

# Our Vision for the United Way of Chautauqua County **STRONGER TOGETHER**

The Merger Design Team is recommending that we continue exploring the merger of the United Way of SCC and United Way of NCC through this **Value Proposition**:

*Our recommendation is based on the enhanced County-wide impact that we could provide through an alignment of financial and personnel resources providing a coherent donor experience to advance the capabilities of partnering organizations to improve the lives of all residents within Chautauqua County. We desire to see a United Way of Chautauqua County:*

- 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.

## **ACCOMPLISHMENTS TO DATE:**

- Received funding from the Ralph C. Sheldon Foundation “Strategic Alliance & Partnerships” Grant to cover merger exploration and implementation costs.
- Engaged NY Council on Non-Profits (NYCON) to provide third party facilitation and consulting in the process and legal requirements by NYS.
- Sought feedback from our agency partners, major donors, and community leaders at both ends of the county.

## **TIMELINE:**

- August 2023: First conversation about a potential merger broached with board presidents and executive directors.
- December 2023: First meeting of the “merger design team” (later changed to merger taskforce) to begin process, including creating a values proposition. Included three members from each board. This taskforce has been meeting an average of 1-2 times per month since then.
- March 2024: Both boards sign letters of intent to merge.
- June 2024: Both boards review and consider approval of the Merger Agreement, as well as details of the Parent Subsidiary Affiliation.
- July 30, 2024: Vote to approve merger at UWSCC’s Annual Meeting of the Members, including approval of new Northern Chautauqua County board members.
- January 2025 (tentative): NYS Attorney General approves merger: legally and fiscally United Way of Chautauqua County.