Report on Oral Defense of Thesis

A Study of the United Way of Portage County, Wisconsin To Examine Selected Aspects of Organizational Communication in Volunteer Organizations

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Date: 9/28/80
A STUDY OF THE UNITED WAY OF PORTAGE COUNTY, WISCONSIN

TO EXAMINE SELECTED ASPECTS OF

ORGANIZATIONAL COMMUNICATION

IN VOLUNTEER ORGANIZATIONS

By

AGBOR TANYI

A Thesis Submitted In Partial Fulfillment

Of The Requirement For The Degree Of

MASTER OF ARTS

IN

COMMUNICATION

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1980
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I am deeply indebted to my wife, Martha, for her continuous dedication in seeing that this study was completed by giving useful suggestions. I am also indebted to the following: Ann Woyak, for typing the first draft; Sandy Misiewicz, for typing the final copy; and fellow Cameroonian students in Wisconsin and particularly those registered at the University of Wisconsin-Stevens Point, for their advice on the current volunteer organizations in the Republic of Cameroon. Thank you all.

September 22, 1980

Agbor Tanyi

Stevens Point, Wisconsin
DEDICATION

To Daniel Tanyi-Mbu, for his fatherly love and affection, and although he left the world on November 21, 1979, before I ever completed my studies, I will never forget his fatherly kindness. To Elizabeth Tanyi, my mother, she must not forget to know that I do feel the absence of our beloved father and husband just as she does. But she must remember it is the path we all shall have to take. I will never forget their parental affection.
CHAPTER I

INTRODUCTION

The Subject and Purpose of the Study

The main purpose of this study is to observe and describe selected aspects of the communication system of a volunteer organization, analyzing and reporting its communication functions and processes. Thus, it is a study in a relatively neglected area of organizational communication, the unique problems in managing the communication processes of a community organization made up of volunteer and unpaid members. The United Way of Portage County was selected as the subject organization because it is a large, complex, and typical community organization in itself, but also because of its relation to more than 20 other local community organizations which it finances in part. As a supplementary concern, this kind of a study should also make possible a preliminary estimate of the applicability of such communication systems to coordinate volunteer organizations at local levels in developing countries.¹

¹Since I plan to return to my home country, the Republic of Cameroon in West Africa, after the completion of this thesis, and to work in the national development field, I will present some conclusions on the above in Chapter V with respect to the Cameroon specifically.
Method of the Study

This thesis is fundamentally a "field study"; its method is mainly descriptive, based on a detailed observation and report of the communication practices of the Portage County United Way organization. The operating functions of this organization were carefully examined and described to arrive at some conclusions about the characteristics of communication processes that were carried on by its members and staff.²

In order to describe the communication system in the United Way of Portage County, the following coordinative functions and processes were used as guidelines for field observation.³

1. How the United Way, through its Campaign Committee, developed strategies commonly used to raise money from the community

2. How the United Way, through its Planning Committee, assessed the priority needs of the community of Portage County

3. How the United Way, through its Allocations Committee, made decisions on which agencies should be funded and how much money should be allocated to each of the funded agencies

4. How the United Way monitored and assessed the performance effectiveness of the participating agencies which had been funded.

In short, to describe the structure of the Portage County

²Terrence J. Albrecht, "The Role of Communication in Perceptions of Organizational Climate." Communication Year Book III, 1979, pp. 343-355. Same process used by the UW has been discussed and recommended for volunteer organizations.

³Literature of the Portage County United Way (the functions of the committees of the organizations).
United Way, it was necessary to examine how it had been designed to achieve its goals. This was primarily done through observations, interviews, and by examining the organization's documents.

In terms of organizational communication, the structure of the United Way organization was explored in terms of the processes of vertical/lateral, formal/informal, and internal/external communication. The purpose was to discover how these standard organizational committee processes were structured and used to achieve the goals of the Portage County United Way. In a simplified form, the term "communication system" is used to include the above standard structures and the following functions:

1. How information flows into, within, and out of the United Way organizations\(^4\)

2. How the communication system was used for making policy and administrative decisions, how members of the United Way managed communication whenever they were involved in some kind of problem situation

3. How supervision\(^5\) was carried out within the organization; i.e., how the organization used communication to implement plans.

In performing the field study, therefore, the following actions were taken:

\(^4\)Stephen W. Littlejohn, Theories of Human Communication. (Columbus, 1978), pp. 317-21. He discusses information flow just as I intend to do in this study.

\(^5\)Aubrey Sanford, Gary T. Hunt, and Hyler J. Bracey, Communication Behavior in Organizations. (Columbus, 1978), pp. 10-16. The supervisory role in the UW geared toward the path it has been treated in this text.
1. The flow of formal communication within the organization was examined carefully in the organizational chart, the corporate regulations, and various policy statements and written documents;

2. Permission was secured to attend meetings of the committees and the Board, conferences, seminars and a workshop for volunteers organized by the Portage County United Way;

3. Personal interviews were held with individual members of the Board, the Executive Director, and several committee chairmen. This helped to explore both formal and informal communication in the United Way;

4. A study was also made of problems in communication in the organization and their search for better means by which the communication system could be structured so as to eliminate some of the problems common to volunteer organizations.

To estimate the applicability of the United Way organization in the Cameroons, West Africa, it was necessary to consider the significance of this kind of volunteer approach as a means of increasing local autonomy and responsibility in rural areas of developing countries. The funding issue was also considered to be of importance; some estimate as to the availability of rural land wealth as a basis for voluntary contributions were drawn. A cross-section of thirteen Cameroonian students at the University of Wisconsin-Stevens Point was interviewed. This group of students also made some suggestions as to what human service organizations now exist and should be given priority should the United Way approach be

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6John W. Baird, Orientations to Organizational Communication. Modcom (Modules in Speech Communication), 1978, pp. 10-16. The pattern of the flow of formal communication in the UW has been designed to be like the one in the text mentioned above.
adopted in Cameroon. Finally, some problems in adapting this approach to the culture of Cameroon were reviewed, taking into consideration the pattern of attitudes in the rural communities of the Cameroon toward voluntary organizations.

The literature that was used for the study included the following areas; some sample bibliography items are listed.

1. Standard organization communication textbooks, and selected primary sources for them

2. Materials on the Management of volunteer organizations, such as:
   a. Wilson, Marlene. Effective Management of Volunteer Programs, Volunteer Management Association, 1979

3. Literature on the United Way. A sample of this literature is:
   a. Annual Reports of the United Way of America
   b. Annual Reports of the local United Way of Portage County
   c. Other supporting material.

4. Information on voluntary organizations in Cameroon was collected from the Cameroon students studying here at the University of Wisconsin-Stevens Point.

5. Selected Master's Theses; some of these included:

A complete bibliography is available at the end of this thesis.

Footnote: The review was by Cameroon students at the University of Wisconsin-Stevens Point. The author has tried to remain unbiased about the assumptions on whether the UW would work in Cameroon or not and wants to report but on review carried out on Cameroon students in the UW-Stevens Point.
The Significance of the Study

The main significance of this study lies in its contribution to further an understanding of communication processes in volunteer organizations in the United States and to further refinement of methods for the investigation of organizational communication in field studies. The study should also contribute to the study of management of volunteer organizations, and the United Way of Portage County specifically. As noted earlier, a brief estimate will also be included of the potential for using the voluntary organization approach in developing countries, with Cameroon as a specific focus.

The Plan of the Study

Two major blocks of background information are presented first: Chapter II will present a brief history of cooperative community fund raising for local charity operations in the United States and of the national and local United Way organizations. The main objective here is to show the development of the unique and most significant functions of the subject organization. Chapter III presents the details of the structure of the United Way of Portage County, Wisconsin--how it is organized to perform its main functions. Chapter IV describes a selected set of communication processes through which these functions are pursued. Chapter V

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draws summary conclusions from the study and presents an estimate of the transferability of the United Way process to the Cameroon.
CHAPTER II

THE HISTORY AND CURRENT PROGRAMS OF THE UNITED WAY

Origin of Cooperative Community Organizations in the United States

The origins of the United Way movement go back to efforts in the post-Civil War period to achieve better coordination and cooperation among relief dispensing organizations. The first fully cooperative organization was formed in Denver, Colorado in 1887 as a result of the joint effort of two ministers, a priest and a rabbi.¹ It is so regarded because it was the first attempt to perform both the community needs analysis and the single coordinated campaign function among the local charity organization societies of that time.

The Early Cooperative Community Organizations

The first actual planning organization for community funding is considered to have been formed in Pittsburgh, Pennsylvania in 1908. It was called Associated Charities and was structured and carried on activities substantially comparable to many United Way Planning Organizations today. The first modern United Way fund-raising organization was formed in Cleveland, Ohio in 1913. It allocated funds to agencies on the basis of need. The appeal of this cooperative charity

movement continued to grow, and in 1917 World War I spurred the War Chest Movement. By war's end, nearly 400 War Chests had raised more than $100 million. In 1918, the American Association for Community Organizations was organized. This was the forerunner of the modern United Way of America. By 1919, Rochester, New York coined the name "Community Chest," and by 1927 all larger American communities except New York, Chicago, and Boston adopted federated financing. Across the United States in that year nearly $69 million was raised in 314 cities. The years 1929-1935 brought the depression. At this time, the Chest was mobilized to fight hunger and want, but soon fell into serious financial difficulty as voluntary funds became harder to raise. In 1933 (during the time of the "New Deal"), less money was in private hands, and led to a growing attitude of "let Uncle Sam do it." Voluntary giving dropped as a result of this attitude: only about $100 million was raised in 397 campaigns (in 1931); by 1933, this amount declined by over $30 million. Yet the result was an increase as a percent of gross national product from .0938 in 1930 to .1270 in 1933.

The years 1939-1945 were dominated by World War II. During this time, the United Relief, Incorporated was organized to coordinate foreign relief appeals, and later this body was known as the National War Fund. By 1943, the war had sparked a great surge in fund raising. Nearly $167 million was raised in 1942, giving an increase of 53% over the previous year. The peak was reached in 1944 when $226 million was raised by
773 communities during the last full year of the war.

By 1947, many communities with United campaigns had topped the $1,000 mark. Thereafter, in the post-war prosperity, the United Fund concept spread rapidly; in 1949 in Detroit, Michigan, $9,267,000 was raised—making an increase of $3,423,000 over the previous year. This progress continued through 1959 when 2,145 funds raised $465 million; this amount was later to get to the $817 million mark (in 1969), raised by 18 million volunteers for about 36,000 local, state and national agencies. Over 31 million families benefited from these funds.

The years 1970 and 1971 brought a reorganization of the United Way of America.2 A national headquarters was established in Alexandria, Virginia. By 1972, standards of excellence for local United Way organizations were also adopted. The idea of the United Way spread beyond the United States. By the year 1974, over $1 billion was raised in the United States and Canada. This was the first time in history that an annual private fund campaign of a single movement raised over $1 billion.

To improve the activities of the United Way of America, the "Program for the Future" was adopted by the Board of Governors in 1976 and began an effort to triple campaign results in ten years. For the years 1977 to the present, the United Way organizations in the United States have raised a record

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2Ibid, pp. 1-12.
$1,204,835,000, a 9.1% increase. Under the Program for the Future, growth has exceeded $100 million in a single year for the first time.

The Distinctive Characteristics of the United Way Organization

Perhaps the factor which most distinguishes the United Way is that it provides a single fund drive for many agencies, instead of having each agency do its own. This avoids irritation to the contributor when solicited by many different agencies, and it also saves money in the course of doing many separate drives. It advertises and administers the fund drives more effectively, and it prevents fraud by preventing fund drivers to raise money by unverified and uncontrolled agencies.

A second characteristic of the United Way is that it is a cooperative plan for local community control of charity funding. If all agencies in the community are allowed to operate independently there will be no planned community control for the allocation of total funding by need. People can only decide to give or not to give to a specific organization, but then they do not have an agency such as the United Way to determine priorities and real budget needs. The United Way provides a cooperative plan for determining total community giving, to provide control through need assessment, fund allocation and monitoring of the agencies. These functions can only be done if the charitable agencies are
combined in a cooperative plan.³

Other unique characteristics include cooperative inter-
action among the agencies instead of competitive separateness
among them.

The United Way approach also makes more efficient use of
volunteers to carry on with the day-to-day work, including
the time-consuming key jobs on campaigns and committees.

Finally, and of great importance, is the unique assistance
the United Way approach provides in placing charity between
government services and privately purchased services. Many
community needs demand public responsibility and public fund-
ing and become a function of local, state or federal govern-
ment. Other needs can and should be met by private purchase
of services from business or professional organizations (an
example is a day care center for children of middle class
working mothers; see Chapter IV). The United Way Board and
committees can make a continuing study of these changing cir-
cumstances and assure a community that these three means of
meeting local needs are kept, as far as possible, in optimum
balance (private business, government, and charity).

³Pauline L. Hanson and Carolyn T. Marmaduke, The Board
Member: Decision Maker for the Non-Profit Corporation
The Portage County United Way

Origins, Growth and Changing Purposes

The first organization leading to the United Way of Portage County was established in 1945 as the Stevens Point War Chest, by Ed Wotruba and Rollin Mabie, co-chairman of the fund drive, and Clarence Pfeiffer as treasurer. ¹

The Stevens Point War Chest changed to Community Chest Council in 1948, with Al Schein as drive chairman, Sam Kingston as president. Later on, in 1959, the United Fund of Portage County was incorporated under Joseph R. Hartz as president. Ten years later, the United Fund of Portage County became countywide. In 1971, it employed a professional fundraising firm and reached a goal of $134,561 thereby exceeding $100,000 for the first time. In 1972, the United Fund of Portage County changed its name to the United Way of Portage County, Incorporated. It was later reorganized in 1973 and Kathleen Jankowski was hired as its first full-time executive director. During the years 1976-1980, the organization grew a great deal. Its goals have been achieved, exceeding $200,000 for the first time in 1976 and $317,326 in 1980, working with Cheryl Currie (August, 1976 to June, 1978) and Cheri Smith (1978 to present) as executive director. ²

¹ A brochure on "A Short History of the United Way of Portage County."

Areas of Service in Current Programs

The United Way, locally and nationally, is concerned with the effectiveness of health and welfare services regardless of the auspices under which it is provided or other sources of funding. The programs in which the United Way of Portage County participate are all within Portage County. They must provide a service to: (1) health; (2) welfare; and (3) recreation. In general, the funded agencies may not offer activities or programs in any of the following: Culture, Education, Politics and/or Propaganda, and Religion.6

For the year 1980, the United Way of Portage County was involved in programs of 21 participating agencies. In detail, the 1980 monies were distributed among the following categories:

Figure 1. Distribution of 1980 United Way Funds

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This division into service categories has, however, been discontinued for the 1981 budget, since it was found to be confusing. Instead, for the year 1981, the Allocations Committee decided simply to provide an alphabetical listing of the agencies of the Portage County United Way during the allocations process.

Following is a list of the activities and agencies funded by the United Way of Portage County for 1980.

I. Youth Services

**Big Brothers/Big Sisters:** This program matches men and women with children of single parents to offer children physical, social and emotional support.

**Boy Scouts--Samoset Council:** Provides programs aimed at building character, teaching citizenship responsibilities and developing personal and moral fitness for boys ages 8 through 18 and young men and women 14 to 21.

**Central Wisconsin Environmental Station:** Provides for the study of ecological principles by area children, teachers, and other residents. Designed to promote knowledge and skills necessary to maintain and improve Central Wisconsin's environmental quality.

**Girl Scouts--Woodland Council:** Helps girls ages 6 through 17 gain skills and knowledge through participation in a leader-guided educational enrichment program.

**YMCA's Youth Program:** Helps area youth develop
character and skills, through swimming instruction, sports clinics, leagues, day camping, educational trips, gymnastics and other recreational activities. United Way dollars reduce cost of youth memberships.

II. Health Services

American Heart Association--Wisconsin Affiliate: Supports research and provides public education to help prevent death and disability caused by heart and blood vessel diseases. Conducts local programs in cardiopulmonary resuscitation, high blood pressure control, exercise and rehabilitation.

American Red Cross--Portage County Chapter: Provides services to disaster victims, counseling and communications aid to military families, the staffs and bloodmobile and offers programs in swimming, first aid, cardiopulmonary resuscitation and babysitting.

Arthritis Foundation: Helps individuals with arthritis and their families lead productive lives, works to raise awareness of arthritis treatment and control, and supports improved arthritis care and research.

Central Wisconsin Health Foundation: Brings improvements in Portage County's medical, diagnostic and therapeutic capabilities by utilizing memorial gifts and United Way funds to help purchase new health care equipment. Matches contributions with St. Michael's Hospital or area nursing homes.
Wisconsin Epilepsy Association: The Midstate Chapter provides direct information services, education and assistance regarding epilepsy.

III. Elderly Services
Meals on Wheels: Primarily a volunteer program, delivering hot, nutritional meals five days a week to elderly, handicapped or convalescing people. United Way dollars reduce meal costs to recipients.

Portage County Commission on Aging: Funding the Holly Shoppe. This provides an outlet for Portage County senior citizens to sell handicraft items and teach their crafts to children. United Way funds provide a shop manager.

IV. Family Social Services
CAP Services, Incorporated--Family Crisis Center: A shelter for domestic violence victims and an emergency shelter for Portage County residents. Also offers 24-hour information/referral service and crisis counseling.

Children's Service Society: Provides adoption services, single parent and child/parent counseling, foster care and parent training sessions.

Lutheran Social Services: Family and single parent counseling, adoption services, creative parenting classes, assertiveness training, sexuality and stress programs offered to county residents of all faiths.
Portage County Council on Alcohol & Drug Abuse: Provides information, outpatient counseling and referral services to persons with alcohol or other chemical dependency problems. Services also offered to family members, friends or employers of people with alcohol and drug problems.

Riverdale Marriage and Family Clinic: Provides pre-marriage, marriage and divorce counseling, family/individual therapy, unmarried parent services and adoption placements to county residents of all faiths.

Wisconsin Council on Human Concerns: Statewide voluntary association of citizens and organizations working to improve governmental and voluntary health and social welfare services.

V. Handicapped Services

Achievement Center for the Handicapped: It operates a program of individualized education for developmentally disabled children, from birth to age three. Plan includes a classroom program, along with home visitations.

American Rehabilitation Institute: Helps patients with chronic disorders and sponsors training workshops for professionals handling these problems. Also known as the Sister Kenny Institute.

Community Industries: Provides various rehabilitation programs for the physically, mentally, emotionally or economically handicapped. Helps these persons develop
employment skills or provides them with long-term sheltered employment.

The various programs do not remain the same every year. The selection of programs to be funded is based on the changing needs of the community of Portage County. Also, those agencies which may fail to meet the needs of the community as defined by the United Way of Portage County are dropped and others selected.
CHAPTER III

THE FORMAL STRUCTURE AND FUNCTIONS OF THE UNITED WAY OF PORTAGE COUNTY

In Chapter Two, I discussed the history, general functions, and current programs of the national and local United Way organization. This chapter will address the question of how the local organization is organized to perform its work, how the parts of the organization are assigned functions and are expected to relate to each other.\(^1\) It will then be possible in Chapter IV to examine how this structure, as a communication network, is actually used to achieve these goals.

This organization maintains an organizational chart which is designed to show the internal division of labor and official or formal relationship of the parts.\(^2\) As I can see from the organizational chart (Figure 2) the contributors are placed at the top of the chart. This is because the organization wishes to recognize the primacy of all contributors, to see them as the "owners" of the organization. The membership of the organization consists of all individuals, groups, associations, and business organizations who make a contribution to the organization, and they remain as members

\(^{1}\)Robert H. Hamlin, Voluntary Health and Welfare Agencies in the United States (New York, 1961), pp. 54-55. Stresses interagency relations, a process the UW uses in its external communication.

\(^{2}\)Ibid., pp. 54-55.
Figure 2. United Way of Portage County Organizational Chart

MEMBERSHIP
(Contributors)

EXECUTIVE COMMITTEE

BOARD OF DIRECTORS

EXECUTIVE DIRECTOR

STAFF

PLANNING COMMITTEE
Evaluation of Programs
Determination of Needs
Establishment of Priorities

Allocations Committee
Allocations
Admissions
Program Review
Agency Relations

CAMPAIGN COMMITTEE
Annual Campaign
Long Range
Cultivation

COMMUNICATIONS COMMITTEE
Public Education
Public Relations
Speakers Bureau
Media Releases
for a period of one year immediately following their contribution at the time of the annual fund campaign. In addition, each member of the Board of Directors automatically (upon election) becomes a member of this organization and remains a member of the organization during the term of service.

Once each year the Board sponsors a meeting of all the membership of the United Way; it is held in the month of January every year on a day determined by the Board of Directors. The agenda includes the annual report of the Board of Directors, election of new directors by the total membership, and any other business which needs to come before the membership as a whole. Special meetings of the members for any purpose may be called by a resolution of the Board of Directors, but can also be called by the President at the request in writing of one-third of the directors in office, or at the written request of one-third of the members of the organization. These requests, in any case, must state the purpose of the proposed meeting, and business transacted at special meetings must be confined to the subjects stated in the call.

**The Administrative System**

The operational structure of the UW (United Way) consists of two levels: the administrative group and the group of major committees.

**The Board of Directors**

The Board is the most powerful body of the organization.
All affairs of the United Way of Portage County are finally under the control of this body. The Board of Directors consists of twenty-four elected members whose staggered terms last for three years. The Board also includes the immediate past president as an ex-officio member.

Meetings of the Board of Directors are held at least quarterly, and additional meetings may be held on the call of the president or, if he/she is absent or unable or refuses to act, by any officer, or by any five directors. The duties of the Board of Directors are:

1. To manage and administer the affairs of this organization between meetings of the membership;

2. To adopt such policies and procedures for the operation of this organization as may be consistent with the bylaws and designed to carry out the purposes of this organization;

3. To appoint and supervise such committees as it may deem expedient for carrying out purposes of this organization;

4. To select, employ and evaluate such persons as it may deem necessary for the successful execution of the purposes of this organization;

5. To give, at least once a year, a full and complete report of its activities at a meeting of the members of this organization.

The Executive Committee

This committee consists of the president of the Board, immediate past president, vice president, secretary treasurer, executive director, chairperson for the Allocations Committee,

...From the literature of the United Way of Portage County, "Article II of the Bylaws of the UW of Portage County."
Campaign Committee, Communications Committee, Planning Committee, and two other members selected from the Board of Directors by the Board itself. This Executive Committee can exercise all the powers of the Board. It meets on call between the meetings of the full Board.

Executive Director and Staff

The executive director is appointed by the Board of Directors; they decide on the terms of employment—wages, hours, and benefits—for the executive director. These are all reviewed annually. The executive director is responsible for the general implementation of all the activities and programs of the organization in accordance with the policies established by the Board of Directors. The executive director is an ex-officio member of all standing committees of the organization and is responsible for all minutes associated with Board and committee meetings. The executive director has a staff of two full-time persons: an office secretary and an administrative assistant. These three persons are salaried; all others in the organization are unpaid volunteers.

The Committee System

Allocations Committee

This committee is composed of 15 members; some of them are also members of the Board of Directors; and others are
appointed from the general public. This policy of appointed members is also followed in the other committees listed below. This committee is responsible for all matters relating to, and recommends for Board approval:

1. The admission of organizations to the status of participating agencies of the United Way of Portage County;

2. The allocation of funds of the United Way of Portage County available for distribution to participating agencies. All funds allocated by this committee go to non-profit agencies.\(^4\)

3. Program Review

4. Agency Relations

Planning Committee

This committee consists of not less than five persons, including committee chairman. It supervises the following:

1. Evaluation of programs;

2. Determination of needs;

3. Establishment of priorities.

Their findings are also reported regularly to the Board of Directors.

Communications Committee

This committee consists of five to ten members, including the committee chairperson. The functions of this committee are:

\(^4\) Bylaws of the Portage County United Way.
1. To supervise and direct a year-round educational and publicity program, designed to inform the residents of Portage County regarding the social needs, the work of member agencies, and the services of the United Way of Portage County;

2. To encourage sound and intelligent support of the organization;

3. To work closely with the Campaign Committee to ensure visibility for annual fund drive.

**Campaign Committee**

The Campaign Committee is chaired by a fund drive chairman, who selects an assistant drive chairman. The drive chairman determines the number of persons needed in the campaign structure and designates the titles and responsibilities of the people so selected. The chairman directs and supervises all matters relating to the annual campaign conducted by the Portage County United Way, subject to supervision and direction by the Board of Directors, for the purpose of raising funds for the participating agencies. Sometimes, when the drive chairman thinks fit, an advisory committee within the Campaign Committee may be utilized. The structure of the Campaign Committee for 1980 is shown in Figure 3.

**The Main Functions of the Organization**

The main functions of the United Way are performed by the organization through the Board, the various committees,
Figure 3. United Way of Portage County, Incorporated, Campaign Committee

CAMPAIGN CABINET
Bob Taylor, 1980 Drive Chairman
Larry Mankin, Assistant Drive Chairman
Janet Newman, Communications Committee
Jerry Wojcik, Labor Representative
Cheri Smith, Executive Director
Paul Adamski
Sue Hall
Barb Roenz
Don Colby

LARGE EMPLOYER
(Over 200 emp)
Bob Taylor
Larry Mankin
Cheri Smith

COMMERCIAL &
INDUSTRY
(10 to 200)
Paul Adamski

SMALL BUSINESS
& SERVICES
(1 to 20)
Barb Roenz

EDUCATION &
PUBLIC SERVICE
Sue Hall
Dave Eckholm

PROFESSIONAL
COUNTY
Don Colby
Larry Mankin

MAIL
Bob Taylor
Larry Mankin
Cheri Smith

COMPANIES
American Potato
CONSOLIDATED
Consolidated
COPPS
Copps
JOERNS
Joerns
ORE-IDA
Ore-Ida
PLOVER PAPERS
Plover Papers
ST. MICHAEL'S
St. Michael's
SENTRY
Sentry
SOO LINE
Soo Line

LOANED EXEC
Minnie Andreae
Dan Bledsoe
Bob Busch
Marge Coker
Jim Corbet
Sue Decker
Mike Disher
Molly Diedrich
Mike Inglis
Pat McGinley
Steve Menzel
Tom Mrozinski
Chris Northwood
Ken Rentmeester
Karon Ruch
Raid Stangel
Cal Stankey
Jerry Twit
Mary Zagzebski

TEAM CAPTAINS
Jim Cole
Gerry Milkowski
Mary Self
Bob Nygaard
Lynn Olsen
Mary Fieweger

TEAM CAPTAINS
Barb Krieski
Jan Kuml
Bill Kind
Brother Dominick
Ruth Pierce
Mike Haborman
Chuck Reilly
Linda Nash
Rita Lynch
Tris Lahti

TEAM CAPTAINS
Mike Schmidt
Ron Skrenes
Marcia Schneeberger
Dave Roman
John Bohl
Elmer Timm
and the executive director and the staff. The executive
director's main coordinating functions are to provide profes-
sional direction and assistance to the community of Portage
County in developing and monitoring a network of voluntary
human care services through a United Way fund-raising effort.
The main functions of the United Way, therefore, operate in
an annual cycle of assessment of community needs, campaigning
for funds, allocation of funds and monitoring member agencies,
assisting in and seeking cooperation between member agencies,
and maintaining a year-long publicity and public education
program.

Assessment of Needs

This function is performed by the Planning Committee,
but is also a function of the Allocations Committee. The
Planning Committee supervises the ongoing assessment of needs
for human care services and potential solutions to human prob-
lems in the community. To be able to assess needs effectively
and efficiently, the Planning Committee tries to measure com-
community attitudes regarding services provided by participating
agencies, and also assists in gathering data for the develop-
ment of new programs or the expansion or modification of
existing human service programs. The findings of this commit-
tee are reported regularly to the Board of Directors and to the

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5 Volunteer Readership, Planning, for a Change: A Citi-
zen's Guide to Creative Planning and Program Development.
(Boulder, 1980), pp. 7, 11, 17. The assessment of needs which
is considered an important aspect of the UW is also discussed
in this text.
Allocations Committee, assisting the latter in their deliberations. In brief, this committee serves as a vehicle for continuously assessing the human service needs of the Portage County community. For the year 1980, the Planning Committee used a survey of contributors to collect data to determine the needs of the community (see Figure 4).

Admission of New Agencies

The Board of Directors, through recommendations from the Allocations Committee, prescribes from time to time conditions for the admission of agencies to the status of participating agencies and for the regulation and termination of such status. 6

Allocation of Funds and Monitoring of Agency Operations

The allocation of funds to participating agencies is also a difficult function to perform. Here it may be briefly noted that only non-profit local health, welfare, and recreation agencies may be admitted. It should also be noted that these agencies commonly have other forms of income--from fees charged, from government funds, from grants of various kinds, etc. Currently only a few member agencies are almost totally supported by the United Way; the issue for the United Way is to determine where, beyond existing private and government programs, the United Way funds can best be placed to supplement existing programs to best meet community needs. Clearly, the United

6 A copy of the detailed criteria for admission and an application form for admission are attached as Appendices I and II.
United Way is your organization! Won't you share your view points with us?

CIRCLE THE CATEGORY THAT APPLIES:

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<thead>
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<tbody>
<tr>
<td>1. The need for youth service is:</td>
<td>NEEDS CATEGORIES</td>
<td>Lo</td>
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<td></td>
<td>Your comment</td>
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<td>2. The need for marriage, youth, etc. counseling is:</td>
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<td>Your comment</td>
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<td>3. The need for health service is:</td>
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<td>Your comment</td>
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<td>4. The need for disaster assistance service is:</td>
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<td>Your comment</td>
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<td>5. The need for handicapped services is:</td>
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<td>6. The need for elderly services is:</td>
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<td>Your comment</td>
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<td>7. Other needs:</td>
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Way will wish to avoid duplicating existing programs which are already meeting local needs, and to avoid admitting agencies whose work must be privately funded (political or religious organizations) or which should be government funded (educational or public "utility" organizations) or which are in fact private business functions (day care centers for children of upper or middle class working mothers). Although different, the first three functions are interacting or reciprocal:
(1) the assessment of community needs not being fully met;
(2) the admission of new agencies capable of meeting those needs or supplementing other programs to meet them more fully; and (3) the allocation of campaign funds among the agencies.
It requires decision-making on the part of volunteers as to:
(1) which services are of higher or lower priority; (2) which agencies best meet, or are performing most effectively to meet, these priorities; (3) how scarce money can be divided among member agencies, all of whom want and could well use additional funds. The Allocations Committee coordinates its decision-making based on the assessment done by the Planning Committee and by its own evaluation of agency performance. It uses planning surveys as a tool in deciding agency allocations. A copy of last year's survey form (Appendix II) illustrates one of the processes carried out by the Allocations Committee to arrive at its decisions. Ultimately, the Board of Directors must approve the recommendations of the Allocations Committee, and participating agencies are bound by such allocations. (There is a careful appeal procedure as well. See Appendix I, page 82.)
**Figure 5. Quarterly Report**

SUBMIT ONE TYPED ORIGINAL 15 DAYS AFTER PERIOD ENDS

<table>
<thead>
<tr>
<th>AGENCY</th>
<th>AGENCY'S FISCAL QUARTER</th>
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<table>
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<tr>
<th>INCOME</th>
<th>YEAR TO DATE</th>
<th>ANNUAL BUDGET</th>
<th>BALANCE OF BUDGET</th>
<th>EXPENSES</th>
<th>YEAR TO DATE</th>
<th>ANNUAL BUDGET</th>
<th>BALANCE OF BUDGET</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Contributions</td>
<td></td>
<td></td>
<td></td>
<td>16. Salaries</td>
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<td>2. Special Events</td>
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<td>17. Employed Benefits</td>
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<td>3. Legacies &amp; Bequests</td>
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<td>18. Payroll Taxes, etc.</td>
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<td>4. Other Public Support—Direct</td>
<td></td>
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<td>19. Professional Fees</td>
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<td>or Indirect</td>
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<td></td>
<td></td>
<td>20. Supplies</td>
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<td>5. Allocated By Other United Ways</td>
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<td></td>
<td></td>
<td>21. Telephone</td>
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<tr>
<td>6. Fees and Grants from Gov’t Agencies</td>
<td></td>
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<td>22. Postage &amp; Shipping</td>
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<td>7. Membership Dues from Individuals</td>
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<td>23. Occupancy</td>
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<td>8. Dues from Local Member Units</td>
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<td>24. Rental &amp; Maintenance of Equipment</td>
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<tr>
<td>10. Sale to Local Member Units</td>
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<td></td>
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<td>26. Travel</td>
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<tr>
<td>11. Sales to Public</td>
<td></td>
<td></td>
<td></td>
<td>27. Conferences, Conventions, Meetings</td>
<td></td>
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<td>12. Investment Income</td>
<td></td>
<td></td>
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<td>28. Specific Asset to Individual</td>
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<tr>
<td>14. Miscellaneous</td>
<td></td>
<td></td>
<td></td>
<td>30. Awards and Grants</td>
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<tr>
<td>Portage County United Way Allocation</td>
<td></td>
<td></td>
<td></td>
<td>31. Miscellaneous</td>
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</tr>
<tr>
<td>15. TOTAL INCOME</td>
<td></td>
<td></td>
<td></td>
<td>32. Dues to State or National Organization</td>
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</table>

**UNDUPLICATED COUNT OF PROGRAM BENEFICIARIES FOR QUARTER**

Stevens Point, Park Ridge, Whiting
Junction City
Custer, Polonia, Rosholt, Amherst

Other Pertinent Statistics (Normally generated by agency and deemed to be of interest to the United Way):

---

Plover, Almond, Bancroft
Not Known
TOTAL
If Available and If Applicable

**FOR OFFICE USE**

**MALE**

---

**FEMALE**

---

Stats Check
Committee Ch
The responsibility of the Allocations Committee does not end with the admitting of new agencies and the allocating of money; it must also be sure that the money being allocated is utilized effectively within the agency. This monitoring function involves a quarterly review of each agency's financial and service reports (see Figure 5 for quarterly report form). The Allocations Committee, during the performance of this function, must at times take the adversarial role—and at times the supportive role. It is only through a continuous exchange of communications with the funded agencies that the committee and the whole organization become effective.

Coordinated Efforts With the Funded Agencies

To generate more public information regarding agency activities, the committee members contacted representatives of all member agencies to offer encouragement and help in promotional or public information activities. Some agencies take advantage of this offer (for example, the Boy Scouts requested the committee's student writers to prepare news releases promoting a local event in 1979).

As a result of these activities, along with excellent continuing coverage by local news media, success was achieved in the campaign. In 1979, 18.1% more money was raised than in the previous campaign, which was 8.3% over the 1979 campaign goal.


The Planning Committee has also used other processes to assess the priority needs of Portage County residents. In 1979 a contributors survey was carried on the back of the campaign pledge card. The pledge card is a means for people to give through several options (see Appendix IV). In this survey, the residents (contributors) were asked to indicate whether the needs for certain services were low, medium or high. This survey was later returned to the United Way office for assessment by the Planning Committee (see Appendix VI for Contributor's Survey). Another method for assessing needs was a more elaborate contributors survey conducted through interviews. This was the Key Informant Survey in 1979 (see Appendix V).

The decision-making process for fund allocations is a difficult process. Before the allocation of funds is completed, the participating agencies are requested by the UW to submit their budget requests. When received, these budgets are then reviewed and screened, based on the needs of the community, by the Allocations Committee. All allocations to participating agencies are made in four equal quarterly payments (unless variation has been mutually agreed upon), provided the member agency is not in violation of policies stated in the principles of participation.

Whenever the Allocations Committee recommends a lesser allocation than requested by the member agency, the agency is

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9Newton Margulies and John Wallace, Organizational Change Techniques and Applications (Glenview: 1973), pp. 75-79.
notified in writing. If the agency wishes to take exception to this recommendation, it must do so within ten days of the notification, by presenting additional information to the Allocations Committee. If the committee sustains the recommendations, it shall so report to the agency in writing, and carry this sustained recommendation to the Board of Directors.

As a further appeal, the member agency may request a review by the United Way Board within ten days after the Board has approved the Allocations Committee's recommendation allocation. Its reasons for such an appeal should be clearly stated. Action on the recommendation by the United Way Board shall be final.

Each year, the United Way and its member agencies mutually agree to abide by selected principles and budget amounts, and a Memo of Understodng is signed between the UW and its participating agencies (see Figure 6).

The basis for funding volunteer organizations such as the United Way is an important thing to be considered while setting up a voluntary and non-profit organization in both urban and rural communities. Portage County has handled the funding issue with tact. Residents of the county who contribute or want to contribute make up about 15% of the total residents of the county. Of this number, about 75% of the contributions are from individual residents of the county, while the rest is from businesses.

10 Appeal process (Literature of the Portage County United Way).
A MEMORANDUM OF UNDERSTANDING

BETWEEN

____________________ AND UW of Portage County, Inc.

ALLOCATION

____________________ accepts the allocation of

____________________ from the United Way of Portage County, to be
allocated in 1980, contingent upon reaching the total drive
goal of $292,996 for the 1979 United Way of Portage
County Campaign.

The _____________, as a member agency of the United Way
of Portage County, agrees to abide by the attached Principles
of Participation in the United Way of Portage County.

Agency payment should be made ________ if possible.

Signed this _____ day of _____ 1979

Agency Representative __________________________ United Way Representative __________________________

Title __________________________ President Title __________________________
Nevertheless, for the year 1981, Portage County United Way proposes to spend the sum of $335,274. The money which still has to be raised during the fund drive in October, 1980, shall be distributed as follows:

- Achievement for the Handicapped: $7,500.00
- American Red Cross: $34,000.00
- American Rehabilitation Center: $1,000.00
- The Arthritis Foundation: $1,000.00
- Big Brothers/Big Sisters: $10,500.00
- Samoset Council Boy Scouts: $18,000.00
- Family Crisis Center: $10,000.00
- Central Wisconsin Environmental Station: $4,750.00
- Central Wisconsin Health Foundation: $7,000.00
- Children's Service Society: $4,000.00
- The Holly Shoppe: $8,000.00
- Community Industries Corporation: $17,500.00
- Portage County Council on Alcohol & Drug Abuse: $26,500.00
- Woodland Council Girl Scouts: $18,000.00
- Lutheran Social Services: $6,600.00
- Meals on Wheels: $8,800.00
- Portage County Mental Health Association: $21,000.00
- Riverdale Marriage & Family Service: $21,500.00
- The Wisconsin Epilepsy Association: $8,300.00
- Stevens Point Area YMCA: $46,000.00
The 1980 receipts of $292,996 was $24,000 more than the original goal. For the 1981 budget, the Board of Directors approved $49,610 for local United Way overhead and operations. This amount makes up 14.8% of the United Way goal. If the residents decide to contribute this money, it will be based on the amount of returns or service which the community feels they receive from the United Way towards their health and social needs.

Although the level of contributors in the County has risen to only 15% of its total residents, they have been able to meet many of their community needs. This has been true because of the commitment that exists among the volunteers that serve in the UW of Portage County. During the 1980-81 admissions and allocations sessions, the Allocations Committee alone put in over 300 man-hours in deciding which agencies were to be funded and by how much.

**Assistance to Member Agencies**

The recently established "agency forums" and other measures are also used to assist the various committees, as well as the agencies themselves, to perform more effectively (see Chapter IV). During 1979, the principles of admission and participation were separated into two documents and re-stated, in an attempt to more realistically meet the needs of participating agencies as well as the needs of the United Way. The interagency forums were conducted to provide an opportunity for input from the agencies, interaction between agencies,
interaction between agencies and the United Way. The hope is that continued communication of this nature can lead to an improved allocations process and better management of agency services.

The agencies being funded by the United Way are assisted by the various offices of the UW in other ways as well. Last year, UW offered the following assistance to its member agencies:

1. The executive director provided a system of continuous assessment and monitoring of United Way agencies and of community economics, to assist the Board of Directors in setting a realistic campaign goal in line with the community potential, and in allocating monies prudently;

2. Training opportunities were provided for human services personnel and volunteer Board members through Volunteer Board Workshops which help the boards of various participating agencies to perform their responsibilities;

3. Other assistance was given to member agencies through occasional meetings of agency heads, where interagency relationships were encouraged and a cooperative climate set for all participating agencies;

4. The executive director of the Portage County United Way works with the Boards of Directors of non-profit agencies (both participating and non-participating) on strategies to raise supplemental funds for the agencies. The recommendations of the
executive director of the United Way are not binding upon the agencies.

Educating the Public

The processes used by the Communications Committee are both year-long and in the campaign itself. The community of Portage County needs to know why their support is important to the United Way. To have this done effectively, the Portage County United Way--through the Communications and Campaign Committees--had used the following communication activities to properly inform the public and so engender public support: 11

TV and Film: Several filmed spot announcements were produced cooperatively in a four-county United Way television promotion, and aired throughout the year, with stepped-up activities during the months of the campaign drive. Also, additional local TV coverage was obtained in 1978 with TV 7 filming the campaign kickoff and the sponsorship of a "Good Morning America" show for the drive chairman and assistant drive chairman. The UWSP campus TV also featured the drive chairman and assistant on a UW television show.

Radio: Public Service was received year-round from WSPT/WXYQ and WWRW/WFHR. At campaign time, special spots were arranged, such as "fair share givers," agency representatives, beneficiaries, etc.

11 Robert H. Hamlin, Voluntary Health and Welfare Agencies in the United States (New York, 1961), pp. 54-55. The system in the UW of Portage County has been designed in the same way.
During the 1978 and 1979 campaigns, advertising was set out as usual, and coordinated work took place on eight agency feature articles for the Stevens Point Daily Journal and the Tomorrow River Times, as well as an article in the Almond Village Herald; weekly news releases were placed in the Stevens Point Journal on campaign progress and promotional events (kick-off event, McDonald's Day, United Way Sunday, Goal Achievement); sponsorship obtained for fair share advertising; assisted in development of an article on United Way history for the front page of REACH (newspaper publication).

**Slides:** Work on updating of slide show, including script rewrite and production of multiple copies; slide sets were also distributed among industries in the community. Talks by campaign volunteers were also of some significance in campaign drives. Campaign leaders held meetings all over the community to educate residents on the activities of the United Way, stating some of the special services carried out. For the 1978 campaign, some of the areas addressed by campaign leaders included: the Rosholt Lions Club, Kiwanis and Rotary; by the executive director to MSTI, Sentry Insurance, UWSP, the Plover/Whiting Lions and Lionesses, a Christian service class at Pacelli High School, and Newcomers Club, just to mention a few.

**Speakers Bureau:** In order to provide United Way information to local groups all year long, the United Way
organized a Speakers Bureau. Through the bureau, a pool of individuals willing to address local groups was established. Speakers were provided with a basic orientation, including sample presentations, reference and handout materials, slide presentations, etc., depending on their needs.

Annual Meeting of Members: The purpose of this meeting was for the election of new Board members and recognition of retiring members. The committee also worked with the staff of the United Way to expand the January meeting of the approaching year to generate greater public interest and participation. To do this, the program planned has often included dinner, featured speaker, entertainment and award presentations.
CHAPTER IV

THE PROCESSES OF COMMUNICATION IN THE
UNITED WAY OF PORTAGE COUNTY

The Study of an Organization as a Communication System

The materials collected and reported in Chapters II and III can stand alone as one kind of description of the United Way, but they do not fully describe the nature of the communication processes which typically occur in the actual operation of that organization. That is the task of this chapter. The effort here will be to describe how various forms and types of communication are characteristically used to perform the functions of that organization, to describe the communication behaviors\(^1\) of its members as they try to achieve their individual and organizational goals.

By definition, an organization is a number of individuals performing a variety of specialized tasks who must interact both among themselves and with others outside the organization in order to achieve their shared goals. Other things being equal, it is the quality or effectiveness of that interaction which determines the relative success of the organization. This interaction or coordination among members of an

\(^1\)Robert H. Hamlin, Voluntary Health and Welfare Agencies in the United States. (New York, 1961), pp. 29-33. Discusses communication behavior suitable to organizations such as the UW of Portage County.
organization takes place through a wide variety of types, forms, and situations of communication. Thus, organizational communication is the study of how these various interactive communication events are typically performed in the course of pursuing the organization's work.

Such interaction will occur in several kinds of message exchange: typically, informal dialogue, small group decision making, written and oral requests and replies, and mass media messages and feedback make up most of the processes of organizational communication.² It would be possible, of course, to focus this study on the nature or quality of each of these forms or types of message exchange, but that is not the primary purpose of this thesis. Instead, the task of this chapter will be to describe some of the ways in which these collective forms of communication are used to perform the substantive functions of this particular organization—such tasks as assessment of community needs, allocation of funds, implementing plans for the fund raising campaign, etc.³

As briefly described under "method" in Chapter I, this descriptive approach requires us to ask what rules and norms for communication develop around or make up this structure of interaction; who talks to whom about what in which circumstances, and what are the characteristic ways of supplying


³Ibid.
information, making decisions, planning and supervising work, etc. In the vocabulary of organizational communication we are attempting to: (1) describe the uses of vertical and lateral, or informal and formal, and of internal and external communication in the interaction network of the organization; and (2) simultaneously describe the characteristic or typical processes of interaction as they provide for information flow, planning and supervision, and decision making.

Clearly, these communication processes are performed differently in every organization; it is the characteristic usage of them which gives any organization its unique nature. Our task here is to describe the ways in which the United Way of Portage County performs these communication processes in pursuit of its functions as described in the last chapter. Not every aspect of the total communication system of the UW can or should be reported. We shall, therefore, report on certain selected aspects of their communication system which seem most significant in understanding it.

Each of the elements in the communication system of the UW could be analyzed and reported separately, but such a procedure would not produce a realistic picture of the organization as a total dynamic ongoing process. We need to see the system (all its parts interacting) at work in typical situations. Therefore, the remainder of this chapter will be presented in two parts: First, a narrative description

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of three different typical situations in which various parts of the organization interact in carrying on its work. Then, second, a selected set of generalizations, drawn from these and other situations, to characterize the communication system as a whole. In the next and final chapter, we shall attempt to identify some characteristics of communication in the United Way which may turn out to be true of many volunteer organizations of various kinds. And we shall venture some estimates about the transferability of this cooperative approach to community organizations to the Republic of Cameroon (or other developing countries).

A Report of Three Typical Communication Situations

Admitting a New Agency: The Day Care Center

The Day Care Center had previously been a participating agency of the United Way; it had been provided with "seed money" to get started. Later the United Way felt that the day care center did not fully meet all the principles of participation as required by all member agencies; the funding from the United Way was terminated. The decision was made that the agency should not permanently receive United Way aid.

Over five years after the funding of the Day Care Center had been terminated, it ran into more serious financial problems and looked again to the Portage County United Way for help. The Day Care had a paid staff with a volunteer board.
Its main job was to take care of the children of working parents, and it was one of the 10-15 other Day Care Centers in the country. State certification was required in order to function, and in meeting minimum standards, its most acute problem was money. The Day Care Center had just purchased a new building to house its operation and so had immediate capital and cash flow problems. In order to increase income, the Center wanted to establish a drop-in program for residents of the county—child care for short periods during the day so that parents could go shopping or other activities. They did not wish to raise prices, but the charge made for each child was not enough to cover costs and provide for capital needs. This situation caused the Day Care Center to look to the United Way for help, and it applied for readmission as a member agency.

The director of the Day Care Center first contacted the executive director of the United Way to tell her of their desire to apply for membership as a participating agency; their discussion was exploratory and informal in nature. The director of the United Way indicated that she did not believe the Day Care Center was eligible for membership, but at the end of the first meeting, she provided the Center director with a copy of the application for membership and a set of the new criteria for membership. The application form was later completed and returned to the office of the Portage
County United Way. Presumably, from outside sources, the center director felt she could secure membership. This application, together with other applications, were then forwarded by the executive director to the Allocations Committee. These applications must be received by the United Way by or before February of each year. In March the Allocations Committee met to consider all pending applications for membership, and at that meeting the application of the day care center was reviewed. One of the first questions was whether or not the Day Care Center provided a service vital to the needs of the residents of the county. Further discussion followed, but to complete the review of the application, members of the committee wanted to visit the Day Care Center to see for themselves how things were being done. While there, members of the Allocations Committee talked to members of the volunteer board and to the paid staff, they had special conferences with the leaders of the center, and they examined some of the center records to establish whether this was a volunteer and nonprofit agency.

During the admission discussion on the Day Care Center, there was much interaction between the members of the Allocations Committee—both in and outside the meetings. There was, of course, input from many interested citizens and groups to the committee members. The committee had great difficulty trying to decide whether to admit the day care center or not. There were two schools of thought regarding the admission. There were some members of the committee who
strongly favored the admission of this agency because low income working residents of the county would benefit from its services. There were others who felt the services of this day care center were a private business venture, charging fees for services which people could and should pay for privately. They felt it would not be an easy task for them to explain to the membership why the Day Care Center was to be funded as charity when it would charge fees for services, even with UW aid; others felt this situation was also true of other agencies now being funded. After a long debate among the members of the Allocations Committee, they voted not to admit the Day Care Center because most of them felt that admitting this center meant establishing a policy which would require admitting the other 10-14 Day Care Centers also operating in the county, or place them in a position of funding an agency which duplicated services elsewhere available. The vote was 8 to 5, and much uncertainty remained. Thereafter, the committee's recommendation was forwarded to the Board of Directors.

During the next Board meeting, the Allocations Committee presented its recommendation. The Committee stated the reasons, pro and con, why this decision was taken. At the end of the discussion, the president of the Board of Directors called for a vote by the members of the Board to accept or reverse the recommendations of the Allocations Committee. By a simple majority, the Board of Directors made the final decision not to admit the Day Care Center as a participating
agency. They based their decision on the reasons given them by the Allocations Committee which, in the absence of other pressures, seemed legitimate. It seems clear, however, that this issue will re-appear, and may affect future allocations.

Determining Priority in Agency Funding: The YMCA

There is a clear need to maintain public support for campaign funding. To accomplish this effectively, the United Way uses both the Campaign and Communications Committees. The Communications Committee activities are year-round, making sure that people are informed of the day-to-day activities of the United Way. The media are regularly used to keep county residents aware of agency programs, meetings, workshops and conferences. They also keep the residents informed of any changes in the organization.

The Campaign Committee becomes most active during the fund drive. This drive occurs at the beginning of October, when members of the Campaign Committee and the campaign teams circulate in the county to secure contributions. The Communications Committee also intensifies its work at this time.

During a recent campaign drive, special problems arose in the organization. The problem became evident when many contributors within the community did not want the YMCA to be allocated additional funds. Some contributors felt those who enjoyed the services of the agency should pay for them rather than seek an increase in its annual UW funding. As
a result of feedback from a cross section of the residents toward the funding increase for the agency, the Board of Directors felt it was necessary for them to do something before the situation became worse.

As the attacks increased on the executive director and members of the Board by residents expressing their resentment towards increased funding for the YMCA, the United Way began to step up its external communication. They organized programs to educate the community on how decisions involving allocations of funds to participating agencies were being made by the organization. Public service announcements were made over the radio and television by the Communications Committee. The Speakers Bureau increased its effort to educate the public on specific issues such as the YMCA.

The Board of Directors of the United Way became increasingly disturbed by the many protests from residents of the community, and the executive director--both by phone and personal contact--had become aware of the protests. They decided to call in the chairmen of the Allocations and of the Planning Committee. The Planning Committee collected data from the community to see how many people did or did not favor the increased funding of the YMCA and why. The Planning Committee then met to reassess the needs of the community and made recommendations to the Allocations Committee and to the Board of Directors. The Allocations Committee

5Phone calls and private discussions.
met to review the allocations of the member agencies, and to public reaction, the allocation to the YMCA was reduced. A further survey indicated that the agency was not among the top five organizations considered to be of highest priority in Portage County. In addition to cuts in the allocation to the YMCA, increases for the purposes of expansion were made for the five top agencies. These agencies included: Meals on Wheels, Portage County Council on Alcohol and Drug Abuse, Community Industries Corporation, the Holly Shoppe, and the Achievement Center for Handicapped. These recommendations of the Allocations Committee were taken to the Board of Directors by the chairman of the Committee for approval.

The Campaign and Communications Committees stepped up their activities to increase public awareness of these actions. Slides, film shows, and public service announcements were run. The campaign chairman, the assistant chairman and the campaign teams stepped up their communication process through visits to various areas within the county. Some of these included visits to Sentry Insurance World Headquarters, the UWSP community, etc. In each of these areas, they informed the public of total UW programs, and emphasized the receptivity of the UW to community input. Overall, the results seemed to be effective; at least, the more recent fund drives have been increasingly successful since these efforts.

Managing Agency Relationships: The Youth Programs

Two kinds of member agency relationships are of importance
to the UW: (1) between the UW itself and each of the agencies, vertically; and (2) between the various agencies laterally.\(^6\) In the first area, the UW tries to make clear to the member agencies and to the public that each agency retains its operational autonomy even though the UW provides it with monetary support. Very few agencies are totally supported by UW; most of them have other sources of income and are not totally dependent on UW for their existence.

Still, as described in Chapter III, UW does require a careful screening to meet UW criteria before admitting them, requires annual memos of agreement, and uses detailed reporting and monitoring methods to assure that the member agencies continue to operate within the established criteria and operate with reasonable effectiveness in meeting the community needs.

In this UW-to-agency relationship, as noted earlier, both the executive director's office and the Allocations Committee will operate supportively at some times and adversarially at others. Clearly, the member agencies should not be "controlled" by UW in internal program or budget matters, but still UW is to some degree accountable to its public contributors for the actions of its member agencies in meeting community needs. It is also committed to assisting them in all possible ways to operate as effectively as possible.

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The second relationship, between the agencies laterally, should clearly be cooperative rather than separatist or competitive. This is one of the major advantages of the cooperative funding approach; since they need not compete for contributions (although they may for allocations) they are free to support each other's programs, and to join in solving common problems.

One example of communication processes in the United Way to manage these two sets of relationships is found in the youth programs. The potential for cooperative relationships can easily be observed in the programs of Boy Scouts, Girl Scouts, Big Brothers/Big Sisters, and the youth programs of the YMCA and the Environmental Station. There is a clear need for these programs to supplement rather than duplicate each other, and sizable cooperation is possible in such areas as cross-referral of clients, recruitment and training of volunteer leaders, mass media promotion, avoidance of schedule and project conflict, etc. There is also need for mutual support between these youth programs and other agencies (e.g., alcohol and drug abuse). Further discussion of interagency communication will be included in the next section of this chapter.

**Characteristics of the United Way**

**Communication System**

The preceding description of typical communication
situations in the work of the United Way organization makes clear the wide variety of forms and types of message exchange which commonly occur. It also reveals some aspects of channel or network usage and of processes for information flow, decision making, and supervision. Using these examples—and others observed in various situations—our effort must now be to draw some conclusions about the characteristic communication processes used in this organization. Obviously, almost no general statements can be made about these processes without leaving room for a large number of exceptions, but some fairly common patterns do emerge. It must be emphasized that the following generalizations are directly derived from observation of actual message exchanges, communication events.

**Internal Communication Relationships**

The entire set of complex internal functions of the United Way seem to arrange themselves into two areas of work: raising money through the annual campaign or rund drive, and managing the UW/member agency relationships (admission, allocation, monitoring, agency cooperation, etc.). In some ways, the UW can almost be viewed as two closely related volunteer organizations.

The campaign operates with a large number of community leaders, carefully structured to represent every significant socio-cultural economic segment of the county population.
(see Figure 3 on page 27). In a sense, these leaders organize themselves once a year for a short burst of highly intense effort—and then depart. They are usually competent, highly placed in the area they represent, highly visible in the community, and strongly motivated (in various ways) to achieve the fund-raising goals. A few of them move into the short-range cycle of a division chairmanship, to assistant drive chairman, and to drive chairman. Some others return each year in about the same status position in the campaign hierarchy, but there is—as in all volunteer organizations—a sizable personnel turnover, especially in the key positions since they are so demanding and time consuming. While we can assume sincerity and honest community commitment from them, one gets the feeling that they do not in fact exhibit very much long-range responsibility for making the overall organization achieve its goals in the county; they almost seem to raise the money gladly and effectively and then say, "Ok, there's your money. Now do something useful with it."

At this point, the other side of the organization must do just that—accept the task of establishing and implementing long-range community goals.7

Among many exceptions to this general pattern, the main one is illustrated by the second situation described above (the YMCA). When problems occur in the program or allocation area, the campaign process of raising money may be immediately

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affected, and lateral communication will occur to resolve those problems between the Board, the other committees, the executive director's office, and the key people in the Campaign Committee. Still, the likelihood remains that the Board and other committees seem to feel a different kind of long-range responsibility to the organization than does the shorter-range campaign group. They have to stay and clean up after the party is over; they live in the house all year. In this sense, the communication patterns of vertical and lateral message exchange are clearly affected; especially, lateral communication between the Campaign Committee, on the one hand, and the Board and other committees, on the other hand, is smaller in quantity and of a different nature than the communication among the Board and other committees.

Information and Decision "Focal Points"

One way to describe internal communication systems is to identify "focal centers" in the organization, points where many lines of information flow/converge, and where more key decisions seem to be made. Three such points appear in the United Way, in a pyramid form: the Allocations Committee, the Campaign Cabinet, and the Board to whom the other two must report. These three points then converge on the executive director.9


9 From my personal observation, Cheri Smith is immensely tactful and she and her assistants are the only full-time, paid professionals in the organization, the main suppliers of
Although the UW organization chart\(^9\) indicates that all four major committees report separately and directly to the Board, this does not in fact seem to be the case. The work of the Planning Committee (assessment of community needs) seems to lead them to operate as consultants to the Allocations Committee rather than to perform an independent function. The Communications Committee seems to be: (1) a kind of support service to the Campaign Committee during the weeks of the campaign; and (2) a support service to the executive director for year-round public education and public relations. No one in the organization seems to perceive any structure problem in the functioning of the Communications Committee, but there is still some concern about clarifying the operational functions and increasing the use of the Planning Committee.

The Process of Assessing Community Needs

The Planning Committee came into existence only four years ago; its functions, where they existed, had earlier been performed by the Allocations Committee. The reason for

\(^9\)continuity, the main sources of information, and the main impetus for interaction among the parts of the organization. In this role she operates in all three of the above focal points, rather than to absorb the decision making power from them into her own office.

\(^{10}\)Organizational chart of the United Way, page 21.
concern for the Planning Committee function, although not generally understood in the organization, rests squarely on the problem of how to assess community needs. Clearly, the reason for the existence of the United Way is more than the convenience and efficiency of a single fund drive to support a number of local service agencies. The UW is indirectly saying to the county population, "Look, we are your elected representatives to see to it that all your money contributions are spent not only efficiently but wisely, where they are needed. We are the trustees of community needs; beyond what you can buy in the market or get from government, we must help you identify what is left that we most need to do." In that sense, identifying unmet needs, setting priorities among them, and discovering how best to program to meet them, would seem to be the most important functions of the UW. United Way contributions cannot responsibly be spent simply for whatever some existing local agencies want to do. The very difficulty of setting criteria for admission or continuance of member agencies reflects the need for the Planning Committee function. This function seems to be over and beyond the Allocations Committee's function of determining the relative annual budget needs of member agencies and monitoring them for efficient operation.

This problem may be the most critical communication task of the UW organization. Currently the survey device is being used to help in determining relative priorities among community needs: a survey of contributors by having them indicate
program or agency preferences on their contribution form. Such a survey seems clearly vital for getting feedback on contributor attitudes and satisfaction with current funding and allocation policies. Obviously, UW cannot ignore contributor preferences and expect to continue to get contributions, but there remain serious questions about the validity of this measure of real overall community work—very few contributors are even aware of the nature of the programs of many of the funded agencies, and even fewer possess the information or perspective to make an overall balanced judgment of current and changing community conditions in health, recreation, and welfare in the county. It would seem that neither the Planning nor Allocations Committee can ultimately depend on contributor preference surveys as the sole basis for funding decisions.

Other surveys in greater depth have been made among the general public, among the member agencies, and inquiry continues among government and non-member agencies in this effort to assess community needs. However, it would now appear that a serious long-range effort should be made by the Planning Committee to develop a system of methods for assessing changing needs in the community as a function separate from—but related to—the allocations tasks. (It is our understanding that the organization now proposes to do something of this kind.)\footnote{Based on discussions with the volunteers and the executive director of the United Way.} In any event, from a communication
point of view, this may be the most significant conclusion about their current process.

**Characteristics of Volunteer Management**

Interviews with various key personnel in the UW produced several communication characteristics related to the operation of a volunteer organization. Often, they report, the various committees function well within themselves but fail to perform sufficient lateral communication with other groups and committees to provide effective coordination of the total organization. Thus, the executive director is left with the overwhelming task of attempting to move the necessary information among them or to bring together representatives to discuss policy informally. This difficulty in motivating volunteers to perceive and work toward larger shared goals of the total organization will be further discussed in Chapter V.

A related problem is the delegation and follow up on detail tasks. Often the decision making and planning are done effectively, but then volunteers return to their full-time jobs and the necessary follow-up administration is delegated either to unsupervised subordinates or the executive director's staff. As the organization grows in size and expanded functions, the staff is unable to perform this much follow-up supervision. Such an administrative task is further complicated by the lack of staff "control" over volunteer supervisors; a business corporation can exert considerably greater pressure on "middle management" for
accountability, while a volunteer organization must depend on the sheer strength of individual motivation among volunteers. This problem is clearly evident as one observes the nature of message exchange in vertical supervisory communication in the UW; it is again very different in tone from business supervision communication.

Communication With Member Agencies

As noted earlier in this chapter, the UW must maintain a difficult balance in its relationship with member agencies. On the one hand, UW must monitor the agencies for effective use of the funds provided and, on the other hand, must work to assist and support the work of the agencies and to increase interagency cooperation. The importance of agency autonomy and the necessary accountability are difficult to combine.

To improve interagency cooperation, the United Way of Portage County has used agency forums as a communication process for discussing mutual problems, interests, etc. These forums are a critical point of communication between agencies and between them and the United Way. During the forums, all agencies bring their own problems to the floor. Solutions to these problems are attempted collectively; this helps other agencies with similar problems. During these forums,

12John Fisher, How to Manage a Nonprofit Organization. Volunteer Management Association (Boulder, 1978). This stresses the need for organizations to monitor their performance.
interaction between member agencies and the professional staff of the United Way is evident. New ideas are introduced which later help volunteers in their work performance after returning to their agencies. The professional staff of the executive director also gives suggestions toward effective job performance. These suggestions remain optional; the agencies may or may not implement them. The executive director of the United Way also acts in a liaison position between the agencies and the Board of Directors of the UW; if there is a problem in a member agency, its Board can ask its own staff to call the executive director and she, in turn, discusses this with the board of Directors of the United Way.

Workshops are planned by the United Way to help in the training of volunteers of member agencies and their staff. In the last workshop that was organized (June 26, 1980), each agency was asked to send a team. Volunteers were taught how to work together in the team concept, and staff/volunteer relationships are also strengthened during workshops.

Meetings of member agencies are sometimes called by the executive director of the UW. Occasionally some services performed by them to the community do overlap with those of

other agencies. It is also possible to draw the attention of individual agencies to some areas where they could get some assistance from other member agencies. The United Way puts member agencies together sometimes for purposes of discussions that will remind them of the principles of participation.

Another way the United Way encourages interagency relationships is through agency conferences, in which member agencies are called upon by the Allocations Committee of the United Way to explain what they do and what their programs are. Members of the Allocations Committee also tour member agencies to see for themselves what these agencies do and how they perform. These two ways of communicating help members of the Allocations Committee to understand and evaluate the activities of each member agency of the United Way.

External communication can often be generated by these interagency meetings to bring about increased public awareness. The community residents are educated on what the individual agencies do for the community through UW assistance. The United Way makes public all meetings of the participating agencies and their relationship with other agencies in the county. Through publication of meetings such as those organized by the UW for the purposes of interagency relationships, residents of the county and individual member agencies become more aware of the role of volunteers and might help induce other residents to become volunteers themselves. When volunteers of member agencies relate well and effectively--knowing
why they chose to volunteer--then the needs of the community can be met in a better way.

Each of these various characteristics of the communication process in the UW influences the others and is influenced by them. The resulting unique "system" of communication operates in a kaleidoscope of forces converging, dissipating, and reassembling around unique events; they defy absolute description. Yet, for all the difficulties they must confront, this organization would in all likelihood be found to perform more effectively and productively than most others of its kind.
CHAPTER V

CONCLUSIONS

The communication processes in a volunteer and nonprofit organization such as the Portage County United Way cannot exist without problems, and it is difficult to manage their communication systems. Part of the problem is the sheer number of people involved in the communication processes within the organization. The UW organization deals with over 56,000 persons in Portage County--most of them not knowing what is actually going on, sometimes because they do not care to know. Of the 56,000 residents, about 15% of them contribute money each year, and several hundred of them volunteer services as well. To some degree, the problem may be simply the relationship of volunteers to the organization.\(^1\) One of the most difficult problems faced by the executive director is her inability to delegate tasks successfully to the volunteers. Often too many duties of the organization are regarded as staff functions, like the preparation of documents, detail work time, and work requiring special expertise. Because it is hard to delegate effectively many volunteers who are capable and responsible tend to end up volunteering more time than they had planned. There is a tendency for burnout, and the

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\(^1\)Marlene Wilson, *The Effective Management of Volunteer Programs*, Volunteer Management Association (Boulder, 1978), pp. 59-67. Emphasizes the need for volunteers to relate to one another if they want to accomplish organization goals.
job to be done begins to slow down.

The review of the characteristics of the management of the UW as a volunteer program in Chapter III explodes the old theory that "anyone can run a volunteer program,"² and one finds a sense of urgency on the part of professionals in volunteer agencies to seek advanced training needed to do the job. Some efforts are being made to improve the volunteer organizations although not in a speedy manner. It is hoped that this thesis can make some contribution to that effort.

The Management of Communication in Volunteer Organizations

As described in Chapter I, the research for this thesis raised questions at several levels: (1) the nature of communication in the UW organization; (2) the special characteristics of organizational communication in volunteer organizations; and (3) the transferability of the cooperative approach to meeting local community needs to developing countries, especially the Republic of Cameroon. As a graduate thesis it has been necessary to focus on the first of those three levels, since even that object has been less than fully achieved within the limits of reasonable time and available knowledge. Therefore, that objective was made central to the work reported in Chapters II, III, and IV. However, some inferences were

²Ibid., pp. 75-92.
made possible during this study with respect to the second and third objectives noted above. Even if limited in scope and supporting evidence, they seem worth a brief report in this last chapter. If of no further value, they may stimulate further research of this kind.

The question which seems basic to the issue of communication in volunteer organizations is how it differs from communication in other organizations (business companies or government agencies) where considerable literature exists describing standard organizational processes. Some of these differences, which appeared during this research, can be summarized in two ways: (1) in the operation of the organization as a network of communication channels (vertical/lateral, formal/informal, internal/external); and (2) in the operation of selected communication functions (information flow, planning and supervising, and decision making). These two sets of questions overlap, and they can be approached simultaneously.

In general, the purpose of vertical communication in an organization is to establish "control" through work plans sent down the hierarchy and production reports and problems sent back up. This control function seems designed to achieve maximum production and cost control, but it also operates by feedback interaction to continuously identify problems

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3John W. Baird, Orientations to Organizational Communication, Modcom (1978), pp. 10-16.

4Ibid.
and improve the effectiveness or quality of the work. For some organizations the vertical control interaction also provides a means of maximizing individual job satisfactions.\textsuperscript{5}

The means by which vertical control is implemented varies with all the different philosophies of management and supervision. The key question, however, for volunteer organizations becomes how to maintain the accountability of subordinates at any level in the absence of the coercive forces found in most full-time jobs where systems of pay, job security, promotion, recognition of achievement, etc., are important sources of control. Since work in a volunteer organization is usually given freely, in limited spare time, and out of personal commitment or motivation, the central factor influencing the work behavior of the individual would seem to be the degree of job satisfaction he gets (the meeting of his personal needs by the performance of the work). But he remains free to walk away from that work or to perform it half-heartedly without much material loss.

If the above reasoning is valid, then the primary demand placed on persons supervising volunteers is to maximize knowledge of the workers' personal needs and of what work conditions will satisfy them best. Such a view places great pressure on the communication processes of (1) productive and continuous two-way feedback, far beyond what normally occurs

in a business organization, and (2) productive processes for negotiating in conflict situations when various volunteers may disagree on work behavior, policies, or organization goals. Communication training programs leading to practical skills in this area seem mandatory for both key volunteer supervision and for full-time professionals in volunteer organizations.

Similarly, the main function of lateral communication (sideways between the various work teams or functional divisions) is to coordinate the work in the various specialized task areas into a smoothly working whole. Fundamental to effective lateral communication is (1) clearly defined and fully shared perceptions of the larger goals of the total organization, and of the contribution or place or division or team functions in achieving total goals, and (2) a working climate where achievement of total goals is perceived by teams or divisions as taking priority over their sub-goals. Both of these are difficult to achieve in any organization, and even more difficult in volunteer organizations where immediate rewards to the worker at team or division level may be the key to motivation.

In any event, the main pressure on managers of volunteer organizations is to construct a communication system through which all members, in some way and to the fullest extent

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possible, regularly participate in setting and reassessing both total organization and work team goals. In the absence of such participation and of knowledge of how the parts all serve the whole, commitment to goals will be lowered and lateral communication will probably decline in quantity and effectiveness.

Informal communication\(^7\) (outside the formal channels and unofficial) seems to increase among members of volunteer organizations, perhaps because the sanctions against it are weaker than in business or government agencies. However, such increased informal exchanges may be productive if the outcome finds its way back into the channels of formal action in the organization. Otherwise informal discussions, producing ideas or changes not then considered by the organization, can foster cliques and divisiveness and sometimes fragment the organization.

External communication also assumes special importance to volunteer organizations as noted at several points in Chapter IV. Volunteer community organizations must obviously be responsive to the public attitudes of that community. The same situation, of course, holds between a business company, its market (consumers) and the general public, but a case can be made that volunteer community organizations may be more vulnerable to public criticism, and perhaps less

able to protect their long range goals than a business company. In any event, there does seem to be some need for volunteer organizations to construct especially careful and effective public feedback systems. This issue, when joined with the public responsibility issue discussed under needs assessment in Chapter IV, takes on high importance.

There are undoubtedly many other aspects of communication in volunteer organizations which could be examined for uniqueness in this way. But at least all of these processes can be observed in the operation of the United Way of Portage County, and the implication for at least some of them is that these characteristics may appear in many volunteer organizations of various kinds. A great deal of research is still needed to explore them further.

The Transferability of the United Way System to the Republic of Cameroon

The idea of "self-help" for the people, especially in the rural communities of Cameroon, is essential if this young nation is to grow socially and economically. The residents of these communities must be able to work toward the development of their communities without looking to the government for total support. Through the adaptation of the United Way systems to the Cameroon, the communities might be able to assess their own needs and plan and coordinate the funding for whatever services they consider to be of highest priority for the communities in which they live. The adaptation of the
United Way to Cameroon would not only give the local communities some direct opportunity to act on their own needs in health and welfare, but would also allow the organization (UW) to be visibly "on the scene" when government policy decisions affecting local community services are made.

The development of volunteer organizations in general could also be of great importance. They should be able not only to cut down the size of government expenditures in rural communities, but also train Cameroonian as volunteers to do things for their own communities in many areas of rural life. Although a few volunteer organizations exist today, it seems important to increase their number and the scope of their activity. Those that exist should be allowed to continue, but at local community level all decision making authority should go to a cooperative and representative group of volunteers. By doing so, volunteers representing their total community should be made accountable for the growth of their communities.

The volunteer organizations that exist today in Cameroon have been encouraged mostly by the various religious denominations. Some of these include: the Roman Catholic Church, the Presbyterian Church in Cameroon, Cameroon Baptist convention, and other churches, to mention but a few. Youth organizations also function, although some of them are controlled by a relatively few individuals. For some of these organizations, funding is their major problem. If an organization such as the United Way could coordinate their work, better
health and welfare services could be provided for the communities of Cameroon. If an organization like the United Way were to carry out the coordinating functions of all existing agencies in the community, followed by education of the residents of the communities, people might be able to contribute enough funds to run the system.

In considering the transfer of the United Way to the Cameroon, we can begin by considering what organizations exist there today. After that has been done, it might be possible to consider others for future development.

In most communities of Cameroon today, the following organizations are commonly found:

I. **Youth Organizations**

   **The Boy Scouts of Cameroon:** This provides programs aimed at building character, teaching citizen responsibilities and developing personal and moral fitness for boys age 8 through 20 and young men.

   **Girl Guides:** Helps girls 8 through 18 to gain skills and knowledge through participation in a leader-guided educational enrichment program and character building.

   **Youth Centers:** These are run by Christian churches in most cities throughout the country. Some of these centers help the youths that have not had the opportunity to enter secondary school or commercial schools. While at these centers, the youths take classes in typing, shorthand, and games, all at very minimal charges. Most of the costs are subsidized by the church.
II. Health Services

The Cameroon Red Cross: Provides services to disaster victims, counseling and aid to the disabled, staffs the bloodmobile and offers programs in first aid.

III. Family Social Services

The churches run various programs in which family counseling and training sessions are held, to help the couples of their church.

In all of the above-mentioned areas the government provides only very limited services; the future of such activities probably rests with volunteer organizations.

Although some services are now provided by some communities, as stated above, the communities of Cameroon must learn to provide more for themselves than they do today. But new and expanded services need to be provided in various areas of health and welfare. An organization like the United Way should challenge these communities to fund new services considered to be of high priority, such as:

1. TB Foundation: This is a deadly disease found in most parts of the country. There should be some aid given to the patients which are often not able to handle the high cost of living in the hospitals during treatment.

2. Leprosy Foundation: Leprosy has been one of the main diseases dominant in most of the central and southern
parts of the country. Although some efforts are being made by some volunteers once a year (during "World's Leper Day") as they send gifts in the form of clothing and money to the few leprosy settlements in Mayumen and Mbingo, it is essential that the community as a whole should be charged with this responsibility. This will not only eradicate the disease in the long run, but also defray cost.

3. Blind Centers and Disabled: Very few blind people of the country are taken care of at the Bulu Blind Center, which has been solely the responsibility of the state. The community should be able to do something to help its blind residents. All that I have stated above should also be applicable to the disabled in the community.

4. Orphanages: The newly born, who are left with no parents, should be given aid by the community. The mission hospitals do run some orphanages—but on very limited budgets. It is therefore necessary for the communities to be able to aid in the existing orphanages financially.

As soon as the communities of Cameroon are able to select and form such new health and welfare agencies of their own, it would be the task of any local United Way to place these agencies in order of priority for local funding.8

---

8These suggestions were made by 16 Cameroon students in Stevens Point who considered our needs and listed the proposals as seen above. From experience as Cameroonians, we considered those services to be of highest priority.
The degree to which the residents of the communities of Cameroon may be able to contribute toward community organizations may differ from what takes place in the Portage County United Way. This may create some problems in adopting the United Way to the culture of Cameroon. Since most of the communities of Cameroon are more rural than urban, it will be very difficult for effective external communication to take place. If it does take place at all, it will require more time in fund raising than it would in an urban community such as we have in Portage County.

The degree in which people are willing to volunteer toward contributing to community services will be another problem. Although most communities of Cameroon favor self-help programs, there are still some who believe that the government should be able to do everything for them just because they pay taxes to the state. As soon as people become aware of community needs and are able to volunteer to see that these needs are met by its residents, then it will be possible to adopt an organization such as the United Way in the Cameroon.

I strongly believe that this kind of system could be adapted to most developing nations such as Cameroon. Such a system would not only help the local residents to solve their own health and social services problems (instead of looking to the government to do things for them), but it would also give residents a part in the making of decisions that affect their own local communities. If there is shortage of money, some system could be devised for the UW to act as a joint venture with the local government.
Such a system would also help to develop the desire for other self-help projects in the communities of Cameroon. Members of the rural communities could learn to do things "together" through the voluntary way. Through the collective way, the burden to provide services to the communities in the areas of health and social welfare would be distributed equally among the residents.

A communication system, stating clearly the processes of communication necessary to establish and operate a cooperative program, would be necessary. To do this effectively, the new United Way of Cameroon could be structured like the United Way of Portage County. The main difference in the structure would be in the area of participating agencies, since most of the needs of communities of Cameroon are not the same as the needs of the people of Portage County. Although problems would certainly develop, the concept of a cooperative volunteer approach to meeting local community needs seems needed and capable of transfer to Cameroon.
APPENDICES
APPENDIX I

UNITED WAY OF PORTAGE COUNTY
PRINCIPLES OF ADMISSION

Objective of the United Way: To represent the desires of the givers by coordinating their giving so that the money necessary to meet the needs of the community may be raised efficiently and effectively. The United Way proceeds on the assumption that the general community's support of member agencies over the years is substantially sound--successful United Way campaigns can be attributed to the fact that these various agencies have won a place in the hearts and pockets of the large majority of the giving public.

I. INTENT

Admission Principles are essential:
1. As a guide for agencies who may wish to affiliate themselves with the United Way of Portage County.
2. To give the United Way an orderly framework within which it may function.

The intent of these Admission Principles is to be sufficiently broad so that the maximum consideration for membership can be given to nonmember organizations. Acceptance as a member agency does not guarantee participation in the United Way campaign--all agency allocations are considered separately and after applications for membership have been approved by the Board of Directors.

II. INCLUSION

A. General Acceptability
   An agency must provide a service in one of the following categories:
   1. Health
   2. Welfare
   3. Recreation

   In general, agencies will be ineligible for membership if they provide service exclusively in one of the following categories:
   1. Culture
   2. Education
   3. Politics and/or Propaganda
   4. Religion
B. General Standards
An agency should fulfill the following criteria to be eligible for membership:

1. Be incorporated as a non-profit organization, contributions to which are deductible under Section 501 (C) (3) of the Internal Revenue Code.

2. Be able to demonstrate evidence of satisfactory organization--be governed by boards representative of broad community interest which conduct business in accordance with approved bylaws.

3. Be managed and financed in a sound, efficient manner in accordance with generally accepted accounting principles.

4. Be able to demonstrate fulfillment of an existing community need for which there is no provision at present, or be able to demonstrate community readiness to accept a new service area.

5. Be able to demonstrate fund-raising ability or be of such importance to the community as to add potential fund-raising appeal to the United Way campaign.

C. Specific Criteria
An agency must furnish the following items when submitting an application for membership:

1. Copy of Articles of Incorporation

2. Copy of Bylaws and/or Constitution

3. Statements from the state and federal revenue services showing the agency is non-profit and tax exempt

4. Statement of financial position for the local operation or the state office (if former doesn't exist). Include Income and Expense Statement, and Balance Sheet for:
   (a) End of previous fiscal year (audited)
   (b) End of month preceding date of application

5. Outline of services rendered locally (in Portage County) during the past calendar year and proposed future programming (use Program Information and Beneficiary sheets, pp. 2 and 3 of application).

6. List of current local Officers and Board of Directors
D. Period of Inclusion

1. It is assumed that agencies will wish inclusion over a period of years, except that a specified period may be requested by an agency or recommended by the Allocations Committee.

2. The participation of an agency may be reviewed and determined annually.

3. An agency, upon written notice by June 1, may withdraw their membership from the United Way effective December 31 of that year.

F. Appeal

1. Whenever the Allocations Committee recommends against inclusion of an agency, the agency will be so notified in writing. If the agency wishes to take exception to this recommendation, it must do so within ten days of the notification by presenting additional information to this Committee. If the Committee sustains the recommendation, it shall so report to the agency in writing, and carry this sustained recommendation to the Board of Directors.

2. As a further appeal, the agency may request a review by the United Way Board ten days after the Board has approved the Allocations Committee's recommendation to deny admission. Its reasons for such appeal should be clearly stated. Action on the recommendation by the United Way Board shall be final.

NOTE: The Principles of Admission apply only to the component (separate entity) of an agency that is funded by the United Way.
APPENDIX II

By February 29, submit one typed original to:
United Way, Box 101, Stevens Point, Wisconsin 54481

UNITED WAY OF PORTAGE COUNTY
APPLICATION FOR ADMISSION

AGENCY NAME:__________________________________________________________

ADDRESS:______________________________________________________________

TELEPHONE:____________________________________________________________

EXECUTIVE:____________________________________________________________

LOCAL CONTACT PERSON (if different than above)
NAME________________________
ADDRESS_______________________
TELEPHONE_____________________

Agency's Service Category: (please check one)
HEALTH_______________________
WELFARE_______________________
RECREATION___________________

Is Agency incorporated as a private, non-profit organization?
Yes_____ No_____

Please attach following documents:
(1) Copy of Articles of Incorporation
(2) Copy of Bylaws and/or Constitution
(3) Statements from the state and federal revenue services showing the agency is non-profit and tax exempt
(4) Statement of financial position for the local operation of the state office (if former doesn't exist). Include Balance Sheet, and Income and Expense Statement for:
(a) End of previous fiscal year (audited)
(b) End of month preceding date of application
(5) Outline of services rendered locally (in Portage County) during the past calendar year and proposed future programming (use Program Information and Beneficiary Sheets, pp. 2 and 3)
(6) List of current local Officers and Board of Directors
PORTAGE COUNTY PROGRAM INFORMATION FOR FISCAL 1981

A. What program(s) (requiring United Way funding) are planned for the budget year and for what target group(s)?

B. How do these program(s) vary from similar programs offered by other agencies in the community?

C. What method(s) will be used to evaluate these programs, to determine if they are meeting community needs successfully?

D. Will the agency modify this program(s) if full funding is not available?
UNDUPLICATED COUNT OF PROGRAM BENEFICIARIES

<table>
<thead>
<tr>
<th>LOCATION OF RESIDENCE</th>
<th>1979 Actual</th>
<th>1980 Estimated</th>
<th>1981 Budgeted</th>
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<tr>
<td>Stevens Point, Park Ridge, Whiting...........</td>
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<tr>
<td>Junction City............................................</td>
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<tr>
<td>Custer, Polonia, Rosholt, Amherst.........................</td>
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<td>Plover, Almond, Bancroft................................</td>
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<tr>
<td>Not Known..................................................</td>
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<td>TOTAL......................................................</td>
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Other Pertinent Statistics (Normally generated by agency and deemed to be of interest to the United Way):

If Available and If Applicable:

MALE  ____

FEMALE ____

________________________________________

________________________________________

________________________________________
APPENDIX III

BY APRIL 30, SUBMIT ONE TYPED ORIGINAL TO:
UNITED WAY OF PORTAGE COUNTY
P.O. BOX 101 - 1052 MAIN STREET
STEVENS POINT, WI 54481

BUDGET FOR 1981 OPERATIONS

ALLOCATION REQUESTED: $______________________________

AGENCY NAME:________________________________________

ADDRESS:____________________________________________

TELEPHONE:__________________________________________

EXECUTIVE:__________________________________________

LOCAL CONTACT PERSON (if different than above)
NAME:________________________________________________

ADDRESS:____________________________________________

TELEPHONE:__________________________________________

1. Attach copy of latest financial audit

2. Attach a list of current Board Members.

I certify the information provided herein is true and accurate
to the best of my knowledge.

DATE_____________   _______________ SIGNATURE
NPTE: FILL IN ANSWERS DIRECTLY ON THIS PAGE—NO EXTRA MATERIAL PLEASE!

PORTAGE COUNTY PROGRAM INFORMATION FOR FISCAL 1981

A. What program(s) (requiring United Way funding) are planned for the budget year and for what target group(s)?

B. How do these program(s) vary from similar programs offered by other agencies in the community?

C. What method(s) will be used to evaluate these programs, to determine if they are meeting community needs successfully?

D. Will the agency modify this program(s) if full funding is not available?
### UNDuplicated Count of Program BeneficiARies

<table>
<thead>
<tr>
<th>Location of Residence</th>
<th>1979 Actual</th>
<th>1980 Estimated</th>
<th>1981 Budgeted</th>
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<td><strong>Total</strong></td>
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</table>

Other pertinent statistics (Normally generated by agency and deemed to be of interest to the United Way):

If available and if applicable:

- **Male**
- **Female**
SCHEDULE OF POSITIONS AND SALARIES FOR AGENCY STAFF IN LOCAL OPERATION (OR STATE OFFICE IF NO LOCAL OPERATION OFFICE)

<table>
<thead>
<tr>
<th>POSITION</th>
<th>NUMBER OF EMPLOYEES IN POSITION</th>
<th>FULL TIME SALARIES**</th>
<th>1980</th>
<th>1980</th>
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</tbody>
</table>

*Full time staff will be noted as 1.00; half time as .50; quarter-time as .25 and so on.

**All Financial Information Rounded to Nearest Dollar.
MAJOR DIFFERENCES IN INCOME AND EXPENSES

FISCAL 1980 (THIS YEAR REVISED) AND FISCAL 1981 (NEXT YEAR BUDGETED)*

(Only list differences of 20% or more, for local operations)

<table>
<thead>
<tr>
<th>LINE NO.</th>
<th>ITEM</th>
<th>FISCAL 1980 THIS YEAR REVISED**</th>
<th>FISCAL 1981 NEXT YEAR BUDGET**</th>
<th>INCREASE OR (DECREASE) AMOUNT %</th>
<th>EXPLANATION</th>
</tr>
</thead>
</table>

*Refer to page 4, columns 3 and 4.

**All Financial Information Rounded to the Nearest Dollar.
UNITED WAY OF PORTAGE COUNTY

INSTRUCTIONS
FINANCIAL DATA FORM

This form lists Income and Expenses by line item. All financial information should be rounded to the nearest dollar. Negative figures should be bracketed ( ).

Column 1 - Previous Year Actual - This would show actual figures for the last year, per the audit you enclose.

Column 2 - This Year Budget - This would show the figures previously presented to the United Way for the current year budget.

Column 3 - This Year Revised - This would show revised figures based upon the actual experience during the year and projections for the balance of the year.

Column 4 - Next Year Budget - This would show budgeted figures for the next year to be used as the basis for support requested through the United Way.

Column 5 - Dollar Change - Column 4 minus Column 3.

Column 6 - % Change - Column 5 divided by Column 3.

Lines 1 - 15 are for sources of Income. These definitions may be supplemented by referring to Accounting & Financial Reporting - Guide for United Ways and Not-For-Profit Human Service Organizations, United Way of America, December 1974.

Line 1 - Contributions - Unsolicited gifts for which the donor receives no direct private benefit. Also includes amounts received in excess of regular (participating) memberships as contributing (sustaining) memberships.

Line 2 - Special Events - Affairs where something of value is offered for a payment which exceeds the cost of the event, i.e. dinners, dances, bazaars, card parties, fashion shows, and cookie, candy, greeting card sales.

Line 3 - Legacies and Bequests - Gifts made through a will to be spent within that year, including restricted or unrestricted funds; and also undesignated and designated funds for expense items on lines 16-33, to be spent within that year.

Line 4 - Other Public Support - Direct or Indirect - self-explanatory.
Line 5 - Allocated by Other United Ways - Amount received from United Ways, other than the one for whom this report is prepared.

Line 6 - Fees and Grants from Government Agencies - The amount received from federal, state and local governments in fees and grants for service and purchase of service contracts.

Line 7 - Membership Dues from Individuals - Dues paid by members to receive benefits commensurate in value to the amount of the dues. Amounts received in excess of regular (participating) membership as contributing (sustaining) membership or similar classifications should be reported as contributions under line 1.

Line 8 - Dues from Local Member Units - Revenue received from member agencies for general membership benefit based upon dues classifications, fair share quotas, etc.

Line 9 - Service Fees/Memberships - Payments received for services rendered in the normal course of an agency's business.

Line 10 - Sale to Local Member Units - Revenue from the sale of publications, materials, supplies, consultation and service to associated organizations.

Line 11 - Sales to Public - Revenue from the sale of publications, materials, supplies, consultation and service to the public.

Line 12 - Investment Income - Revenue from investments, securities, and real estate in the form of interest, dividends, rentals, royalties, etc., being used for operating purposes.

Line 13 - Gains (Losses) on Investment Transactions - Realized gains or losses from the sale of investments being used for operating purposes.

Line 14 - Miscellaneous - An accumulation of other revenue not reported in other items.

Line 15 - Total Income - the total of lines 1 through 14.

Lines 16 - 33 are for Expenses. These definitions may be supplemented by the Accounting & Financial Reporting Guide listed above or Budgeting - A Guide for United Ways and Not-For-Profit Human Services Organizations, United Way of America, December 1974.
Line 16 - **Salaries** - Salaries and wages paid employees--use total reported on Supporting Schedule 1.

Line 17 - **Employee Benefits** - Hospitalization, medical, disability, life, accident and other insurance and pension or retirement plan payments or premiums.


Line 19 - **Professional Fees** - Medical, dental, legal, auditing fees and expenses, contract payments and professional consultants.

Line 20 - **Supplies** - Cost of materials, appliances and other supplies.

Line 21 - **Telephone** - All telephone, telegraph, mailgram and similar expenses.

Line 22 - **Postage and Shipping** - Postage, parcel post, trucking and other delivery expenses, including shipping supplies.

Line 23 - **Occupancy** - Costs arising from the occupancy and use of owned or leased land, building and offices, excluding costs reported elsewhere, i.e. salaries, depreciation, etc. Includes: rent, building and equipment insurance, mortgage interest, electricity, heat, utilities, janitorial and maintenance services, maintenance supplies.

Line 24 - **Rental & Maintenance of Equipment** - Costs of renting and/or maintaining equipment.

Line 25 - **Printing and Publications** - Cost of printing, art work, photographs, etc., used for publications, leaflets, films, displays and other informational materials. Also the cost of journals, books, pamphlets, etc., purchased.

Line 26 - **Travel** - Expenses of travel, transportation, hotels and meals, for staff or volunteers on agency business.

Line 27 - **Conferences, Conventions, Meetings** - Expenses of conducting meetings related to the organization including space and equipment rental, programs, notices, food costs, speakers honoraria and expenses, etc. Also includes staff registration fees for conferences and conventions.
Line 28 - **Specific Assistance to Individuals** - Specific material assistance or service purchased for a particular client or patient - i.e. medical, dental and hospital fees; boarding costs; home care services; client or patient travel, food, shelter, clothing and camperships.

Line 29 - **Membership Dues** - Amounts paid for membership in other organizations which provide benefits to the agency; i.e. services, publications, supplies, etc.

Line 30 - **Awards and Grants** - Amounts paid to individuals or organizations for support of research, fellowships, scholarships, etc.

Line 31 - **Miscellaneous** - An accumulation of other expenses not included in other items, i.e. professional liability insurance, state charitable registration fee, etc.

Line 32 - **Dues to State or National Organization** - Allocations made to affiliated organizations.

Line 33 - **Major Property & Equipment Acquisition** - The cost of acquisition of major property and equipment including outlays for capitalized items.

Line 34 - **Total Expenses** - The total of lines 16 through 33.

Line 35 - **Excess (Deficit) of Income Over Expenses** - Line 15 minus line 34.
UNIVERSITY WAY OF PORTAGE COUNTY, INC.  
P.O. Box 101, 1052 Main, Stevens Point, WI 54481

Name ____________________________ Company ____________________________

Home Address ____________________________

To share in the support of the human services provided by the member agencies of the UNITED WAY OF PORTAGE COUNTY, I pledge as follows:

PAYROLL DEDUCTION
I authorize my employer to deduct:

$ _______ Per Week
$ _______ Bi-Weekly
$ _______ As Follows:

TOTAL PLEDGE $ _______ 

DIRECT BILLING OR CASH
I authorize the United Way to bill me:

- Monthly
- Quarterly
- Other

Total Pledge $ _______
Paid Now $ _______
Balance Due $ _______
Cash Fully Paid

BANK DEDUCTION
I authorize the _______ Bank to honor a monthly receipt of $ _______ for the United Way for one year to be deducted from my checking account and credited to United Way of Portage County as of

January _______ 19 _______

Account No. _______ 

TOTAL PLEDGE $ _______

Contributor's Signature ____________________________ Date _______

UNITED WAY OF PORTAGE COUNTY, INC.  
Membership Receipt

Received of ____________________________

BANK DEDUCTIBLE GIFT

UNITED WAY

Total Pledge $ _______  
Paid Now $ _______  
Balance $ _______

Date _______  Solicitor _______  OVER _______
APPENDIX V

NOTE: Interviewer's form will have space between questions for responses

INTERVIEW #

UNITED WAY OF PORTAGE COUNTY PLANNING COMMITTEE

KEY INFORMANT SURVEY 1979

1. YOUTH SERVICE NEEDS
   a. What youth service needs are currently being met in Portage County? Would you please indicate which of these met needs are the more important.

   b. What youth service needs are currently unmet in Portage County? Would you please indicate which of these unmet needs are the more important.

   c. Do you have any suggestions as to how United Way might improve its services in the area of youth programming?

2. COUNSELING SERVICE NEEDS
   a. What counseling service needs, such as for marriage, family and youth, are currently being met in Portage County? Would you please indicate which of these met needs are the more important.

   b. What counseling service needs are currently unmet in Portage County? Would you please indicate which of these unmet needs are the more important.

   c. Do you have any suggestions as to how United Way might improve its services in the area of counseling programming?

3. HEALTH SERVICE NEEDS
   a. What health service needs are currently being met in Portage County? Would you please indicate which of these met needs are the more important.
b. What health service needs are currently unmet in Portage County? Would you please indicate which of these unmet needs are the more important.

c. Do you have any suggestions as to how United Way might improve its services in the area of health programming?

4. EMERGENCY SERVICE NEEDS

a. What emergency service needs, such as fire, flood or tornado assistance, are currently being met in Portage County? Would you please indicate which of these met needs are the more important.

b. What emergency service needs are currently unmet in Portage County? Would you please indicate which of these unmet needs are the more important.

c. Do you have any suggestions as to how United Way might improve its services in the area of emergency programming?

5. HANDICAPPED SERVICE NEEDS

a. What handicapped service needs are currently being met in Portage County? Would you please indicate which of these met needs are the more important.

b. What handicapped service needs are currently unmet in Portage County? Would you please indicate which of these unmet needs are the more important.

c. Do you have any suggestions as to how United Way might improve its services in the area of handicapped programming?

6. ELDERLY SERVICE NEEDS

a. What elderly service needs are currently being met in Portage County? Would you please indicate which of these needs are the more important.

b. What elderly service needs are currently unmet in Portage County? Would you please indicate which of these unmet needs are the more important.

c. Do you have any suggestions as to how United Way might improve its services in the area of elderly programming?
7. Can you identify any human service needs which you think are important, and are not presently being met in Portage County?

YES_________ NO_________

If yes, please explain:

8. What do you believe is the most important human service need that exists in our county today, and why?

9. In general, do you think the various community agencies are helping the people who really need it?

YES_________ NO_________

How do you judge that these needs are or are not being met?
BIBLIOGRAPHY

BOOKS


Carter, Walter et al., The Joint County-City United Way Program for Planning and Funding Human Care Services With General Revenue Monies. San Diego: State University, 1976.


ARTICLES


Smith, D.H., "United Way is the Name, Monopoly is the Game," Business and Soc. Review 25 (Spring, 1978), pp. 30-34.

