

FREQUENTLY ASKED QUESTIONS

5.31.24

- **Why are the two United Ways considering merging?**

We believe a merger would enhance County-wide impact and provide an alignment of financial and personnel resources to advance the capabilities of partnering organizations to improve the lives of all residents within Chautauqua County. In addition, a merger would:

- Recognize the potential opportunities to increase UW participation by individuals and various county organizations, businesses, and educational institutions.
- Meet the changing and specific needs of our shared and unique partners by increasing available funding for partner agencies and organizations within the county.
- Create a common donor experience and message across Chautauqua County
- Create scale to produce, implement, manage, and increase highly effective community impact across Chautauqua County
- Create more opportunities to receive County, State and Federal Grants
- Strategically attract, retain, and deploy talented and specialized staff by pooling personnel and financial resources.
- Mitigate overhead costs by sharing staff resources, volunteers, facilities, and marketing programs to maximize donor and grant support for partner programs and services.

- **When will this merger occur? How far along are you in this process?**

Our two United Ways have been partnering and collaborating for the last several years in multiple ways. This has included shared fundraising campaigns with certain county-wide employers, along with a shared VITA (Volunteer Income Tax Assistance Program) for the last three years and a shared Finance and Administration Manager for the last two years. Last August, our Executive Directors and Board Presidents first started a conversation about a stronger and more strategic alliance when UWNCC's Executive Director resigned. Our two United Ways formed a "Merger Design Team" in December 2023 and has been meeting at least monthly since then. Currently, our respective boards have signed letters of intent to merge and are reviewing all documents associated with the merger. The next step will be to (likely in June) approve these documents, including a Parent Subsidiary Affiliation between the two United Ways (likely effective July 1), in which UWSCC is the "parent" and UWNCC is the "subsidiary." This will allow us to effectively and more efficiently run operations as one United Way. The formal approval of the merger is anticipated to occur at UWSCC's annual meeting on July 30, 2024. Our goal is that the NYS Attorney General would approve the merger by January 2025.

- **Who has been involved in the decision making and process of this merger?**

The Merger Design team included three board members of each United Way including: Tyler Gotowka, Kelly Dimitri and Jacob Sam (UWNCC); and Vince Horrigan, Carol Hay and Kathy Burch (UWSCC). Both boards have been consistently informed of the process since the design team was formed and provided strategic oversight and decision making at key points. In February, we formally engaged NYCON (New York Council on Non Profits) to provide fiscal and legal guidance, as well as third party facilitation.

- **How will this affect the campaign this year?** We are planning ONE fundraising campaign in 2024, with two co-chairs (one from the Northern part of the county and one from the Southern part of the county). We will have volunteers and cabinet members active in both parts of the county.

- **Can I make sure my donation gets directed only to the Northern or Southern part of the county?** Yes. Donors can designate their United Way gift to a specific agency or to a geographical location in the county.

- **Will you be tracking separately revenue and expenses separately according to Southern and Northern operations?** Yes. In both the short-term and long-term, we will be able to provide reports that show the P&L for both ends of the county as needed. Both our accounting and donor database software allow us to easily provide these.
- **How many agencies supported by both United Ways operate county-wide? How many operate at only one end of the county?** Between both United Ways, we support 34 agencies – 20 provide county-wide services, 10 operate only in the southern part of the county, and 4 operate only in the northern part of the county.
- **What feedback have you received from agencies funded by United Way about the merger?** The feedback overall has been largely positive, especially from the agencies that operate county-wide. This will provide a streamlined funding application and reporting process for them. We have also heard positive expectations around increased impact and ability to assist in mobilizing/convening/building capacity from agencies in the Northern part of the county. There have been some concerns about reduced funding in agencies that operate at only one end of the county, however, that is not anticipated.
- **Will funding be reduced to Southern Chautauqua agencies because it might be needed in Northern Chautauqua County? Will UW staff time and engagement in Southern Chautauqua county be reduced?** We are not planning to reduce any agency's funding due to the merger; in fact, we see the potential for increased capacity around both fundraising and staff engagement. Our United Way team will bring its community impact, marketing, community relations, and ability to strengthen the nonprofit sector to both ends of the county, which we believe will result in increased engagement.
- **What assurances can you give me that agencies in Northern Chautauqua County will still receive funding?** We are absolutely committed to making sure that individuals and families in Northern Chautauqua county get the help they need, and have no plans to reduce funding to agencies that provide this support. In fact, our long-term plan is to increase this significantly.
- **How will you decide how funding is allocated?** We will continue the process that has been effective in making funding decisions for many years by both United Ways – the use of community volunteers to make decisions about the money raised by the community. This involves several allocations panels and volunteers (typically around 50-60). We intend to have a panel specifically devoted to making decisions about Northern Chautauqua County with allocations volunteers who live and work in Northern Chautauqua County.
- **Will there still be a physical location in the Northern part of Chautauqua County?** Yes.
- **Will there still be a staff person devoted to Northern Chautauqua County?** Yes. We have a full-time Community Relations Coordinator for Northern Chautauqua County (Dan Siracuse). This will continue to be the case after a merger.
- **What percentage of board members will come from Northern Chautauqua County?** A minimum of 25% of board members will be from Northern Chautauqua County, as well as serve on the Executive Committee.
- **What kinds of cost savings will be realized if a merger happens?** We will realize several efficiencies in merging, especially in administration. Our anticipation is that more donor dollars will be able to go to community impact.
- **What is the potential for increased fundraising if a merger happens?** There are several businesses, employers and individuals county-wide who do not donate to United Way, and in fact only a small percentage of residents actually make a gift. We believe that there are some effective fundraising strategies we have deployed in the Southern Chautauqua County over the last several years that may be equally effective in Northern Chautauqua County, especially with our capable staff, our united board

members, and a host of other committed community volunteers. It's vitally important to get as many members of the community involved in this in order to increase revenue and increase COMMUNITY IMPACT.

- **Are donor dollars being used to cover expenses associated with the merger?** No. We generously received a grant from the Ralph C. Sheldon Foundation Strategic Alliances Fund that will cover all costs, including filing fees with NYS and other administrative expenses.
- **What will be the new name for the proposed merged United Way?** United Way of Chautauqua County