



# THE COMPUTERWORLD HONORS PROGRAM

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## CASE STUDY

### ORGANIZATION:

United Way of America

### PROJECT NAME:

Macromedia Breeze Deployment

### Summary

United Way Live leverages the power of Adobe Breeze to provide an engaging, media-rich approach to community mobilization by connecting people in live online meetings. United Way Live encourages United Way professionals to play an increasingly important role in vital communications with system leaders, community partners and corporate partners, and providing additional tools to strengthen communities and improve lives.

### Introductory Overview

The United Way System, comprised of over 1,350 local United Ways across the country, brings diverse people and resources together to address the most urgent issues their communities face. Through unique partnerships and approaches, United Ways mobilize resources beyond the dollars that are pledged through their fund-raising efforts. Community partners often include schools, government policy makers, businesses, organized labor, financial institutions, voluntary and neighborhood associations, community development corporations, and the faith community.

In 2004, United Way of America (UWA), headquarters of the United Way movement, recognized a need to enrich communications, improve accessibility, expand the reach of its messages, foster dialogue and share resources with local United Ways, community investors and partners across the country. The United Way Live (UWL) project was created to fit this need.

United Way Live leverages the online events functionality of Adobe Breeze to provide a transformed approach to the vital community mobilization and communication work in which United Ways engage. Over the last eighteen months, United Way has used Breeze to produce large public webinars, collaborate on mission-critical decisions and documents, respond to natural disasters, train staff on new Promising Practices, webcast national conferences, and create a new knowledge capture system. The project integrates these features with the United Way intranet to provide a seamless user experience that empowers United Ways large and small alike to take an active role in communications impacting the United Way movement.

As time passes, it becomes increasingly evident that not only has United Way Live been a tre-

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menhous success, but also that it has become a key element of the United Way culture and has facilitated partner mobilization, strengthened communities and improved lives in communities across the country.

### Benefits

The United Way Live (UWL) project provides the United Way system with improved communication channels and easier access to mission-critical content, ideas and thought leaders. UWL has also provided an efficient way to bring people together from a wide variety of geographically-dispersed local United Ways, agencies and community partners in a single virtual room online. By leveraging the power of Adobe Breeze, we have achieved what was impossible a year ago –capitalizing and sharing knowledge and experiences wherever they exist in the United Way system without traditional constraints such as the lack of time and financial resources. By overcoming these obstacles, UWL has had a tremendous impact on the entire United Way system. Cynthia Hawbaker succinctly summarizes the impact of United Way Live:

“I appreciated the way that these webinars connected so many of us to each other; I reside in a rural area and this definitely removes the barriers of isolation. Thank you for your commitment and dedication to this process. It is evident that a high degree of research, professionalism, and collaboration has occurred and will continue to occur in the future. It is exciting to a part of such positive, pioneering territory. I look forward to seeing this endeavor unfold.” - Cynthia Hawbaker, Executive Director, United Way of Franklin County

In addition to saving valuable time and donor dollars, this project has allowed United Way leaders to expand the reach and frequency of their communications within the system. Brian Gallagher, President and CEO of United Way of America, has routinely reached out to the United Way field through UWL’s virtual meetings, often reaching audiences of over 500 people. Before this project was implemented, such communications would have typically been restricted to large conferences, teleconferencing, or on-site events. Today, our mission-critical messages and communications have expanded beyond the boundaries of such events – requiring less setup time while offering a truly media-enriched learning experience. Within a few hours, a virtual event can be planned, scheduled and marketed to the right people at the right time, allowing us to respond more quickly and efficiently to challenges as they arise.

United Way’s response to Hurricane Katrina provides an excellent example of the utility provided by United Way Live. In response to the devastating 2005 hurricane season, United Way convened hundreds of United Way professionals across the United States to assist the Gulf Coast United Ways to implement a disaster relief and recovery plan to restore affected local United Ways to operational capacity and to enable them to resume service to their ravaged communities. Breeze enabled instant collaboration around planning documents, facilitated discussions and financial projections around fund reallocations, and allowed leaders around the country to share their experiences, needs and requests with their colleagues.

United Way Live has also drastically improved the level of engagement with local United Ways. Breeze allows United Way professionals to assume the role of an active participant in the content rather than treating them as passive participants or simple consumers of information. Instead, United Way professionals now take an active role creating content and shaping the direction of these discussions by contributing their thoughts and questions, directly interacting with speakers, and exchanging their own experiences and knowledge with their peers. In a very real way,



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this project has empowered local United Ways by giving them an active voice in the United Way decision-making process, enabling them to collectively respond as a system through these online events.

Similarly, Breeze has facilitated the mobilization work that United Way does on a daily basis by seamlessly connecting system professionals with the agencies they serve and the community leaders with whom they partner. On several occasions, United Way has convened meetings with several organizations within our National Corporate Leadership Program, which focuses on delivering impact in communities through philanthropic relationships with national and global companies, such as IBM, Pfizer and 3M to work on issues in communities around the world.

UWL has served United Way as a key tool for knowledge capture and distribution. Before using Breeze, United Way staff relied on more traditional methods of knowledge capture and retention: note taking, paper reports, and email. Today, every online meeting is recorded and published for playback available twenty-four hours a day, seven days a week. This enables asynchronous learning if certain participants are unable to attend the live online session due to time zone conflicts. United Way's captured content and recordings has served to multiply the reach of our messages – as post event traffic to the replay links is usually even greater than participation in the actual meeting itself. United Way of America is able to package these recorded events to provide a better categorization of this knowledge to become a virtual syllabus about United Way topics.

“The webinar process at United Way of America has allowed the system to expand its horizons well beyond what has been traditionally known. One very specific capability that we now have is the ability to quickly share “Promising Practices” throughout the system. This allows United Ways to quickly internalize these practices that result in greater community impact sooner. This is the very essence of United Way’s mission” – Michael Hendon, Vice President of Learning

While United Way of America has substantially benefited from this project already (see “Success” section below for specific examples), local United Ways in communities across the country are beginning to explore how a localized version of UWL and Adobe Breeze can also revolutionize the way they communicate with local agencies and partners in their own communities. Similarly, United Way International, a separate legal entity and sister corporation to United Way of America, has begun exploring ways to better connect their 3,600 organizational affiliates across every time zone and in nearly every community in the world by leveraging UWA’s successes and experiences in this project.

Because of United Way’s continuing success and leading-edge usage of these new communication tools, other national nonprofits have begun taking note. United Way acts as an advisor to several of the organizations that make up the Leadership 18 group, eighteen of the nation’s largest and most influential charities. The potential to more efficiently connect these groups to each other, their donors and their community investors is virtually unlimited.

### The Importance of Technology

The United Way Live project fundamentally relies on Adobe Breeze to provide the functionality and underlying technology that has enabled the project to be so successful. This technology was fundamental in meeting internal needs, providing an accessible interface for internal project



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administrators and creating a user-friendly, but robust set of meeting tools to fulfill the needs United Way professionals and other end users. A few highlights below help to illustrate the vital role that Breeze played in making United Way Live so effective:

**Integration Compatibility:** First and foremost, it was important for United Way to provide a seamless end user experience, allowing the users to move easily between United Ways intranet and UWL. Because the majority of United Way of America's web architecture is based on Adobe ColdFusion, we were able to easily integrate UWL/Breeze into our existing environment.

**Mini Content Management System (CMS):** Document and resource sharing, webinar recordings and archives and making other resources available to our users was a key requirement of UWL. The Adobe Breeze technology made this simple. This technology has facilitated the exchange of files that too often are emailed as attachments and get blocked by corporate email filters – destroying any potential value the resources may have had. By posting presentations, documents and videos in the CMS contained in Breeze, and by accessing the same resources in a live online session with a click of a button, UWL guarantees that event participants will have the resources they need.

**Ubiquitous Software:** One of the reasons that people have adopted UWL so quickly relates to the ubiquitous nature of the software. Adobe Breeze does not require the user to install a proprietary plug-in as required by most of its competitors. As a result, fewer technical issues arise to frustrate users. Given the vast diversity in technical sophistication within the United Way system, the ubiquitous flash player also provided a common base upon which we could create content and add enhancements.

**Flexibility and Ease of Use:** Breeze technology allows every single meeting host to adapt the layout and features displayed within their meeting. By recognizing that each and every meeting is unique, Breeze gave us a way to quickly tailor the display canvas to maximize collaboration, real time Q&A, broadcast newly created multi-media elements, broadcast live on-stage video, run a slide show or accomplish virtually any purpose needed without leaving the meeting room interface. Breeze also gives UWL an extremely user-friendly interface that required minimal training and ramp-up time before a host felt confident to present. This was also fundamental in helping speed the adoption of UWL as a primary communication tool.

### Originality

The creation of United Way Live coincided with a critical juncture in the United Way System's current transformation. For the last five years, United Way has been making the difficult transition from a pass-through fundraiser to a value-add mobilizer in the community – leveraging its networks to convene key stakeholders in the community to work on root causes of community problems and achieve lasting change. As a result of this transformation, UWA needed an innovative way to open a system-wide dialogue around the new United Way mission. United Way Live provided this solution.

UWL was the first internal application of its kind to enable simultaneous communication between the various 1,350 individual local United Way organizations that were directly engaged in the reality of system transformation. UWL also provided a very visible way of highlighting key transformation success stories, called the "Transformation Diaries" webinar series, and identified the best practices that served to guide top performing United Ways. United Way Live provided



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a transformation message that was tangible and meaningful to its audiences. People not only heard about the transformation, but they also questioned it, discovered it, debated it, and eventually became the part of transformation itself. UWL served as a forum for discussion and as a result, helped speed the overall system transformation.

United Way Live is unique in that it forced the United Way System to think differently about what effective communications really meant – especially as they related to United Way's new focus on community mobilization. Before starting the UWL project, little attention had been given to the ways in which technology was able to meet the new pressing business need of a community mobilizer. Through the creation and publication of UWL, this culture began to change. Not only did people start using the various online events and meetings to a much greater extent than we had expected, but they started demanding that more and more content be delivered through the online medium.

### Success

The United Way Live program has benefited a wide variety of individuals, functional groups and organizations within the United Way System, including:

- Immediate Organizational Response to Hurricane Katrina – Shortly after Hurricane Katrina hit, Ed John, Vice President of Planned Giving, used Breeze to quickly convene United Way professionals to discuss the Hurricane Katrina Emergency Tax Relief Act (KETRA) and what it meant for potential donors. During the session, participants actively participated in decisions vital to the disaster recovery and relief efforts by focusing on the allocation of funds to Gulf Coast United Ways. Breeze allowed the meeting hosts to share an Excel spreadsheet that analyzed the regions most affected by the hurricanes and most in need of drastic and immediate financial support.

“A webinar was the only way we could get a unified message with support materials out to local United Ways quickly. It helped them understand the benefits and clear up misunderstandings about the bill...not only with donors but occasionally some professional advisors who were misinformed and giving the wrong advice. Although it is difficult to quantify the true impact of the webinar, anecdotal information indicates the impact in additional charitable dollars was in the millions. The webinar enabled us to be nimble, focused and responsive in ways not possible without this technology. – Ed John, Vice President of Planned Giving

- Improving Customer Relationship Management - Internally, the UWL project has facilitated the further spread of other information technology applications such as customer relationship management software, Salesforce.com. By using Breeze for daily promotional calls, Project RELATE, United Way of America's Relationship Management Initiative, has been able to expand its reach and encourage the growth of United Way's focus on strong customer relationship management within the system.

“Breeze is a tool we rely on to “sell” a local United Way on our Project RELATE program. Nothing beats seeing visuals or a live system in action. It is so easy to use that I don't think twice about setting up a Breeze session on the fly in the same way that I use conference calls” – Jim Yu, Vice President of Relationship Management

- United eWay Products and Services Rollout – United eWay is a wholly owned subsidiary of United Way of America that provides a suite of technology products and services built to



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efficiently enable community-focused impact. Breeze has enabled the United eWay team to directly connect with their customers by offering interactive product demonstrations, online solution implementation and troubleshooting assistance on demand. Additionally, the Breeze platform has given eWay professionals the flexibility and functionality to record solutions to commonly asked questions or problems and convert these videos into online resources for their clients.

“We benefit on many levels from the simple, yet powerful Breeze application. The United eWay business is primarily provision of electronic solutions. With an interface such as Macromedia’s Breeze that allows for quick setup and delivery of online demonstrations, we are able to create significant impact with a small salesforce.” – Brian Leamy, Vice President, Enterprise Services

- Field Leadership Team Meetings – Michael Williamson, Vice President of Field Leadership manages a geographically dispersed team of United Way professionals in three different locations. Breeze has allowed the Field Leadership team to turn their weekly conference calls into truly interactive and collaborative sessions.

“So much of what we do requires teamwork and collaboration – which can be difficult to accomplish when team members reside in three different states. Truthfully, I can’t really imagine us now not using Breeze on a weekly basis. Breeze Live Meetings have allowed us to not just talk about what we are doing, but to actually show each other what we are doing. We can now collaborate on documents just as we would if we were in the same room. This difference has not only made an impact in our group. The local United Way professionals we serve have seen the difference as well. We can now engage them on a daily basis without ever leaving the office” – Michael Williamson, Vice President, Field Leadership

- Ensuring a Consistent Brand Message – Perhaps more than any other internal group at United Way, the Creative Studio department has used Breeze to communicate vital and dynamic messages to brand and marketing professionals in the field as United Way embarked on a new brand messaging strategy – communicating “what matters.”. Breeze has given Peter Hahn, Director of United Way Creative Studio, the flexibility to deliver dynamic messages to his audiences by broadcasting rich media and flash content to brand and marketing professionals across the country.

In addition to these examples, United Way Live has succeeded in providing a high quality product to its individual end users as well. In fact, United Way professionals have given UWL webinars an overall satisfaction rating of 4.9 out of 5 possible points as measured through over 1,000 responses to United Way’s anonymous webinar evaluation survey. Below are some additional quotes from individuals who have benefited from this program:

“I love the format/layout of the webinar. Logically laid out, makes it easy to focus on presentation. Especially appreciate photos of presenters. Also appreciate sound through speakers rather than phone ... leaves hands free for taking notes!” - Anonymous

“I love these webinars. I especially appreciated being able to view the archive. It was so nice to get the e-mail about the archive and just click on the link and watch! Thanks so much!!!” - Anonymous

“The technology was great. This was the most enjoyable webinar I’ve participated in - pictures of the presenters, list of listeners, real-time polling etc. Very cool.” - Anonymous



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“I just want to say these webinars are a great information resource for this office of 1 1/2 employees to bring us up to speed on knowledge of United Way. Thank You.” - Christine (no last name given)

“You folks do an outstanding job with these webinars. They are interesting, informative, and engaging, and I really look forward to them. Thanks very much and keep up the great work!” - Jeannine Glista

“These webinars are very helpful. It is nice to be able to communicate to know that other United Way’s have many of the same questions and situations as we do.” - Anonymous

United Way began this process to find more media-rich, engaging and empowering ways of communicating. The degree and speed with which our end users have adopted Breeze as a primary communication tool has surpassed even our most optimistic projections. Within eleven months, over 4,000 individual, unique participants have created accounts within the Adobe Breeze system. The speed with which United Way Live was adopted internally surprised even our knowledge management professionals:

“I have participated with many enterprise level application deployments and our Breeze implementation was the fastest and easiest deployment I have experienced in my 10 years in the IT world. The end user adoption and acceptance rate was phenomenal!” – Wil Vargas, Director Knowledge Management, United Way of America

The adoption of UWL happened so rapidly that our demand for events increased in lockstep – driving us to surpass our 2005 estimates and produce 30 public webinars. Due to yet more demand in 2006, we expect to produce over 120 additional webinars, an annual increase of 400%. Additionally, we were excited to discover that our webinar archive and resources page had registered over 5,500 visits since the beginning of the project.

United eWay, Project RELATE and other internal professionals with relationship-based roles have also quickly adopted the tool as their primary online relationship management tool through which they can demonstrate technology solutions and interact with their clients. In 2005 alone, United Way professionals conducted more than 350 small-scale sales meetings using Breeze with more being created and scheduled every day.

### Difficulty

Because United Way has partnered with Adobe to leverage a hosted version of Breeze, many of the technical hurdles to the UWL implementation were avoided. It should also be mentioned that United Way selected Breeze as the base of its United Way Live project due in part to its instant compatibility with internal United Way systems. This also allowed the project to avoid any serious technical problems.

However, because we had underestimated how quickly internal audiences would adopt the new tool, we were not prepared for the volume of events we would be producing in Breeze. Due to the magnitude of each event and the required hardware to facilitate the production of high quality sound and video, United Way of America initially had difficulty maintaining a stable production environment. Additionally, due to unpredictable data bandwidth usage from internal and external users, we frequently experienced degradation in event quality due to less-than-optimum connection speeds. Eventually, United Way of America agreed to create a stable



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production environment by funding the construction of a dedicated webinar production room. The dedicated production room allowed producers to control sound quality, cameras, Voice over IP broadcast, and any other factors that were required for a large-scale event without having to worry about setting up and taking down all of the computers and equipment before and after each event. The dedicated room was also wired with additional bandwidth to make our online events less susceptible to periodic heavy internet and bandwidth usage.

Initially, the greatest single resistance to the United Way Live concept was a debate around financing the project. In the years leading up to UWL, each internal function within United Way of America had, to some extent, managed their own communications budgets. As a result of this decentralized management of funds, no single group could champion the project and front the financial investment required to make it a success. The decision to fund the project had to be made on an organizational level. In the end, the potential value and benefits of United Way Live proved to be a strong argument for the collective purchase of the product for the entire organization. The functional groups finalized the contract with Adobe, pooled their communications budgets, and purchased the tool. They have been managing UWL as a collaborative purchase ever since.

Another important challenge the United Way of America faced in implementing the Adobe Breeze platform was changing the internal culture and perceptions regarding traditional communication techniques. Many UWA staff had to be convinced United Way Live was not a passing fad, that it brought value to their daily work, that it would provide additional opportunities to connect with their key contacts and that it would truly advance the mission of the United Way.