.0	1.0	1.1	0%	50%	55%	
Grow Revenue as a Share of Local Income Earned ■	3	0.68	1.2	1.0	23%	40%	32%	
	2	0.0	0.5	0.6	0%	25%	28%	
Engage on Advocacy Issues Tied to Priorities	2	2.0	0.9	0.7	100%	45%	37%	
Engage Volunteers Tied to Priorities	2	2.0	1.4	1.3	100%	69%	64%	
Frame Strategies as Engagement Opportunities	2	2.0	0.5	0.4	100%	27%	20%	
<b>Develop and Implement a Blend of Impact Strategies to Get Results</b>								
Create Impact through Programs	8	8.0	6.3	5.4	100%	79%	67%	
Create Impact through Community-level Change	8	8.0	4.3	3.1	100%	53%	39%	
Strategies Are Research-based and Grounded in Community	5	5.0	2.0	1.5	100%	41%	30%	
Ensure Community Impact Plan Is Comprehensive	5	5.0	1.7	1.3	100%	34%	25%	
Have Documented Results for Priority Population(s)	8	8.0	2.7	2.0	100%	34%	25%	
<b>TOTAL</b>		100	92.8	56.3	47.6			

■ Sourced from the Database 2 Survey. All other practices derive from the Community Impact Practices Survey, United Way Research. For more information on the Business Performance Matrix, see <https://online.unitedway.org/bpm>. To see this report for other United Ways, see <https://online.unitedway.org/bpo>.

# COMMUNITY IMPACT

Key Practices to Community Impact Progress



IMPACT PERFORMANCE PRACTICES	LOCAL			NETWORK			
	Prev Yr	Curr Yr	Change	Prev Yr	Curr Yr	Change*	
Select one or more of the community's priority issues for targeted action	Yes	Yes	No change	58%	62%	+2.2 % pts	
Public commitment to issues with partners in...	Education Community goal(s) publicly declared by United Way and its community partners	Community goal(s) publicly declared by United Way and its community partners	No change	48%	50%	+2.2 % pts	
	Income Community goal(s) publicly declared by United Way and its community partners	Community goal(s) publicly declared by United Way and its community partners	No change	35%	41%	+5.2 % pts	
	Health Community goal(s) publicly declared by United Way and its community partners	Community goal(s) publicly declared by United Way and its community partners	No change	35%	41%	-6.6 % pts	
Create impact through programs**	-	D	1st yr measured	-	53%	-	
Create impact through community-level change**	D	D	No change	32%	30%	-1.4 % pts	
Tie Resources Under Management directly to impact strategies	Yes	Yes	No change	27%	20%	-7.2 % pts	
Document results for the priority populations in...	Education	Yes	Yes	No change	23%	23%	No change
	Income	Yes	Yes	No change	18%	18%	-.6 % pts
	Health	No	Yes	Up	15%	16%	+1.3 % pts

\*Some percentage point changes do not add up due to rounding.

\*\*Measured on a scale from A to D, with D being the most far along. Network %'s are calculated based on those reporting a C, Between C and D or D. For a complete description, see Table IG2. and IG2.: [online.unitedway.org/CIPSTableQs](http://online.unitedway.org/CIPSTableQs). Program metric was created in 2014-15, so previous year's data is not available.

## TRACKING PROGRESS ON COMMUNITY GOALS

Specific measure or indicator	Prev Year	Prev Value	Curr Year	Curr Value
Percent of children demonstrating readiness for kindergarten				
Percent of middle-school students with improved educational, social and health outcomes.				
Percent of low-income households restored to financial stability.	FY 2014	65%	FY 2015	93%

Source: 2015 Community Impact Practices Survey, United Way Research.

# HOW TO USE YOUR REPORT



## **NEW** Customized Recommendations of Tools and Resources

**This year's Business Performance Overview is personalized for YOUR United Way!** The suggested tools and resources below are tied to the critical behaviors – drivers of impact, revenue, supporters and trust – in the Business Performance Index and will vary based on your responses to Database 2 and the Community Impact Practices Survey. Use this guide, organized by practice area, to pinpoint opportunities for growth, set goals and monitor progress. All links can be found on United Way Online (navigate to the recommendations by using <https://online.unitedway.org> plus the key word(s) listed to the right of each resource's name).

### Lead by Direction, Action and Communication

Organizational Scorecard Template	/scorecard
Diversity and Inclusion Toolkit	/ditoolkit
United Way Guide to Collaborations and Shared Services	/sharedservices

### Engagement Individuals, Organizations and the Community

Donor Retention Tools: A Collection	/donorretention
Churn Tool	/churn
Voices for the Common Good: San Diego Speaks Out on Education	/sandiegospeaksout
Harwood Community Conversation Workbook	/ccworkbook

### Develop and Implement a Blend of Impact Strategies to Get Results

Charting a Course for Change: Advancing Education, Income and Health through Collective Impact	/charting
Catalyzing Community Impact	/catalyzingci
Profiles in Community Impact Series	/cipprofiles
Program Outcome Measurement Toolkit	/pom

## More Tools and Resources for Business Performance

Access all of these tools and resources in one place – plus, find a brief description of each – by visiting <https://online.unitedway.org/bptools>. In addition, you'll find other recommendations that can strengthen your United Way's expertise in executing the critical behaviors that drive revenue and impact in your community.