



United Way  
of Broome County

# Glossary of Terms

Language influences what we can accomplish. Having a common understanding of the terms that are used on a daily basis can contribute to successful processes and outcomes. The following definitions are used throughout the Strategic Plan (July 1, 2019-June 30, 2022) and the work of United Way of Broome County.

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**501(c)(3):** Organizations that must have charitable, religious, educational or scientific purposes to meet the requirements of being exempt.

**Advocacy:** Educating and creating awareness among legislators and the general public of issues facing the community and the importance of aligning public policy to address the need. Specific to actions of United Way of Broome County, advocacy does not endorse or oppose specific legislation, but rather informs the community at large how public policy decisions impact service provision.

**Alliance of Information and Referral Systems (AIRS):** The professional membership association for community Information and Referral (I&R). AIRS is the driving force behind the delivery of quality I&R services and the sole source for standards, program accreditation and practitioner certification for the I&R sector. AIRS is the accrediting body for I&R services.

**Alexis de Tocqueville Society:** Comprised of leading philanthropists who understand the value of a major investment in our community, especially when directed and leveraged. An individual or individuals who donate more than \$10,000 per year is classified as a member of this society.

**Binghamton-Broome Anti-Poverty Initiative (BBAPI):** A community driven effort to break the cycle of poverty in Broome County. By applying the Collective Impact framework to first explore, then address the root causes of poverty, BBAPI focuses on creating systems-level social change to find solutions to the immediate and long-term barriers affecting individuals impacted by poverty.

**Broome County Community Organizations Active in Disaster (BCCOAD):** A membership organization, comprised of independent agencies and organizations who may be active in any, or all, phases of disaster in Broome County, New York. The purpose of this organization is to streamline services during all phases of disaster.

**Budget:** A description of a financial plan. Lists the estimates of revenues to and expenditures by an agent for a stated period of time.

**Building Blocks:** Education, financial stability and health. These support a good life and a strong community.



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**Campaign Advisory Committee:** A committee made up of former Campaign Chairs who are responsible for selecting the Campaign Chair each year.

**Campaign Cabinet:** A group of community volunteers from various sectors (retail, construction, manufacturing, healthcare, government, education, non-profit, etc.) who work to raise funds for the Community Campaign. Meetings are typically held once a month.

**Campaign Chair:** An individual selected by Campaign Advisory Committee to lead the annual Community Campaign. Campaign Chairs serve a 1-year term.

**Campaign Kickoff:** An annual event, typically held in the early fall, to mark the start of the Community Campaign, introduce the new Campaign Chair, gather the ECMs and share the work of United Way of Broome County.

**Capacity Building:** Support for trainings and/or activities that are designed to improve and enhance an organization's ability to achieve its mission and sustain itself over time. This can include, but is not limited to, improving the governance, management, or program service capacity through strategic planning, fundraising skills, program evaluation, and/or board development.

**Capital Improvement:** The addition of a permanent structural change or the restoration of some aspect of an organization's useful property that will improve and enhance its ability to achieve its mission and sustain itself over time.

**Ca\$h Coalition:** Dedicated to helping families and individuals in Broome County save money and improve their financial stability. Partners include Family Enrichment Network (FEN), Broome County Department of Social Services (DSS), and the American Association of Retired Persons (AARP).

**Client Relationship Management (CRM):** Technology for managing business relationships and interactions with donors and potential donors. This system keeps information on individuals who interact with the organization – including their contact information, their employer, how much they've donated, and more.

**Collaboration:** A strategic alliance between entities that is intended to achieve greater impact than any one entity could generate on its own. These alliances exist along a broad spectrum of approaches, ranging from less integrated associations and coalitions to more highly integrated joint programming and shared services.



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**Collective Impact:** Brings people together, in a structured way, to achieve social change. Starting with a common agenda, organizations come together to collectively define the problem and create a shared vision to solve it. It establishes shared measurement, where organizations agree to track progress in the same way, which allows for continuous improvement. It fosters mutually reinforcing activities, meaning organizations coordinate collective efforts to maximize the end result. It also encourages continuous communication, where organizations build trust and relationships among all participants. Finally, it has a strong backbone organization that is dedicated to orchestrating the work of the group.

**Community Impact:** Used to convey how organizations, businesses or individuals' actions have a positive influence on the surrounding community.

**Community Based Organization (CBO):** Nonprofit groups that work at a local level to improve life for residents. The focus is to build equality across society in all streams, including but not limited to, health care, environment, quality of education, access to technology, access to spaces and information for the disabled.

**Community Campaign:** The annual campaign to raise funds for projects and programs. Runs from July 1 to June 30 each year, traditionally kicking off around the time of Day of Caring.

**Community Commitment Plan:** United Way of Broome County's name for the organization's 3-year 2019-2022 Strategic Plan.

**Community Conversation Café:** An interactive process which brings together members of the community, encourages them to think, discuss and explore the aspirations for their community. They create awareness of common issues and solutions and link people with those who have similar struggles and aspirations.

**Community Needs Assessment:** Seek to gather accurate information representative of the needs of a community. Assessments are performed prior to taking action and are used to determine current situations and identify issues for action, establishing the essential foundation for vital planning.

**Community Partner:** An entity that partners with United Way of Broome County in one or more various ways, including but not limited to an event, initiative, or goal. United Way of Broome County respects and supports the autonomy of Community Partners to govern their operations and activities and to determine the policies, practices, and direction that best support the Community Partners' mission and strategic direction. United Way of Broome County has no responsibility or liability for the day to day operations of the Community Partner.

**Continue United:** Opportunities for retired individuals to stay involved in the vital work of United Way of Broome County through giving and/or volunteering.



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**Contribution:** A voluntary donation of funds, services or assets to an organization in which the donor expects to receive nothing in return.

**Data Management System (DBMS):** A software package designed to define, manipulate, retrieve and manage data in a database. Generally manipulates the data itself, the data format, field names, record structure and file structure. It also defines rules to validate and manipulate this data.

**Day of Caring (DOC):** Conceived as a remembrance to those who lost their lives during the terrorist attack on September 11, 2001 and to honor the many heroes that evolved from the aftermath of that day. It has continued through the spirit of local volunteers and has grown into an annual tradition. Each year, nearly 1,000 volunteers come together to lend a hand to local non-profits, child care centers, parks and government agencies.

**DB-2:** Database 2 Survey, due to United Way Worldwide annually.

**Designation:** A process by which a donor selects where they want their gift to go. This can be any qualified 501c3, anywhere.

**Determination Letter:** The letter received from the IRS by a nonprofit organization stating that the organization is exempt from federal income taxes. It also indicates which section of the Internal Revenue Code the organization qualifies as exempt under.

**Diversity and Inclusion:** Involves respecting and embracing diverse abilities, perspectives, identities and experiences. It includes the promotion of equity-welcoming, celebrating and valuing the contributions of all.

**E-Pledge:** A safe, secure platform for individuals to give electronically through an email link.

**Emerging Leaders Society (ELS):** A group of young professionals who focus on advancing United Way of Broome County's strategic priorities through professional development, educational opportunities, volunteerism and networking events.

**Empire State Poverty Reduction Initiative (ESPRI):** A \$25 million program that brought together state and local government, non-profit and business groups to design and implement coordinated solutions to increase social mobility in ten communities with the highest poverty rates across upstate New York. Under Governor Cuomo's leadership, the state made targeted investments in capital projects to improve the quality, efficiency and reach of services that address poverty, including job training, public safety, and health and nutrition programs.

**Employee Campaign Manager (ECM):** A contact at an employer who coordinates the in-house campaign.



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**Evaluation:** The systematic assessment of an initiative, program or policy; including the collection and analysis of qualitative and/or quantitative data. It not only looks at whether the program is achieving its intended objectives, but also explores why or why not and the implications for the organization. It may also include exploration of unintended outcomes.

**Fiscal Year:** Usually begins on the first day of the beginning month and ends on the last day of the 12<sup>th</sup> month. Most often, these run on a calendar year. The fiscal year of United Way of Broome County runs from July 1 to June 30.

**Form 990:** Must be filed annually by tax-exempt organizations to report information on organization's programs and activities. An alternate form, 990-EZ or 990-N may be filed if the organization meets specific requirements.

**Foundational Funding:** Support for families to meet their basic needs for food, shelter, and safety as a foundation for a quality life. When needs are unmet and uncertain – if we are hungry, if we don't have a place to sleep, if we are in fear for our safety – the other challenges we encounter in life become even more difficult to overcome. We cannot focus on getting a better job, going to school, or taking care of our health. United Way of Broome County provides foundational funding to programs that help people overcome life's challenges and meet their basic needs, so they are prepared to take advantage of all the resources that allow them to build a better life.

**Funded Community Partner:** Any CBO that is currently receiving grant funding from United Way of Broome County. United Way of Broome County respects and supports the autonomy of Funded Community Partners to govern their operations and activities and to determine the policies, practices, and direction that best support the Funded Community Partners' mission and strategic direction. United Way of Broome County has no responsibility or liability for the day to day operations of the Funded Community Partner.

**George F. Johnson Society:** An individual or individuals who donate between \$1,000 - \$9,999 per year is classified as a member of this society.

**Generally Accepted Accounting Principles (GAAP):** The standard framework of guidelines for financial accounting established by the Financial Accounting Standards Board to help ensure accuracy and consistency in financial statements.

**Giving:** Anything that someone donates towards our work. This includes someone's time, talent, and treasure.

**Global Corporate Leadership (GCL):** These are corporate partners with United Way. Typically, GCLs partner with United Way in their headquarter city, invest at least \$1.25 million or 50% of campaigns of \$2.5 million or more through campaign contributions, engage with United Way beyond just workplace giving, commit to partnering in several countries, and employ at least 25,000 people around the world. Currently, there are 80+ GCLs working with United Way.



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**Healthy Lifestyles Coalition (HLC):** A collective impact initiative that empowers neighborhood residents to adopt healthy lifestyles and achieve positive health outcomes. The goal is to assist with reducing obesity and associated long-term risks for chronic disease in our community; through the promotion of targeted multi-level interventions that improve habits and behaviors related to healthy lifestyles.

**Holiday Celebration:** An annual event to thank donors, draw winners for donated raffle prizes, and share the work of United Way of Broome County.

**Hybrid Funding:** A mix of project funding and operational funding to support community organization's programs and services.

**Impact Council:** A group of volunteers that reviews applications for funding submitted by local CBOs and makes funding recommendations to the United Way of Broome County staff and Board of Directors.

**Impact Tours:** An opportunity to showcase a strategically chosen funded community partner to invited donors and volunteers.

**Information & Referral (I&R):** Specialists trained to connect people with resources that can help them. Individuals may be seeking assistance with childcare, education and training, housing, transportation, employment, emergency shelters, disaster services, mental health and crisis assistance, senior care, disease and health information, and more. United Way of Broome County's I&R Specialists provide assistance over the phone, through text, and by maintaining a searchable resource database of programs and services.

**In-Kind Contribution:** A contribution of goods or services rather than cash.

**Intern:** An un-paid individual associated with a local school or university (Binghamton University, SUNY Broome, school district, etc.) who works on specific projects assigned by United Way of Broome County staff during the spring/fall semesters and/or over the summer months (June-August).

**Leadership Donor:** An individual or individuals who donate more than \$1,000 per year. This donation classifies them as a member of the George F. Johnson Society or Alexis de Tocqueville Society, depending on the donation amount.

**Leadership Services:** Can include but is not limited to: convening high profile, issue-based discussions on solutions, identifying gaps in services, encouraging and supporting alignment of partners on collaboratively breaking down barriers, and finding solutions to critical needs of the community.

**Macro Budget:** Splitting spending into two very general groups: 'needs' and 'wants'. Unlike micro budgeting, not every individual spending category needs to be examined.





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**Management & General Expenses:** Expenses associated with the overall administration of the organization that are necessary to keep the organization and programs running, but are not directly connected to a particular program or with fundraising. These expenses are sometimes also known as indirect expenses.

**Micro Budget:** Keeping an eagle eye on every microscopic activity that goes on in a bank account, carefully planning how each and every dime and nickel in the account is going to be spent.

**Mission United:** Connects veterans and their families with the services they need – from securing a roof over their heads, to finding a stable job, to getting health treatment. By creating a coordinated care network that provides a straightforward entry point, a dedicated and well-equipped case manager and a team of service providers committed to meeting all of a veteran's needs, it can be ensured that they no longer slip through the cracks but instead, lead productive, fulfilling, healthy lives as members of our communities.

**Philanthropic Identity:** The community involvement and interests of an employer. This also includes how an employer may inform and influence their employee's philanthropic values and behaviors.

**Program Expenses:** Expenses necessary in carrying out the organization's mission or purposes that are part of programming. For example, space used for an afterschool program or the salary of a counselor working with clients.

**Organizational Culture:** The underlying beliefs, assumptions, values and ways of interacting that contribute to the unique social and psychological environment of an organization. This culture affects the way employees interact with each other, with clients, and with stakeholders.

**Request for Proposals (RFP):** A funding document used to solicit applications for specific programs or initiatives. This document details funding requirements, narrative questions, and specific deadlines.

**Shared Services:** Centralizing administrative functions of organizations that were once performed in each separate organization. Examples of services that can be shared include finance, payroll, human resources, and information technology.

**Site Visit:** A visit made by Impact Council members, United Way of Broome County staff and/or Board Members to evaluate a funded program.

**Stakeholders:** Anyone who has a stake in the work that United Way of Broome County does.

**State Employees Federated Appeal (SEFA):** An annual fundraising campaign for state employees that begins in the fall and runs through the end of the year. United Way of Broome County manages SEFA for Broome, Tioga, and Chenango counties.



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**Strategic Volunteer Engagement Committee:** Supports planning for National Days of Service (including but not limited to Martin Luther King Jr. Day, National Day of Remembrance, and Day of Caring,) and specific volunteer events.

**Supportive Services:** Can include but is not limited to: trainings to help building capacity, online and social media promotion, marketing materials, offering space for meetings and convenings, and trainings on topics such as volunteer recruitment, grant writing, and evaluation.

**United Way Worldwide (UWW):** The central leadership organization for the entire United Way global network.

**Volunteer:** An individual who serves on a committee, the United Way of Broome County Board of Directors, works with Volunteer Income Tax Assistance (VITA), specific projects and/or events. Those who are interested in volunteering with a specific organization or program utilize the contact form at [https://www.uwbroome.org/v\\_profile/](https://www.uwbroome.org/v_profile/) and are referred when possible.

**Volunteer Administrators of the Southern Tier (VAST):** A group of volunteer engagement professionals from various agencies across the Southern Tier who meet monthly to discuss various topics related to volunteerism. Annually, this group organizes a volunteer conference and recognition reception during National Volunteer Week.

**Volunteer Award:** Awarded to a person that goes above and beyond in giving back to their community through volunteerism. Recipients are chosen by VAST.

**Volunteer Income Tax Assistance (VITA):** Provides free federal and state tax preparation for taxpayers living in Broome County annually from January-April. To ensure the quality of the service, tax preparers receive many hours of training and are certified by the U.S. Internal Revenue Service.