

## United Way Merger FAQs

### What does United Way hope to accomplish?

- The consolidation of the two organizations gives United Way Bay Area a unique opportunity to strengthen the way United Way serves our communities and creates solutions. Together, we can accomplish more, have a greater impact, and build more capacity to engage people and organizations to move Silicon Valley and Bay Area residents out of poverty.

### Will Santa Clara County be fully represented in this new organization?

- United Way is first and foremost a voice for local communities. In that spirit, we are working to balance a centralized organization that can address the varying needs of diverse local communities while at the same time addressing more effectively the common needs of all communities. For example, we will have a local committee dedicated to focusing on Santa Clara County's community needs. We think this will address any concerns about losing local voices and perspectives.

### Will this affect the distribution of funds?

- As a combined organization we will continue to partner with local nonprofits to invest in programs that align with our mission in improving people's lives. These partnerships will leverage the skills and knowledge of these agencies so that we are investing in programs that work and using our collective power to build strong, comprehensive solutions. We are stronger together. And as always, ultimately our distribution of funds depend on our fundraising successes and capabilities.

### Will money raised continue to be used locally?

- Yes, we will continue to honor donor intent--money raised in local community campaigns will continue to serve local communities per the donor's wishes. It is important to also remember the mobile nature of today's workforce. People can live and work in multiple counties, so the idea of local giving is more regional in nature.

### Why did this merger happen?

- We take our philanthropic duty to the community very seriously and are always looking for ways to be more fiscally efficient so that we're giving as much as we can to direct community support. And together, we can do more than we could do on our own. By aligning, we can replicate and scale programs that have been successful in both regions to become an even greater force for communities. Together, we can accomplish more, have a greater impact, and build more capacity to engage people and organizations to move Silicon Valley and Bay Area residents out of poverty.

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### **Did both organizations already focus on the same things?**

- Both organizations have been working closely together for years.
- Both lead programs that provide free tax preparation for low-income families (VITA and Earn It! Keep It! Save It!). Our combined strength will support setting a goal of bringing more than \$100M in tax refunds back to the local community.
- Both lead 211, an information and referral helpline and website that works 24/7 in over 150 languages, connecting people to essential health and human services such as food and housing. By coming together, the organizations can further leverage this resource to analyze emerging areas of need and scale the program wisely and efficiently.
- The combined organization could also establish a SparkPoint center in Clara County. SparkPoint is a financial coaching program established by UWBA that is already helping people achieve financial stability in 14 Bay Area locations. The new center will help struggling South Bay families and demonstrate that programs developed in other Bay Area counties can be successfully implemented in Santa Clara County.

### **What is United Way Bay Area doing in Santa Clara now?**

- Right now, we're in the discovery process. We are meeting with partners, stakeholders, funders, government, anyone we can to understand the needs of the community and the good work being done there already. From these conversations, we are looking at how we can add value to existing work. We hope to have an informed and better thought-out plan in January 2017. Guided by these conversations, we are beginning to learn that a SparkPoint program would be of real value to the community, a program that we would work with Santa Clara agencies to deliver, so we are also gauging philanthropic interest to see if we can get that process going.

### **Will United Way Bay Area fund the organizations that were funded by United Way Silicon Valley?**

- We will continue to provide financial support to VITA, 211, and the Emergency Assistance Network grantees, programs that both United Ways were already supporting. And past grant promises will be honored. In addition to that, we are wrapping up our last fiscal year and evaluating the results of our year's fundraising efforts. After that, we will know if there is any additional grants that we're able to make. The focus areas of any new grants will be informed by the discovery process that we're currently in so we'll be able to announce that in January 2017.

### **Can I give specifically to Silicon Valley?**

- If you direct a gift made through the United Way to a specific Santa Clara organization, we will ensure that directive is fulfilled. For donations made to fund the larger work of United Way Bay Area, again, the discovery process we're in will help us think through how to budget to support all the regions we work with. These two principles--honoring specific donor directives and budgeting monies donated to further our own work to fulfill the needs identified within our communities--will always guide our work.



### **What will the new United Way Bay Area look like going forward?**

- As a community impact organization, we will be innovative in our approach to poverty and in the way we engage individuals and companies in creating and supporting solutions to poverty.
- As a community fundraiser, we will create new and unique ways to inspire people to help local nonprofits thrive. For example, we will also be working with 10 other United Ways across the country to re-imagine its digital capabilities to reinvent the way people engage with United Way's work.
- We will work together to expand our relationships beyond the workplace to reimagine our corporate partnerships so that we can help companies and individuals reach their philanthropic and community impact goals.
- We will combine talents and relationships to bring our local communities together to develop volunteer engagement opportunities, capitalizing on our strength as a volunteer organization.
- As a combined organization we will continue to partner with local nonprofits to invest in programs that move people out of poverty. These partnerships will leverage the skills and knowledge of these agencies so that we are investing in programs that work.

### **Who approved the merger?**

- The merger was championed by board members of both organizations and we worked closely with United Way Worldwide.