

IMPROVING OUTCOMES FOR THE WORKING POOR

Economic Empowerment Case Study

CLIENT SITUATION

From 2013 to 2018, the United Way agency experienced a steady decline of nearly 25 percent in revenue from donations. Throughout, the agency struggled to adjust its operating budget and, at the time of North Highland's engagement, was tapping into cash reserves to cover expenses.

The agency also struggled with a lack of strategic focus. It had not refreshed its strategy in decades, resulting in an inability to contribute meaningful funds to programs or measure impact in the community. In 2018 alone, the agency funded over 80 programs, which varied widely and provided allocations ranging from as little as \$136 to a high of \$210,000. Historically, the organization worked with a group of 20 or so certified non-profit agencies who were the only organizations eligible to receive funding. This passive funding model was characterized by exclusivity and tilted toward non-profits which received funding based on their own goals rather than alignment with community and United Way driven priorities.

North Highland helped a southeast based United Way agency to redefine its strategic priorities and refocus funding allocations to directly impact programs that support the lives of an estimated 175,000 'working poor' across an eight-county footprint. This pro-bono engagement helped reposition the agency for success through transformation and focus, created an outcomes-based funding model, and engaged public and private sector constituents in driving to consensus.

OUR APPROACH

We initiated a transformational and strategic reset for the organization that would allow them to clearly demonstrate and communicate their value as a contemporary leader in the community. Our recommendations focused on defining the agency's strategic priorities, and creating a competitive grants process and enhanced funding model that eliminated the certified agency process and required those seeking funding to align with the new focus.

The overarching goal for the agency is to shrink at-risk populations in the future by focusing the community's collective resources on three goals and five priority outcome areas:

- **Goals:** Help target populations gain access to basic necessities, achieve economic stability, and develop the skills to either gain employment or move up the economic ladder.
- **Priority Outcome Areas:** Anchor the goals through housing, early learning (to include elementary age and younger), safety net, aging workforce (to also include retired seniors), and skills development.

Stakeholder engagement was a critical component of this transformation. We worked with the agency to ensure agency partners and public and private sector partners remained informed and engaged throughout the process. This was done through 'big reveal' public town-halls. The United Way agency and its board communicated directly with the larger community leveraging local media outlets and promoting United Way's new strategic direction from day one.

Newspaper articles and television spotlights were the first step in building momentum for the ongoing rollout of the strategic plan to make United Way more relevant in serving the community. Key steps taken to ensure stakeholder engagement included announcements to the business community at the local chamber of commerce's annual conference, to the larger community at the workplace giving campaign kickoff, and to previously certified

IMPROVING OUTCOMES FOR THE WORKING POOR

agencies during information sessions. The level of engagement employed was also reflected in the increased focus on accountability and measurable results. The standards for funded programs were clearly defined to provide consistent targets for the collective efforts, resulting in clearer communication with agency partners and the larger community on expectations and outcomes. North Highland recommended bold moves to allow this United Way agency to focus on addressing root-cause problems of poverty, which affect the well-being and stability of the community's most economically vulnerable citizens.

VALUE DELIVERED

North Highland brought our Strategy, Experience Design, People & Change, Program & Project Management, and Process & Business Analysis capabilities to deliver a robust and comprehensive plan characterized by a clearer strategy, defined community outcomes and measures, enhanced funding model, clear stakeholder management and communication plan, and an executable operational plan. The result of this engagement will provide an operating model that aligns with the newly defined mission and puts this United Way agency in the best position to serve the most pressing needs of the area it serves. This will ensure the agency can make the most effective use of resources, and are able to use data and evidence-based outcomes to create meaningful change with the resources they are entrusted to manage.

THE AGENCY CAN MAKE THE MOST EFFECTIVE USE OF RESOURCES, AND ARE ABLE TO USE DATA AND EVIDENCE-BASED OUTCOMES TO CREATE MEANINGFUL CHANGE WITH THE RESOURCES THEY ARE ENTRUSTED TO MANAGE.

ABOUT NORTH HIGHLAND

North Highland is a global management consulting firm known for helping clients solve their most complex challenges related to customer experience, performance improvement, technology and digital, and transformation. We add value and support our clients across the full spectrum of consulting, from strategy through delivery. We bring the big ideas, then we make them real.

North Highland is an employee-owned firm, headquartered in Atlanta, Ga., with more than 3,000 consultants worldwide and 60+ offices around the globe. The firm is a member of [Cordence Worldwide](#), a global management consulting alliance. For more information, visit and connect with us on [LinkedIn](#), [Twitter](#) and [Facebook](#).