



## Making Ties for Greater Impact

June 15, 2022

*Building a stronger Miami, together*



United Way  
United Way Miami

Making Ties for Greater Impact - The work of Community Impact is leveraging resources for the greater good - and one of the best untapped resources we have are the connections we can make through our Boards, giving communities, and volunteers. Through developing a clear and actionable agenda, the financial investments your United Way makes in your community can be exponentially greater through policy change. We all know Why advocacy is needed, but most do not have dedicated staff. By the end of this session, you will have answers to the other W questions - and a few H's. Where do I start? What is my end goal? Whom should I call upon? How will this be seen by my donors? How can we do this without a dedicated staff person?

## Why Advocacy?

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It's taking the time to do the right thing – and keeping at it for long enough to make the change.

- **Engages** individuals in making a meaningful difference
- **Lifts up** the voices and experiences of affinity groups, volunteers and Board Members
- **Accelerates** our impact and ability to create policy change



2

It's taking the time to do the right thing – and keeping at it for long enough to make the change. Because no matter how much we fundraise raise, we will never be able to make huge changes like policy can.

Examples:

Eliminated 5 year wait for KidCare

Major reform of early learning quality, accountability and funding in past 15 years

Expanded Medicaid coverage for postpartum women from 60 days to 1 year

Eliminate barriers to jobs for Veterans

## Public Policy - Overview

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- **Our approach to public policy:**
  - United Way engages decision-makers and policy leaders to address important community needs and to leverage the impact of our investments. United Way has a long history of public policy advocacy on behalf of our community's needs through:
    - forums for public discussion and education
    - 'Go-To' resource for policymakers
    - support the nonprofit sector in solving community problems
- We convene and participate in conversations on the needs of our community



3

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## Public Policy - Overview

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- Non-partisan
- Issue focused
- Inform, Educate and Build Consensus
- **Built on Relationships**



4

Distinguish between politics and policy – politics is the show policy is the change  
Policy is the speed limit of the roads you drive, the lunches that your kids eat at school  
and how much our teachers and home health aides are paid

Oxfam International did a wage study last year, in October 2021 when our minimum  
wage hit \$10 more than \$2.12 m Floridians were impacted by that increase.  
How many jobs were they working previously that now they only have to have one or  
two – how is this, every year, going to impact the fiscal cliff built into the structure of  
local state and federally funded programs that have income guidelines?

## What is Advocacy?

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- Public Awareness and Education
  - Raise awareness of an issue
- Grassroots advocacy and organizing
  - Communicating and working in coalition with local leaders



5

Raising awareness about how issues manifest in our communities  
Reminding decision-makers of our shared values and beliefs  
Sharing tested solutions to community challenges  
Helping leaders understand the impact of their decisions  
Rallying others to action  
Transforming our communities for the future

# What is Advocacy?

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## ADVOCACY

- Sharing how a local or federal policy has helped your community
- Inviting an elected official to a program you fund to tour and learn about the need for services in their district
- Telling an elected official how tax credits or funding has impacted your organization or community (EITC, ERTC, etc.)
- As a constituent, emailing your legislator an action alert from another organization

## LOBBYING

- As a **UW employee**, asking **an elected official to vote for or against**, amend or introduce legislation, in person, on the phone or via email.
- Emailing your stakeholders a call to action urging them to contact their elected officials
  - Your time preparing the email is lobbying, your stakeholders responding is not
- Preparing materials or organizing events in support of above activities



6

- Lobbying is:
  1. Speaking to an elected official or their staff
  2. Asking them to vote yes or no on an issue
  3. Doing so as part of your paid employment
- Advocacy is:
  - Staff or volunteers educating outside stakeholders, including elected officials, on programs, data, and issues your UW cares about

As long as you are not spending more than 20% of your organizational time and resources \$ on these activities, you are not violating the IRS substantial purpose guideline

## Where do I start? What is your end goal?

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- Shows up as:
  - Coalition Building
  - Volunteer Engagement
  - Fund Development
  - Interaction with Impact Partners and learn about issues
- Policy Change
  - Uplift ideas to Statewide Consensus Agenda
  - Inform local and state lawmakers – which then becomes the info they rely on when voting



7

What is your end goal?

You are the expert on your community, you know the issues that need attention and the programs make a difference because you fund them. Most elected officials don't have the experience you do and they need to know what you know in to make decisions that impact families and kids in your community.

The most important thing

- Legislative Outreach – access to legislators on timely issues
- Capitol Day – traditionally “feel good” photo ops

## How do you determine your priorities?

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- Internal Alignment
  - Mission and organizational goals and objectives.
  - Goals and objectives of funded programs
    - we advocate for what we fund
- United Way Brand Alignment
  - Does it build on your existing work?
  - Can you do it in a non-partisan way?
  - Would our brand add value?



8

Level of support among constituencies (agencies, contributors, partners)  
Significant support or opposition from major contributors or partners  
Impact of the issue on UW: fundraising, administration, community bldg  
Extent of resources UW can dedicate (expertise, financial, staff/volunteer time)  
Opportunities for collaboration with other organizations  
Political history of the issue  
Opportunity to make a difference (community impact)  
Expectation, and timeframe, for success



## How do you determine your priorities?

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- External Requests
  - Strong partnerships with involved parties
  - Capacity to engage at the expected level



9

Opportunity to make a difference (community impact)  
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## Who should you include?

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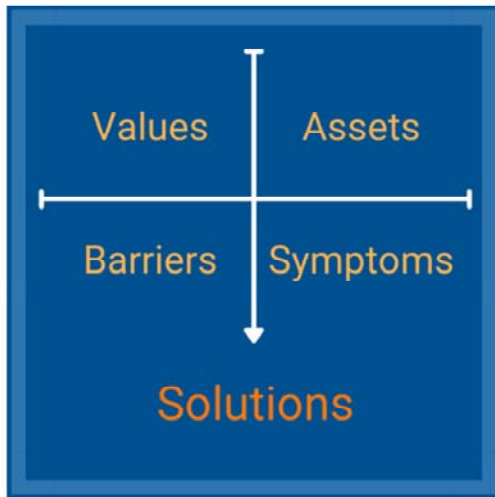
- Policy Change
  - Staff
  - Board
  - Impact Partners
  - Giving Community Leadership
  - Local and State Elected officials



10

Between July 20 – 28, 2021, our United Way Public Policy Committee hosted a series of five meetings organized around our areas of work – Health, Financial Stability, Veterans, Early Learning and Youth. Over 150 volunteers, partners, staff and other community stakeholders participated and heard from 22 Impact Partners and our own signature programs – MISSION UNITED, the Center for Financial Stability, the Center for Excellence in Early Education and the Youth Institute – and listened to some of the challenges they and their clients experience. Participants worked in small groups to identify barriers to success in our community and propose some solutions.

## How do you determine your priorities?



Values: What do we strive for? What would success look like in our community?  
Assets: What does our community do well?  
Barriers: What has been challenging to overcome?  
Symptoms: How do challenges show up in the community?

Solutions: What can we do? Are the solutions policy related? Do they require funding? Are they local, state or Federal?



11

Before the sessions we asked the agencies to think about these 4 things in their presentations – both to provide some logical order to their comments but also for listeners to be able to keep track of what they were hearing and common themes that came up

Take a minute to think about a program you fund, (your favorite CEO, program) and the barriers that you're helping that agency overcome for the community and what success would look like in your community. We try to imagine this future every day but more likely that not policy change is what's required to make transformational change.

## How can I do this without staff?

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- Lean on the statewide team
- Empower your team and Board to bring ideas
- Choose wisely, start slowly
  - Digital resources are abundant – and often overwhelming
- Embrace natural opportunities to educate – this is advocacy!
- Consider developing a subcommittee of your board – volunteers are our greatest strength



12

The Consensus Agenda can be your guardrails, but don't force it. If you don't have expertise in an issue, don't try and pretend. Embrace natural opportunities to educate – your ALICE report release, new 211 data, inviting newly elected officials to an agency site visit related to your highest priority

## What's a Public Policy Committee?

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- Start Small!
  - Executive Committee and Board Members
  - Community Partners – health, education, financial stability and veterans
  - One member from each Impact Council
  - Giving Communities
  - Agency Executives



13

If you try and jump in to this with 30 people nothing will ever get done!

They're a sounding board to learn about issues and give feedback. They

These are the people you can rely on to open the door to elected officials you don't know. You're the issue expert and once you're able to sit down and share your work, they will call on you when they need information related to issues.

You could recruit a new board member who has recently left office because of redistricting or term limits

## Public Policy - Overview

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- UW PPC convenes meetings to discuss potential issues and recommend annual legislative agenda to Board
  - This information feeds in to state policy team work
  - Activate PPC members to participate in other events & convenings
- UWM Board approves legislative priorities
  - United Way and Miami-Dade specific
  - United Ways of Florida Consensus Agenda
  - United Way Worldwide federal agenda support
- Guiding principles for selecting legislative priorities:
  - Maximize revenues
  - Invest in prevention
  - Retain local authority



## Communication Strategies

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If your legislator has not already arrived at a firm decision on an issue, WHAT ARE THE BEST advocacy strategies for influencing his/her decision?



15

If your legislator has not already arrived at a firm decision on an issue, WHAT ARE THE TOP 5 advocacy strategies for influencing his/her decision?

# Communication Strategies



*Communicating with Congress The Good, the Bad, and the Ugly. June 20, 2018. Citizen Engagement.*



16

We are expert storytellers. We do it to fundraise, we do it to talk about the need to fund programs in our communities and it is our job to continue the organizational culture as storytellers to tell the stories of ALICE families to elected officials – ALICE families are invisible in our communities, they do the work no one else wants to do. And our role is to make a seat at the table for them and their stories

Program visits – let the program director be the expert, and help make the connection for ALICE families – UW funds the gap between what's funded by government and what's needed in communities



## How will this be seen by my donors?

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- Your Mission drives your Agenda
  - Lead with what you do best
- *Embrace* hesitancy
  - Use your Board or PPC to check in whenever uncertainty occurs
- STAY IN YOUR LANE
  - We all have **opinions** about TONS of issues, but **knowledge** about far fewer



17

If you are leading with what your donors already know you for you're going to be far more successful than if you try to take on a new issue – we advocate for what we fund.

Are you sharing your knowledge or your opinion – I can tell you what I think about almost any issue but I am an expert on far fewer issues

DEI work - If you don't see inequities in our community that's ok, you are not an aligned donor.

Need to hear about an issue from you a minimum of three times in order to connect you to the issue. Don't spread yourself too thin – focus on one or two issues at a time so they associate you with those issues – UW has been criticized for "doing too much"

# Relationships Matter



 **Senator Rubio Press** ✓  
@SenRubioPress

With one month left of tax season, #Florida residents can access free tax prep services at 190 #VITA sites supported by United Way. To find a site near you, call 211 or visit [irs.treasury.gov/freetaxprep/](https://irs.treasury.gov/freetaxprep/) @UnitedWayFL @unitedwaymiami

5:56 PM · Mar 15, 2022 · Twitter Web App



- Higgins
- Cava
- Rubio
- Wilson

# Relationships Matter

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CONGRESSWOMAN  
**FREDERICA S. WILSON**  
REPRESENTING THE 24<sup>th</sup> DISTRICT OF FLORIDA

[ABOUT](#) [CONTACT](#) [MEDIA](#) [ISSUES](#) [SERVICES](#)



Project Name: **Miami Veterans Housing Project**

Proposed Recipient: United Way Miami

Address of Recipient: 3250 SW 3rd Ave Miami, FL 33129

Amount Requested: **\$4,000,000**

Project Explanation, Purpose, and Justification: This project will fund the Miami Veterans Housing Project needs assessment and allow the pursue housing options including, but not limited to, acquisition of land and new construction, site acquisition(s) and rehabilitation. Funds will serve veterans in the ALICE population that do not qualify for traditional affordable housing programs in Miami-Dade County, regardless of their age or branch of service, with access to safe housing, and access to resources available through the Mission United program and their partners.

Signed Disclosure Letter: [Click Here](#)



## Why? Fundraising!

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- **Capitol Days Reception – Tallahassee (Nov or Feb)**
  - annual statewide convening in Tallahassee for United Way CEOs, Board Members  
Held at the Governors Club, the entire General Assembly and partner organizations are invited. (Recognition for sponsorship of this event is disseminated statewide.)
- **Legislative Reception – Miami – (Dec or Feb)**
  - Held annually between Committee Weeks and Session, the Legislative Reception is an opportunity to invite key stakeholders – United Way Board, Tocqueville Members, Public Policy Committee and our local, State and Federal elected officials to a networking event for our most influential stakeholders.
- **Legislative Wrap-Up – Miami – late Spring**
  - Board, Giving Communities, Impact Partners, and other stakeholders to a panel discussion with members of our State Delegation with a goal of summarizing legislation impacting ALICE families in Miami-Dade.



## ALICE Legislative Tool

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- <https://unitedforalice.org/legislative-district-tool>



## Final Questions

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- Do you think any of this is possible in your UW?
- Whose buy in and leadership would it take to
- What is the most critical issue that need your voice?
- What issues are the lowest barrier for entry?
- Where can the United Way Brand add value



22

Just like fundraising, the relationship building required to influence policy makers is a long game and you never know what will come from the conversations you have with people in your community. A board member might run for office, or you might have a former elected official as an agency executive in your community.