

Organization

The world's largest privately funded nonprofit organization, with 2.8 million volunteers, 10.3 million donors, and nearly \$5 billion in annual contributions.

United Way Worldwide**The Challenge**

United Way needed to help its worldwide network of 13,000 employees understand which partners have the best performance, which programs are the most successful.

The Strategy

With WebFOCUS, United Way created a self-service analytics environment to visualize data collected during large research studies, enabling local United Ways to learn from their peers, share best practices, and discover opportunities to improve.

The Results

United Way better serves 61 million people each year with targeted, relevant services, as evidenced by the successful distribution of tens of millions of dollars in aid following devastating hurricanes.

Information Builders Solution

WebFOCUS, Portal, Professional Services.

Information Builders helps organizations transform data into business value. Our business intelligence, integration, and data integrity solutions enable smarter decision-making, strengthen customer relationships, improve performance, and drive growth.



United Way Launches Global Performance Management System

Relief Efforts Maximized With WebFOCUS Self-Service Analytics for 13,000 Users in 40 Countries

The world's largest privately funded nonprofit organization, United Way Worldwide conducts nearly a dozen worldwide studies to gauge performance and analyze outcomes in all aspects of its business, including fundraising activities, operating efficiency, and the effective utilization of human capital. The organization recently purchased WebFOCUS business intelligence (BI) and analytics software from Information Builders to support a diverse global staff with varying technical abilities.

The steward of approximately \$4.7 billion in annual contributions, United Way devotes a great deal of time and energy to tracking operational performance. The global human and social services organization carefully monitors all fundraising distribution activities, gathering insight to maximize the efforts of thousands of employees at 1,800 local United Way offices across the world, assisted by millions of volunteers.

"We need to know which local United Ways have the best track records, which programs are the most successful, and which initiatives have the greatest impact," explains Lisa Bowman, executive vice president and chief marketing officer at United Way. "We also need to know what each community needs and how well we are addressing those needs."

Bowman and her colleagues were only able to view resulting data from their studies via tabular reports and high-level summaries. As more sophisticated analytics tools became available, United Way realized that the entire staff would be more likely to recognize patterns, dependencies, and anomalies in the data if it were presented

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Karen Brunn
Vice President of Research
United Way Worldwide

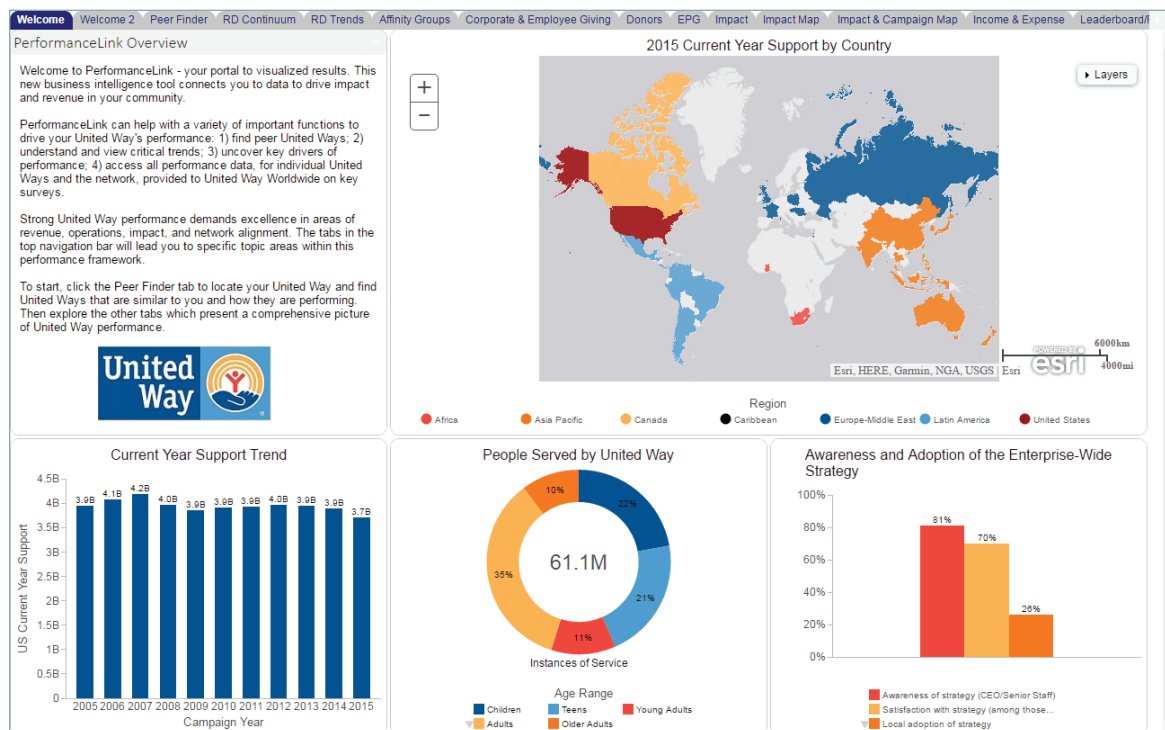
visually through dashboards, maps, and charts. United Way carefully evaluated several market-leading analytics tools before purchasing the WebFOCUS platform from Information Builders.

United Way currently uses WebFOCUS to better track the effectiveness of its charitable activities through PerformanceLink, a self-service BI portal that empowers workers to manipulate performance data and build their own dashboards, reports, and scorecards. Employees and volunteers throughout the United Way ecosystem now access the portal to better understand the needs of the 61 million people United Way serves each year.

“Our goal is engaging our users and helping individual United Way affiliates understand key insights from our national research,” says Karen Brunn, vice president of research at United Way Worldwide. “Our data visualization capability, centered on WebFOCUS, helps individual United Way offices share best practices, identify opportunities for improvement, and better utilize the resources and contributions of our worldwide team. The portal makes the information easier to interpret, understand, and apply to the urgent needs of the communities we work with, all over the world.”

Analytics Transformation

The BI and analytics product United Way sought had to include built-in security to partition various data sets. It also had to be user-friendly enough to enable staff members to create customized scorecards. “Some analytics products were good at data visualization, but they lacked many of the application development and data management capabilities that we needed to create a complete portal environment,” Brunn reports. “Only Information Builders offered this full capability.”



United Way’s interactive portal provides real-time data to 1,800 worldwide locations.

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According to Brunn, United Way selected WebFOCUS because it easily displays and organizes a large amount of performance, demographic, and socioeconomic information on digital maps, charts, graphs, and reports. WebFOCUS offers out-of-the-box components for creating dashboards and InfoApps™ – user-friendly BI apps that enable non-technical users to explore data and analytics content. And WebFOCUS has comprehensive tools for data organization, integration, and governance. United Way’s business community liked WebFOCUS because it merges several layers of data onto an underlying map. Furthermore, WebFOCUS has easy-to-generate scorecards that depict variables such as volunteer involvement, investor trends, and operating efficiency.

Rapid Rollout

Today, more than 13,000 authorized users throughout United Way access the results from the national research studies through topic tabs in the PerformanceLink portal. They visualize information through dashboards as they drill down from an entire region to an individual United Way affiliate, and use location analytics to depict the data geographically. These dynamic displays make it easy to see how each affiliate is performing relative to its peers.

Users visualize data in scatter plots. Color-coded quintile scores reveal performance by population groupings for any dimension they want to see. The portal automatically customizes data based on the location, needs, interests, and security clearances of each user.

“We are providing full access to the data from all our research studies in an engaging, interactive environment,” Brunn reports. “Users have scorecards depicting current and past performance, along with customizable dashboards that let them highlight top performers and performance drivers – all in a one-stop, easy-to-use portal.”

For example, a Peer Finder Map allows United Way affiliates to study the attributes of similar United Way locations based on population demographics, disposable income, employment status, and other variables. This insight helps individual United Ways optimize their fundraising strategies and relationship management techniques, and might one day allow managers at United Way headquarters to predict the success of upcoming campaigns.

“The individual United Ways access data on their peers, see what is working, and share ideas that boost the performance of the entire organization,” Brunn explains. “In a relatively short period of time we discovered and created powerful BI functionality that we couldn’t even have conceived of at the outset of the project.”

Targeted Relief

Detecting patterns in the campaign data not only enables better-targeted and more successful fundraising initiatives, but also allows more relevant distribution of aid. United Way uses PerformanceLink to map need indicators by community against distributions to key health and human service organizations. “Our analytics technology helps us determine how best to distribute funds across the many communities we serve,” says Brunn. “Last year, we raised \$54 million to provide critical support in the disastrous aftermath of hurricanes Harvey, Irma, and Maria. PerformanceLink will revolutionize how we distribute these types of funds. Digital maps depict where United Ways are operating relative to affected areas and allow us to map ‘need indicators’ against these geographies.”

Each United Way office gains a better understanding of how best to meet community needs. They discern opportunities for improvement, identify and connect with peer United Way organizations, and maximize their resources to positively impact each community. For example, some United Ways are proficient at securing grants, others at developing community impact agendas, and still others at raising money from high-net-worth donors. PerformanceLink reveals which communities contain actively engaged volunteers, helping all affiliates share insights about how to raise money and generate resources for community health.

Big Data Analytics

Bowman foresees creating a big data environment in the future to analyze United Way's extensive research data in aggregate, potentially gaining insight into national health and education trends. For example, if they observe that hundreds of communities throughout the United States are experiencing similar issues with early-grade reading – which is a primary indicator for a child's potential to graduate from high school and gain financial stability – this knowledge could engender cooperative efforts to help all schools and communities improve. "Whether the insights pertain to government programs or the private sector, our data could reveal pressing problems facing a large number of communities in the U.S.," she explains.

Brunn and her colleagues credit the Information Builders partnership with helping to keep United Way on the forefront of innovation. "We didn't want to just purchase an analytics platform," she concludes. "We wanted to form a long-term relationship, where we could learn from and continually tap into the provider's expertise. PerformanceLink gives us enterprise visibility. We've opened access to all our national studies and created customizable reports on every part of the portal. The data gives us a deeper understanding of where each United Way stands so they can learn from their peers, share best practices, and discover opportunities to improve."

Find Out More



We can help you succeed. Talk to your local Information Builders representative to learn how. Visit us at informationbuilders.com, e-mail askinfo@informationbuilders.com, or call **(800) 969-4636** in the U.S. and Canada. To improve your skills, visit education.ibi.com.

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