

Dues Adjustment Town Hall

Friday March 1, 2024

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Background



United Way of Pennsylvania Dues History

- UWP has not adjusted member dues since 2017 – which was a 5% increase
- Last dues increase prior to that was in 2008
- UWP's budget revenues have grown and diversified – but member dues have decreased mostly due to mergers. In the organization's 2017 budget, dues represented \$313,951. In the 2024 budget, they are expected to be \$270,900.
- Total projected revenue for the UWP Budget in 2024 is \$4.5 million
- There are 50 UWs in PA today, 9 local United Ways are not currently members of UWP

Why dues are still important to UWP

Paying dues is the means to access member services and supports, to agree to be part of UWP, and as a membership association, membership is UWP's purpose for existing

Diversified revenues provide support for UWP's staff capacity, dues help fill in gaps that other funding sources can't pay for, such as:

- Lobbying expenses
- Indirect costs
- Dues funding braided with other grants to fulfill staff capacity – dues help pay for about half of the UWP President and public policy team capacity, and the majority of our member services capacity.

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Potential Add-On, Fee for Service Benefits

ALICE

Potential Benefit Structure:

1. Allow LUWs to invest in the statewide project to contribute to the cost of the research
2. Those who opt-in receive a bank of hours of UWP team consulting time, which may be used for a variety of purposes including:
 - To build community engagement presentations
 - Staff availability to facilitate community conversations on ALICE topics.
 - Development of specialized materials for local or statewide ALICE advocacy
 - Support for resource development strategy to connect ALICE data to fundraising
 - Support for deeper dive on ALICE data to inform LUW community impact and DEI Initiatives
3. Other needs/ideas that bring value to LUWs?

PA 211

Potential Benefit Structure:

1. UWP would develop a rational funding request based on factors like population size, to suggest a minimum required local contribution to PA 211. This contribution would take into account a blended revenue mix which relies on state funding, fee for service contracts at the state and local level. LUW investment helps insure the basic information and referral element of PA 211 is available for all community members.
2. LUW could also invest in statewide coordinating capacity, and have direct access to PA 211's statewide management team to help develop and support community engagement and outreach, or special projects which draw on PA 211's closed loop capacity.
3. Interactive data dashboards through Domo for the community
4. Other needs/ideas that bring value to LUWs?

Learning Management

Potential Benefit Structure:

1. Subscribers to this benefit would receive access to a learning management system which would provide training content to the network which could be used for training/onboarding new employees, professional development training, and content developed by UWP which is specific to the United Way network in Pennsylvania.
2. Help pull together training resources which currently live within individual LUWs to an interactive space where all subscribers can access it.
3. Consider LinkedIn Learning UWW benefit and future changes to learning through UWW.
4. Other needs/ideas that bring value to LUWs?

Grant Support

Potential Benefit Structure:

1. Grant consultation with LUWS
2. Analyze, or help to build revenue development plans
3. Assist with research to diversify funding sources
4. Consultation on fundraising events, sponsorship packages, developing major gift asks
5. Grant seeking and grantwriting support
6. Other needs/ideas that bring value to LUWs?

Other Service Needs?



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UWP Base Dues and Dues Model

Core UWP Membership Benefits

- Access to UWP Member communications like the member digest, member's only web site, social media toolkits/ templates, timely updates from the UWP team
- Access to training and networking opportunities for members, including the monthly member meeting, learning cohorts, episodic training on pertinent topics for CPOs/staff,
- Support for onboarding new LUW Chief Professional Officers
- A member of the UWP management team to attend (virtually or in-person) a local board meeting, as requested by the local United Way, for purposes which might include general update on UWP strategy, context on performance measures for the LUW, governance training, support for advocacy or ALICE engagement, etc.
- Support and engagement on the statewide United Way network's advocacy priorities

Dues Structures of Staffed State Associations in U.S.

- The principal behind actual revenue basis dues is that it is very directly tied to actual fundraising in the network, whereas metro sizes create tiers wherein an LUW's revenue can fluctuate up or down without impacting UWP dues.
- According to a Council of States survey of state associations across the country, most staffed state associations are assessing dues based on DB2 revenue measures like current year support. Only three are using a methodology based on metro size.
 - Metro size-based dues – more predictable for UWP, less fluctuation for local United Ways
 - Actual revenue basis dues – more connected to revenue/fundraising in local communities
- The Member Services Committee has discussed pros and cons to changing the dues structure, and would like feedback from the network

What would a different dues model look like?

UWP dues would be assessed as a percent of a percent on an annual revenue figure, like current year support from the DB 2

- Tiering – smaller percentage of dues assessment for largest United Ways with largest revenues
- *Share Dues Modelling Scenarios*

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Wrap-Up and Next Steps

United Way of Pennsylvania

www.uwp.org

