



**United Way**  
**Peterborough & District**  
*Change starts here.*

## **FREQUENTLY ASKED QUESTIONS**

### **I've heard things are changing at United Way Peterborough. What's new?**

United Way Peterborough & District (UWP) has been engaged in a strategic planning process to align with United Way Canada's national mandate. The last 2 1/2 years has seen a progression from UWP's roots as simply being a fundraising organization to include the critical role of community convener as well. We are mobilizing community partners – including business, labour, community leaders, government and community residents – to create opportunity for a better life for everyone in the City and County of Peterborough. We are placing a greater emphasis on addressing the underlying causes of social problems, working to effect sustainable long-term changes.

This work is setting the stage for a very positive future for our region. We are proud and encouraged by the continued support from our volunteers, donors and all our stakeholders. Your understanding of our community needs and the importance of our work is inspiring and gratefully appreciated by the thousands of people who receive help.

The foundation for change lies in the comprehensive community consultation process with funded and non-funded agencies, the public, stakeholders, as well as researching over 150 reports on social trends and best practices in social policy. It has been a monumental undertaking that included over 200 online surveys and 300 face to face conversations that were conducted by looking through the lens of the social determinants of health.

Our process has included community discussion to ensure residents have an opportunity in helping to establish priorities that foster sustainable positive change. Through discussions with our agencies, on-going research and feedback from various stakeholders, we've put together a comprehensive approach to community development with a framework focused on two priority areas; moving people from poverty to possibility and creating healthy and strong communities.

### **Where will United Way be investing donor dollars?**

We are renewing our commitment to this community by developing a community investment strategy focusing on innovative solutions to critical challenges facing vulnerable populations in our community aligning to two main priority areas;

#### ***Moving People from Poverty to Possibility*** ***Building Healthy & Strong Communities***

Within the context of the City and County of Peterborough's demographics and social challenges, it was determined that there is a foundational focus on poverty as a connecting theme. The theme conveys hope, inspiration and possibility that create opportunities for a better life for everyone in our community.

#### **Moving People from Poverty to Possibility**

Poverty is the result of many factors and no single program can address them all. The new investment strategy is a holistic, long-term approach that tackles poverty on many fronts. Based on research and best practices, and validated through continuing work with community partners, we are confident this strategy will result in meaningful and measurable change for the better.

United Way is committed to:

- Investing in individuals experiencing poverty
- Investing in children and youth to prevent poverty
- Investing in individuals vulnerable to falling into poverty

Within these areas, United Way will move people from poverty to possibility by -

- Supporting people to get back on their feet by making sure they have access to the most basic needs in life – food security, emergency shelter and housing supports
- ensuring everyone realizes their own potential through education

through the following outcomes;

- People have access to safe, affordable, and nutritious food.
- People have improved housing stability.
- Seniors and individuals of working-age have the capacity to manage personal finances and build assets.
- Children & youth are able to achieve their education and training goals.
- Parents are supported to provide a nurturing environment for their children.
- People have the necessary skills to support personal and vocational success.
- Individuals of working-age are able to secure meaningful and fulfilling employment.

#### Building Strong, Healthy Communities

United Way is committed to supporting the overall well-being of individuals and families as vital components to building strong communities. Eliminating barriers and improving access to services allows people to contribute to community and develop a sense of belonging. Our focus includes connecting residents to a network of service, treatment, and support; ensuring all individuals and families are healthy and strong; and supporting the development of a caring and inclusive community where each resident has a voice and is a leader.

Within this area, United Way will build strong healthy communities by -

- creating a place where everyone has the opportunity to be fully involved in the economic, social and political life of our community

through the following outcomes;

- Older adults are able to remain in their homes longer.
- Individuals and families affected by mental illness or addiction receive treatment and support.
- Survivors of violence or trauma are supported to recover and rebuild their lives.
- People are supported to build a sense of belonging and improve well-being.

#### **Will two priority areas address all of the social issues affecting our community?**

United Way cannot address every social challenge facing our community but we do know there are several critical areas where we can effect real and positive change. By combining community engagement with priority-setting and collective action, we hope to achieve lasting, measurable change together.

To address these areas, United Way will focus efforts and investment on targeted priority goals to build a community investment model that moves beyond the traditional role of funder that is guided by 3 key practices of investment that we're calling the **AIM Model**;

1. **Advocacy**
2. **Investment**
3. **Mobilization**

#### **Why is United Way involved in policy and advocacy work?**

While the majority of our work is partnering with many organizations to address immediate needs and to get at the underlying cause of social issues to prevent them from happening in the first place, we have also learned that there are some barriers in municipal, provincial and federal social policy. By advocating change around these social policies, we can make a more significant impact in our community.

#### **Does United Way collaborate with other organizations?**

Yes, many. We know it takes many individuals and organizations working together to address complex social issues. United Way works across all sectors including business, community leaders, human service agencies, schools, labour, academia, government and community residents. Together with our collaborative partners, we promote awareness of key social issues in our community, maximize resources and find lasting solutions to these complex issues.

#### **How will existing United Way Peterborough agencies be affected by the new funding strategy?**

We are confident that with the generous support of our donors, staff and volunteers and with the dedication of our member agencies, our community focus will meet the social care needs of the City and County of Peterborough. We are committed to our donors to invest where we can have the greatest impact and deliver measurable results.

Our current member agencies actively participated and continue to participate in this process. They have been involved and informed in all areas of the strategic planning process since its inception. Their generous support is a true demonstration of a proud history of working together to create opportunities for a better life for individuals and families and makes our community a better place to live for everyone.

From the outset, our priority was to;

- Demonstrate respect for our member agencies and the work they do, honouring past and current relationships.
- Inform agencies of transition plans and timelines.
- Inform agencies of the issues and strategies identified by United Way.
- Ensure all agencies understand the changes and the potential impact on them.
- Engage agency leadership in determining community priorities.

All community agencies have the opportunity to apply for funding under this new strategy. Some current programs and organizations may not align with the newly developed funding strategy, or may receive less funding, but there could also be new programs and organizations that will align to the newly established priorities.

### **This change could cause stress for the current Member Agencies. How do you plan to help prepare them for that?**

Our current member agencies were informed of our plans more than 2 years ago and a significant contributor to the development of our new funding model during that time. To create as much stability as possible for our current member agencies, a budget was approved for both the 2012/2013 and 2013/2014 funding cycles that resulted in a deficit and required us to draw down on reserves in order to maintain the current level of funding. We recognize that this is both an exciting time of change, and potentially a time of uncertainty for our member agencies. We want to alleviate as much stress and uncertainty as possible and will be happy to provide transition funding if required on a case-by-case basis.

We have made every effort to provide as much planning time as possible to our current member agencies. We will continue as we have, to communicate with member agencies as a whole, and in addition, should it be of value, we are open to present at agency Board meetings. In fact, we committed to the following guiding principles as we moved through this change platform for our member agencies;

- We are committed to continuing our timely and transparent information sharing.
- We are continuing our commitment to multiple communication opportunities including one-on-one meetings.
- We are continuing our commitment to provide time to learn and adjust to change.
- We are continuing our commitment to look for new ways to work with agencies as strategies unfold.
- We are continuing our commitment to build on the experience and expertise in our community.

It is the first time in many years that we have endeavoured to identify a community set of priorities. We are excited by the demonstrated level of engagement as we move forward, and indeed by the leadership of our member agencies in helping us to define what is critical for our community.

### **Change is Daunting. Change is Essential. Why change at all?**

As our community evolves so must we evolve. In this case, changes with UWP's funding model have been initiated in order to enact a bigger change upon our community. We're the first to admit that change is intimidating but it is also revitalizing. We undertook an extensive two-and-a-half year process of assessing our funding model and seeing what the overall impact was compared to what it could be. We feel that we've done our due diligence with respect to community dialogue and program assessment. Now comes the time to put those ideas into action. We have little doubt that what we together are going to effect is a change for the better over the long term.

### **What's your process for deciding who qualifies for funding?**

In May of this year, we launched the first step in our funding process with an open call for Letters of Intent. That process generated 60 applications for a total of \$3 million worth of funding. What was striking throughout this process was the depth of commitment all applicants have towards the community and the clients they serve. And as much as we would love to be able to fully fund all applications, the reality is that our resources are much more limited.

To that end, the 60 applications were thoroughly reviewed by a panel of volunteers from across all sectors of business, government and NFPs. These experts brought to the process their expertise in finance, social services, accounting, public health, research, public policy, non-profit management, strategic planning, and community development. Each of them spent an average of 20 to 30 hours reviewing all of the applications and scoring each application individually.

They then came together with senior United Way staff and Board for 2 days to rank and build consensus on the best fit among those applications as they relate to the outcomes that were determined with the community and shared with the community throughout this process. Those recommendations were then brought to the Agency & Community Service Committee (ACSC) to review, amend and to recommend to the Board for approval or revision.

Throughout the process, we were committed to maintain a strategic framework as we assessed fit, capacity to deliver on an outcome, alignment with our collective community goals, and those best suited for long term partnership, or those demonstrating great capacity to deliver on truly innovative work.

## **If you received requests for over \$3 million, some agencies won't receive funding. How do you decide who receives funding and who may not?**

The changes we're establishing don't just affect the way we operate. They will also affect a number of agencies who may not qualify for funding under our new model. The decisions made are not easy but they are essential to move forward. There are effectively three main reasons why certain agencies will not receive funding in this cycle. One, only those agencies most strongly aligned to the Community Impact measures (outcomes outlined above) were able to receive funding given the limited resources available. Two, concerns around an agency's reserve funds. And three, only those organizations best able to meet our requirements around measuring and tracking the results received funding.

We welcome all currently funded agencies to stay part of the United Way family and encourage them to apply for Innovation and/or Neighbourhood Funding in the new year. We will also continue to work with these agencies as a partner in advocacy and collective mobilization under our new AIM model (outlined above). This reflects a broader and more collaborative approach to our efforts.

## **What steps are being taken to assist agencies that won't receive funding?**

As mentioned earlier, arriving at our new funding model has been the result of over two years of consultation. That process has directly involved all agencies connected to United Way Peterborough as it has always been our priority to treat organizations with the respect that defines our long term relationships. During that time we have been transparent in our strategic intentions, alerted agencies of the potential impact of these decisions and allowed them to prepare accordingly for any transition. We will continue to maintain working relationships with these agencies to ensure that transition is as smooth and manageable as possible including transitional funding for those that qualify.

## **How does this affect new funded agencies?**

Our intent is to be focused in our funding and to fund deeply over time. Our belief is this approach has the best chance of realizing impact in our community. Our new funding model features three distinct funding streams;

- Long Term Fund: this is core funding over 3 to 5 years (75% of community investment dollars)
- Innovation Fund: shorter term funding over 1 to 2 years (20% of community investment dollars)
- Neighbourhood Fund: short term local funding (5% of community investment dollars)

## **Why should I donate to United Way Peterborough & District?**

For more than 70 years, United Way has been defining and funding the most pressing and emerging needs in this community representing one of the most extensive collaborative approaches to create lasting change. It is the most effective and efficient way to advance the common good. When you invest in your community through United Way, you can trust that your dollars are being strategically invested where they are needed most.

United Way brings together all areas of community – business, government, academia, labour and others – to address social issues at the root cause and develop effective, long-term strategies to solve them.

United Way's Community Investments and Collaborations Team have always added tremendous value to your donation. They develop a highly targeted investment strategy based on in-depth knowledge of social issues, extensive research, awareness of community need and an ability to identify, address and alleviate existing gaps.

Using a newly defined funding strategy, we will measure outcomes in our investment areas and report these back to donors. We have rigorous standards of excellence for performance and report outcomes annually.

Our new funding strategy will bring even more lasting value to agency partners. We will make multi-year funding commitments, collectively design long-term strategies for program delivery and share research. We will also provide capacity-building opportunities that improve governance and administration practices.

## **Do funds raised by United Way Peterborough & District stay in the community?**

Your investment goes far, but not far away! Unless directed by the donor to another United Way or registered charity, all donations stay right here in the City and County of Peterborough to help address the key social issues identified by our community.

## **How much of my donation does UWP use for fundraising and administration costs?**

Fundraising and administration costs for 2013 were 19.3 per cent of the total funds raised. This is among the lowest costs of fundraising for registered charities in Canada. By comparison, the Canada Revenue Agency (CRA) considers 35 per cent to be an acceptable standard. Our 2014 annual campaign costs are expected to be in the similar range. As a registered Canadian charity, United Way is obliged to file a T3010 report with CRA annually, detailing all of its fundraising, administration, executive compensation and other costs.

The latest CRA T3010 data can be found at [www.cra-arc.gc.ca](http://www.cra-arc.gc.ca). Every dollar donated and every dollar spent is accounted for in our independently audited financial statements contained in our annual report.

### **How much money did United Way raise last year? Where does the funding come from?**

UWP raised more than \$2.3 million in the 2013 campaign. Funding came from generous individuals in the community and workplace employees, corporate donations, and other sources including events.

### **How can I get involved in the exciting work of United Way?**

Are you passionate about Peterborough? Do you want to help drive our impact agenda in the community and create meaningful change in the lives of individuals and families? Getting involved is easy and rewarding! In fact, you'll be joining about a thousand other volunteers (and even more donors) who feel the same way. We have a number of ways you can get involved, including hosting a workplace campaign, volunteer opportunities, events, special initiatives and more.

**Call or visit our website for more info. Thank you!**

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