*Reflects key accomplishments, for full plan, see 2018 Strategic Work Plan and Policy Priorities.*

UWNYS has a robust strategic plan that focuses on Four Things:

Public Policy & Advocacy that benefits all our members

Resource Development and Management

Management of Statewide Initiatives, such as ALICE and 211

Network Engagement- bringing together our members to strengthen our

overall brand and position as a network in NY

# Key Goal #1 - Public Policy and Advocacy

With the oversight and participation of the Public Policy Committee, engage in lobbying and advocacy efforts that ensure the New York’s United Ways speak with one voice on identified issues of importance and build relationships with public officials and policy makers.

1. Surveyed the membership to determine priority policy areas for 2019. These included:
2. 2-1-1 Funding/ Access to Health and Human Services,
3. ESPRI Program
4. Economic Security,
5. School Readiness and Success
6. Charitable Sector Issues
7. Worked with the UWNYS Public Policy Committee and engaged our advocacy advisors at Hinman Straub to develop the issue briefs and talking points around each identified priority
8. Provided direction and information to contracted lobbyists to focus their efforts on outcomes important to the network.
9. Provided advocacy alerts and guidance to the United Way and 2-1-1 networks as appropriate to engage them in advocating with their local legislators
10. Provided information and periodic updates to member United Ways about lobbying and advocacy goals, strategies, activities, bill and budget summaries, opportunities and threats. Includes weekly Plugged In state advocacy newsletter and regular Advocacy Alerts.
11. Provided testimony:
12. Budget testimony
13. SNAP testimony
14. DSRIP 2.0 comments
15. 2-1-1 response to the opioid crisis testimony to the Joint Senate Task Force on Opioids, Addiction and Prevention and to the Assembly Standing Committee on Alcoholism and Drug Abuse
16. Sign-on letters *-* UWNYS signed on to letters surround after school program funding, preservation of SNAP benefits, expansion of EITC and VITA, the need to focus on childhood poverty and others. For 2020 we will devise a tracking mechanism for sign on letters.
17. Advocated with key state level policy makers (Governor’s staff, Division of the Budget, relevant state agencies, Office of the Attorney General, Office of the State Comptroller, state legislators and legislative staff) about the policy priorities.
18. 2-1-1 Day – 2/11: included a morning workshop for Legislators and their staff and followed with 3 meetings with legislators, the Governor’s Office and legislative fiscal/program committee staff
19. ALICE Lobby Day 5/30: nineteen meetings with Assembly Members, Senators and/or their staff, press conference to promote a packet of bills to support tax credits for working families
20. 2-1-1 Lobby Day 9/18: meetings with OTDA, DOB, DHSES, DOH, OMH, CCF, legislative fiscal and program committee staff
21. 2-1-1 Funding: Achieved legislative add of $1.25M in the state budget for funding of 211 across the state. Have positioned 2-1-1 for continued and increased investment in 2020.
22. ESPRI: Advocated for funding in 2019 budget, $4.5M was included. Advocating for $5m minimum for United Way lead ESPRIs in 2020 budget.
23. Advocate for working family tax credits, specifically EITC and CTC.
24. Expansion of Earned Income Tax and Child Tax Credits advocacy continues at the state and federal level.
25. Concentrated efforts are occurring in partnership with Schuyler Center for Analysis and Advocacy, Fiscal Policy Institute and Children’s Agenda.
26. Numerous meetings have been held with Division of Budget, Senate Finance, Assembly Ways and Means.
27. Joined UWW for Federal Advocacy in June-August on:
28. EITC/CTC expansion, for which work continues
29. VITA permanence and funding, for which VITA was made permanent!
30. Establishment of a Universal Charitable Tax Deduction. As a result of the 2017 tax policy and the increase in standard deduction, New York stands to lose $961M in charitable gifts. Significant outreach, meetings, letters and calls are made to encourage NY delegates to cosign a bill for a Universal Charitable Deduction that will mitigate this loss to LUWs and other charities. Staff made progress with Senator Schumer and Congressman Suozzi. Congresswoman Stefanik is already a cosponsor. Advocating for new bill in the 2020 session.
31. Joined Raising NY, a collaborative group focused on advocacy for early childhood funding and issues in New York State. UW Buffalo and UW NYC are founding members.
32. Engaged with Census 2020 leaders and advocated for release of the $20m set aside in the 2019/20 budget for full-count activities. Provided information and guidance to the United Way and 2-1-1 networks encouraging their engagement in local full count committees

# Key Goal #2 - Resource Development and Management

Goal is to maximize the revenue generation efforts of UWNYS and its member United Ways through a combination of grant seeking and other proven resource development strategies.

1. Identified and develop relationships with prospective funders (government, corporate and philanthropic) that support both local United Way and UWNYS priorities and apply for available appropriate grants.
2. Progress was made with the addition of State Agency Lobbying efforts
   1. Proposal to DOH for ALICE/2-1-1 Counts mapping project
   2. Proposal (unsuccessful) to DOH for statewide ALICE support
   3. Submitted concept paper to DOH for the creation of a single 2-1-1 data base of services that would support to local PPS’s and provide the information they need to achieve their goals around social determinants of health
3. Notified the network of a state level funding opportunity for Volunteer Service; two LUWs were awarded funding as a result.
4. Invested in subscription to Grant Station Insider to identify grants to UWNYS and member work.
5. Sent monthly grant leads to members on a variety of topics.
6. MAC has adopted the concept of fully resourcing the ALICE project and major grant efforts are under way.
   1. Local UW support is sufficient to fully fund report production
   2. Received a grant from NBT Bank to support statewide efforts
   3. Invited to submit a proposal to KeyBank for statewide ALICE efforts
   4. Additional grants have been submitted, with plans for future grant cultivation for 2020.
7. Continued work to strengthen financial stability of UWNYS and continue to diversify revenue.
8. Added PayPal and donate now button to our website
9. Added donate button on Charity Navigator site
10. Lead cross sector work on a $27M grant with the Cybercrime Support Network for 2-1-1 and Local United Ways. Grant was not awarded, but the organization of the system has been done, grant written, and advocacy continues for this effort.

# Key Goal #3 - Manage Statewide Initiatives

Provide leadership for statewide initiatives and effective stewardship of resources; managing projects for the benefit of the statewide organization and local members. Initiatives include 2-1-1 New York, ALICE and ESPRI.

ALICE: Asset Limited, Income Constrained, Employed

1. Carried out contract and fiscal sponsorship responsibilities, including managing the relationship with the national ALICE office and supporting the NYS ALICE Steering Committee.
2. Presented ALICE at statewide and regional conferences, including:
   1. National Alliance for Mental Illness,
   2. NYATEP Youth Academy,
   3. Building Community Wealth and Resilience Meeting,
   4. Rockland DSS All Staff Meeting,
   5. CSEA Statewide Meeting
   6. Neighborhood Funders Group: NYS Rural Equity Summit
3. Shared a turnkey ALICE Simulation for member’s use to rave reviews. Materials were offered for free to all members, or members could elect to pay a stipend for UWNYS to assemble it for them (which 4 members did).
4. Assisted three LUWs with positioning ALICE in their communities and presented ALICE to their Local Boards.
5. Presented ALICE to a local United Way’s group of agency leaders and met with them again as they convened to develop a strategy for responding to the needs of ALICE.
6. Engage with other ALICE states to leverage existing strategies.
7. Working on the ALICE NY 2020 product offerings and engagement of partners.

## ESPRI: Empire State Poverty Reduction Initiative

1. Provided leadership and bi-monthly convening to the local UW network to share information and best practices and develop strategies.
2. Provided outreach to the appropriate state agencies and state stakeholders to advocate for United Way lead ESPRI efforts, as well as to intervene and advocate on behalf of a specific member.
3. Advocated for future funding and lead the group in developing an advocacy agenda from ESPRI sites.
4. Guided ESPRI lead sites on their engagement in the Assembly Social Services Committee Hearing on ESPRI. Submitted testimony from UWNYS.

2-1-1 New York, Inc.

1. Develop/maintained relationships with agency decision makers and key program and contracting staff within each agency in order to negotiate contracts, develop budgets, provide required reports and submit reimbursement claims on a timely basis. Current contract agency is OCFS. Connection was reestablished with DHSES.
2. Maintained relationships with the ten regional 2-1-1 lead organizations and leadership of the eight contact centers in order to effectively advocate for and manage grants and partnerships for 2-1-1 services.
3. Maintained the 2-1-1 designation, awarded by the PSC, which includes oversight of the regional lead organizations and 2-1-1 contact centers to insure high quality and consistent service delivery.
4. Supported the 2-1-1 New York Board, which meets quarterly, includes development and oversight of the annual 2-1-1 NY budget. The 2-1-1 NY Board met 6 times in 2019.
5. Continued the development of standards for the 2-1-1 system that will improve service, create efficiencies and enhance sustainability.

See the 2-1-1 update for a full summary of 2-1-1 activities and accomplishments in 2019

# Key Goal #4 - Network Engagement

With the oversight and participation of the Membership Advisory Committee, (MAC) maximize learning and partnership opportunities with and among United Ways to promote economies of scale and maximize impact; and facilitate shared approaches to common interests and priorities.

1. Achieved High satisfaction rates on member survey.
2. Conducted regular outreach and member survey to understand their needs, capabilities and priorities. Staff made personal visits to or presentations at: UWGCR Awards Ceremony, Ulster, Dutchess-Orange, Westchester Putnam, Adirondack, Tioga, Southern Chautauqua, Tompkins, Tioga and Cortland.
3. Facilitated United Way networking activities, including:
4. Monthly CPO conference calls
5. Participating in regional United Way meetings (in Buffalo area)
6. Held our most well attended conference to date, with flex credit approval. Conference had record attendance with excellent reviews and generated revenue from sponsorships.
7. Provided assistance to numerous local United Way requests, including connections to a member United Way with the relevant knowledge/experience, linking to resources available from United Way Worldwide and direct assistance from UWNYS. Examples include:
8. Assisting/onboarding senior staff in two local UWs
9. Assisting two local UWs with CPO performance review processes
10. Assisting with strategic planning at two local UWs
11. Advocating for one local UW, who experienced a mistake in their membership standing with UWW.
12. CEO onboarding assistance in two LUWs, with three more in the works.

We have an executive level turnover rate of 21% annually right now. This prompts great need for a strong network of peer leadership, and commitment to support and development of future leaders.

1. Assessed system interest in various topics and, in conjunction with local United Way leadership, convened calls/webinars to assess needs and design and deliver training or other resources to the network:
2. CyberSecurity Webinar
3. Systems Integration Webinar
4. Organized Labor Calls with CSEA and IBEW
5. Meeting with NYSUT on behalf of members
6. Convened calls for small and large United Ways on Modern UW and Digital Services.
7. Annual Summer Conference
8. Managed summer conference planning committee
9. Maintained responsibility for site management. Negotiated nearly $20,000 in savings for members to attend the conference.
10. Conference held July 17 - 19, included 15 workshops and 2 keynote addresses, attracted 93 participants (included presenters) and generated $7750 in sponsorship support

# Key Goal #5 - Organizational Development and Management

1. Continued work on a board development plan; including diversity and director training objectives, with some progress made.
2. Financial Position: UWNYS has worked hard to diversify our revenue. In fact, 2019 dues comprised 61% of our revenue. Ideas were generated for additional resource development strategies.
3. Obtained a clean audit process for UWNYS and 2-1-1 New York, Inc.
4. Achieved Platinum Level Status with Charity Navigator
5. Support the work of the Board of Directors, its 4 standing committees and 2 program committees. Includes scheduling, report preparation, minutes for committees, follow up and engagement of absent members. Engaged the Board in the development of a new strategic plan for the organization.
6. Restructured Finance and Office Manager position to accommodate reduced hours; hired and onboarded new employee for this position which requires additional supervision, training and support.
7. Researched, purchased, set up and implemented a new IT system for the entire organization. Included: new computers for staff, new telephone system and migration from UWITC provider to MS Office 365. Handled all file transfers, troubleshooting and set up without IT support. Will result in overall reduction in phone bill, telecommuting and cloud storage costs and will increase “up time” and productivity.

## 2-1-1 IMPACT

In 2018, 2-1-1 received 1.74 million phone calls, 21.3 million web visits and 24,734 text-based contacts.

Through the first three quarters of 2019 (1/1 – 9/30), across New York State 2-1-1 made 1,342,066 referrals in response to phone, text, chat or email inquiries, and counted 14,186,555 web visits.

In response to the aftermath of Halloween storms and significant flooding, 2-1-1 took in just under 600 damage reports.

# New York Network Revenue Results for 2018

Data as reported to United Way Worldwide via Database 2 Report.

Current Year Support is the total of all revenue, including campaign, grants, events and direct giving. The total of New York United Way’s CYS was:

$152,588,471 CYS 2018 (-$9,518,492 from 2017)

Campaign reflects dollars reported from Workplace Campaigns. The total amount raised by New York United Ways in campaign was:

$95,235,326 Campaign 2018 (-$8,545,412 from 2017)

Resources Under Management reflects revenue that the local United Way has control over (excludes designated gifts and grants to specific initiatives). RUM was:

$118,812,862 RUM 2018 (-$6,489,108 from 2017)

## New York MEMBER Impact Summary (highlights from Global Results Framework)

**$12,984,402 Invested in Childhood & Youth Success**

70,295 of children (0-5) enrolled in high-quality early childhood programs supported by United Way; 98% achieved developmental milestones

30,344 elementary/middle/high school youth served participated in school and/or community-based out-of-school time programs and/or receive individualized supports

26,289 of middle/high school youth served developed soft skills

**Total amount of resources invested in economic mobility $5,309,472**

12,662 of individuals served received job skills training

37,690 individuals engaged in programs designed to increase their disposable income by accessing benefits and/or lowering their costs

$48,080,000 total dollar amount of refunds returned to individuals/families through VITA and/or MyFreeTaxes

**Total amount of resources invested in access to health $13,893,436**

166,191 individuals participated in physical activity and/or healthy food access/nutrition programs

199,305 individuals were served with access to healthcare services and supports

6,476 children/adults served eat healthier, increase their physical activity, and/or move towards a healthy weight

12,536 youth/adults served who avoid or reduce risky behaviors (e.g. alcohol, drug abuse, unprotected sexual activity)