

# UNITED WAY OF THE MIDLANDS' 3 YEAR STRATEGIC PLAN

JULY 2021

United Way  
of the Midlands



# Starting from a Position of Strength

Nearly 10 years have passed since United Way of the Midlands (UWM) updated our mission and structure through a strategic planning process. In that time, UWM has launched an open, multi-year competitive investment process and refined reporting processes to better understand the impact of donor investments. Together with our network of donors, thought leaders and community partners, we've responded to a regional flood and international pandemic that stressed the nonprofit sector and put thousands more people in need. Our community has seen philanthropy evolve, propelling UWM beyond traditional campaigns into new partnerships and funding opportunities. Since our last strategic plan, UWM was also recognized nationally for operational efficiency. In sum, the principles established through the 2012-2013 strategic plan created the foundation for UWM to meet challenges and create opportunities – it transformed our organization and remains instrumental to UWM's work today.

And we believe the best is still yet to come.

UWM's board of directors commissioned a Strategic Planning Task Force of 14 business and community leaders to update our strategic plan, and extend our impact even further. They challenged the Task Force to reflect on our accomplishments, take advantage of our strengths, and develop a road map that looks 3 years ahead.

## *How do we leverage our lessons learned and organizational strengths to increase impact, grow funding, and continue fiscal stewardship?*

The Task Force worked together over five months to make meaningful revisions that reflect both UWM's longstanding position, and the evolution of community needs and philanthropic trends. In doing so, the Task Force sought input from more than 250 business leaders, philanthropists, young professionals, nonprofit agency staff, and UWM team members. These stakeholders reinforced UWM's unique community-wide perspective, and ability to bring people together to address our area's toughest challenges. In doing so, they called on UWM to lead, engage and collaborate to ensure the path to opportunity is open and accessible – so everyone in our community can participate, prosper and reach their full potential.

# Key Updates

A revised mission that is more inclusive and inspiring, with updated strategies and simplified messaging based on lessons learned.

Based on community input, the task force recommended additional operational directives.

A few highlights include:

- Focus on social and economic disparities
- Advance our commitment to diversity, equity and inclusion
- Provide a more personalized path for giving
- Engage businesses to help meet ESG (Environmental, Social, Governance), CRA (Community Reinvestment Act) and other philanthropic commitments
- Return to multi-year funding, streamlining applications and reporting

## UWM's New Mission:

We **UNITE** our community's **CARING SPIRIT** to build a **STRONGER** tomorrow.

Throughout multiple channels of outreach and dialogue, stakeholders highlighted UWM's unique ability to strengthen connections and build community. Donors, agency partners and staff emphasized the desire to come together to find ways to help our entire community – which is both personal to ourselves, and to our neighbors. Unity, strength, spirit and community emerged from UWM's Donor Engagement and Marketing Committee, and the strategic planning task force, as key words that inspire a sense of purpose.

The task force also discussed UWM's explicit use of poverty in the mission statement – considering that use of the term was alienating, negative, pejorative, and not necessary. Stakeholders indicated that leading with poverty alienated people from feeling included in the existing mission statement; it may have prevented people living above poverty from seeking support if they were struggling. Many people oscillate in and out of the margins of poverty, and we've also seen a rise in newly in need. Agencies also shared that COVID has shown how many people are one paycheck away from financial instability. Through our investments and partnerships, UWM is helping a lot of people, with many different needs. Explicit use of the word poverty may have also inadvertently reinforced stereotypes that undermine the complex social and economic disparities at play.

Instead, with the new mission statement, the Task Force sought to reflect the interdependence of the human spirit, and present a more inclusive and compassionate organization. The new mission statement does not target a specific population or issue of need, rather it inspires neighbors to support neighbors. It invites everyone to participate, and it shows we all benefit from the collaborative work of United Way.

# Strategies to Guide Our Work

Community dialogue also shaped revisions to organizational strategies. These strategies reflect community expectations for the work of UWM. They also serve as a reminder of UWM's trusted position and guide the UWM team in daily operations.

## 1. *Grow engagement and funding by strengthening partnerships with new and existing donors*

UWM's work as a fundraiser powers the rest of the organization – and the many others who rely on our support to deliver critical services. Pro-active engagement fosters strong, lasting relationships built on trust. Stakeholders acknowledged UWM's unique access to the workplace; these campaigns remain the primary channel of UWM fundraising, and offer individuals across the metro area an opportunity to participate in philanthropy and support their community. However, workplace and workforce changes, combined with technology, information and access expectations have impacted the way people give. To augment workplace campaigns, UWM must grow engagement and develop strong partnerships with new and existing donors.

## 2. *Connect and inspire through year-round communications that build awareness and foster a caring spirit to give and volunteer*

UWM's community-wide perspective creates opportunities to increase broad awareness about critical needs, and inspire action across a range of human and financial resources. From issue-based marketing campaigns to targeted giving days, stakeholders stressed that UWM's communications should clearly identify our unique value and inspire confidence through transparency. As UWM continues to connect to individual donors through workplace campaigns, communications should foster long-term relationships with generous members of our community – building trust in UWM as a steward of both time and resources.

## 3. *Guarantee operational efficiency to be an effective steward of donor funds*

Operational efficiency is imperative to UWM's operating model. Donors trust UWM to be efficient stewards of available funds and maximize resources so that the power of our collective investments are greater than the sum of individual gifts. UWM has often been recognized nationally for operational efficiency and campaign performance – an accomplishment that needs more attention to secure continued donor support and combat misperception. Ultimately, this allows UWM to invest more into the community on behalf of individual, corporate, and private donors.

**4. Maximize impact of donor dollars through investments that address our region's most immediate needs and systemic issues**

UWM maintains a broad scope of community investments to address challenges that may be both chronic and acute, long-lasting and temporary. This provides tremendous value to donors who seek to impact a lot of people all at once; it can be the foundation of a corporate community impact. The pandemic demonstrated how many families are one paycheck away from instability, and also exposed systemic disparities. Donors expect UWM to help a lot of people all the time in whatever need circumstance they may experience. UWM can further affect systems change by impacting how resources flow.

**5. Convene local partners to foster effective and integrated solutions in response to local needs**

Unlike other organizations, UWM has the power to unite across the nonprofit, business and government sectors. These stakeholders all recognize UWM's position to harness the full power of our community – building actionable partnerships and sharing what we know. Evolution continues toward a best-practice model with increased engagement, partnership and ultimately impact.

**6. Drive progress by leveraging data to determine needs, measure impact and guide continuous improvement**

UWM provides valuable discernment to donors through data-driven decision-making processes. Through results-based accountability, we measure the full scope of our work – identifying areas where progress has been made, and where continuous improvement is necessary. Sharing this information in accessible formats inspires confidence, attracts investors, and saves the donor time. With a library that includes community need data and program reporting, stakeholders are increasingly approaching UWM for information regarding community conditions and the pulse of the nonprofit sector.

**7. Foster a positive workplace culture that is both rewarding and results-orientated in order to recruit and retain a diverse and talented team with a heart for the mission**

UWM has invested in its staff and infrastructure to adapt to changing circumstances and enhance the employee experience. We also serve a diverse population and strive to retain a talented team that reflects our community, and is passionate about building community.

# Organizational Objectives

In addition to a new mission statement and revising strategies, several themes emerged across stakeholder dialogue that both validate UWM's current trajectory and offer opportunities for even greater impact. These themes complement UWM's mission and strategy work, and provide actionable work for the years ahead.

## ***1. Lead a coordinated, community-wide effort to provide basic needs to help eliminate social and economic disparities***

- ***Repackage areas of work to reflect this focus***
- ***Address both systemic and immediate barriers***
- ***Provide direct services to fill community gaps***

With the removal of poverty from the mission statement, the Task Force felt it was critical for UWM to define its commitment in terms of leadership, coordination, basic needs and social and economic disparities. As part of its dialogue, the Task Force reinforced UWM's longstanding efforts within basic needs and expanded this category to reflect the wider scope of services families need to thrive – both temporary conditions and root causes. This “solving mentality” is different than serving people with acute or temporary needs. Poverty may not be necessary as a term, but it is important to acknowledge the scope of different need situations UWM works to address. The Task Force also suggested UWM repackage its areas of work in terms of issues to reflect this overall focus, which has a beneficial secondary effect of incorporating cause-based giving trends. Such definition around UWM's areas of work provides clarity to stakeholders.

## ***2. Advance diversity, equity and inclusion through investments, partnerships and organizational culture.***

With this commitment, comes an obligation to advance diversity, equity and inclusion. Agencies, business leaders, and local philanthropists expressed significant interest in this area – seeking information about UWM's efforts and resources. When client demographic information was shared broadly, stakeholders encouraged UWM to highlight this information and showcase our existing and long-term efforts to support people of color. Looking ahead, donors expect UWM to take a leadership role in advancing equity both through our investments, and across our community. In doing so, UWM would want to partner and support existing organizations doing this important work.

### ***3. Expand UWM's position as a key community partner and convener***

- Further leverage UWM volunteer leadership to connect with other community leaders***

These operational objectives require UWM to further expand our position as a key partner and convener. Throughout task force meetings and additional outreach, UWM was highlighted for its value as a trusted collaborator. Donors and agencies recognize UWM's unique ability to forge cross-sector partnerships and inspire connection.

To this end, stakeholders challenged UWM to leverage its strongest supporters to further ignite the caring spirit of collaboration and partnership. UWM has the ongoing privilege of strong support from area CEOs, administrators and other leaders who champion the work of UWM. Through peer to peer dialogue these leaders can be instrumental in securing human and financial capital to advance our work.

### ***4. Simplify how we talk about our work***

- Provide clarity around impact and stewardship***
- Offer more interactive content, volunteer, and engagement opportunities***

Throughout dialogue and outreach, stakeholders reinforced the importance of simple messaging. Key informants, in particular, recognized UWM communications continue to improve and suggested UWM particularly highlight the impact of investments, and operational efficiency. UWM's emerging leaders further suggested increasing interactive opportunities related to both data and volunteerism; these efforts give individuals a more direct connection to the impact of their investments and satisfies their interest for accountability.

### ***5. Establish performance impact goals and community indicators to reflect strategic plan***

Task Force members validated UWM's focus on data analysis. Having public goals and documentation of progress, and impact of programs on trends, may be a way to enhance this effort. Overall, the task force members said United Way has done an excellent job reporting data and providing metrics. As we grow the organization, it is important to share the full scope of our impact across multiple lines of investments.

### ***6. Engage businesses to fulfill their Environmental, social, and governance (ESG), Community Reinvestment Act (CRA) and other philanthropic commitments***

Through conversations with key informants, we learned about increasing thresholds for especially large companies in the region for meeting corporate social responsibility requirements. Stakeholder groups are calling on companies to not only do more on key sustainability topics, but also to be more transparent about their efforts. ESG criteria are a set of standards for a company's operations that socially conscious investors use to screen potential investments. CRA criteria are specific to financial institutions. These socially-conscious corporate efforts are opportunities for UWM to leverage its expertise and work with companies to satisfy their business requirements that also strengthen our community. Task force members recommended UWM engage corporate partners and provide reporting to meet their philanthropic commitments.

## ***7. Expand flexible and adaptive operations to respond to our area's toughest challenges (Including 211, Goodfellows, JAG Nebraska, Mental Health, Housing, etc.)***

- Ensure funds are available to provide this flexibility***

We've seen the advantages of multi-year, program funding. And while this provides important efficiency and reliability for nonprofits, we have also observed the need to be responsive to emerging needs and crises. Throughout these situations, we've heard from agencies who seek to redistribute funds within their program or organization to areas where funds are needed most based on changing conditions. UWM must continue to engage and have dialogue to ensure the careful stewardship of donor dollars, while providing flexibility given current circumstances. The Task Force recognized a small amount of funds may be identified to provide flexibility for investment opportunities that respond to needs that arise outside of the typical funding cycle.

## ***8. Provide a personalized path for giving that accounts for generational changes (ex: Endowment, Legacy Gifts, Step-up Opportunities, and Digital etc.)***

During dialogue regarding generational changes, the Task Force explored multiple opportunities for UWM to connect with donors wherever they may be in their philanthropic journey. Netflix and Amazon have been able to close the generational divide by developing a personalized path that recognizes the unique interests and preferences of individuals. For younger donors this may include digital engagement or interactive opportunities as indicated above. The Task Force recommended a step-up program to elevate the giving potential among these donors. Likewise, the Task Force discussed donors near the end of their earning potential who want to continue to give into retirement, and recommended UWM create opportunities for legacy giving to an endowment or other areas of interest.

## ***9. Return to multi-year funding, streamlining applications and reporting while maintaining investment standards***

Task force members overwhelmingly endorsed a return to UWM's two-year grant cycle. As a best practice, the two-year cycle helps strengthen agency partnerships, collaboration, and provides agencies with an ability to predict and plan. In all World Cafes, agencies highlighted the benefits of streamlined applications and reporting requirements during the last two investment cycles. A handful of key informants also mentioned that after the last strategic plan, UWM investment requirements became a significant burden for applicants. Foundations and agencies are looking for UWM to continue to balance the need for information with the capacity of organizations in our process.

## ***10. Update UWM Guiding Principles to reflect culture and goals***

Working with staff, UWM will update its guiding principles to reflect the core values we hold dear as an organization. These values will be integrated into performance review and staff recognition, and further establish UWM as a leader in building community.



## Conclusion

The work of the Task Force largely reinforced the trajectory of UWM, with careful refinements to ensure the organization stays on course and in alignment with the needs of our community, and intent of our donors. While UWM will follow this roadmap for the next three years, many of these refinements will be immediate to account for fundraising and investment cycles. For instance, donors can expect more active relationship management and simplified messaging in our 2021-2022 campaign. In the 2022-2024 application cycle, programs will be expected to outline how their work addresses social and economic disparities and aligns with UWM's issue-based investment priorities. These priorities will be identified over the summer, and aligned with community indicators, performance goals and corporate philanthropic reporting structures. UWM will also develop parameters for investments in diversity, equity and inclusion beyond the traditional community care fund – investing in programs that advance this important work in the community.

Ultimately, these refinements reflect a commitment to inclusivity and collaboration, and recognition of our interdependence as a community. They respond to specific lessons learned, and organizational strengths identified through rich dialogue across stakeholder groups. UWM's new strategic plan further elevates UWM's position as a collaborative partner and steward of donor dollars – and acknowledges the privilege of serving in this trusted leadership position.

# UWM STRATEGIC PLAN AT A GLANCE

<p>A revised mission that is more inclusive and inspiring</p>	<p>We <b>UNITE</b> our community's <b>CARING SPIRIT</b> to build a <b>STRONGER</b> tomorrow.</p>				
<p>Revised strategies that reflect community expectations and guide the work of UWM</p>	<ol style="list-style-type: none"> <li>1. Grow Engagement and Funding</li> <li>2. Connect and Inspire</li> <li>3. Guarantee Operational Efficiency</li> <li>4. Maximize Impact</li> <li>5. Convene Local Partners</li> <li>6. Drive Progress by Leveraging Data</li> <li>7. Foster a Positive Workplace Culture</li> </ol>				
<p>Operational objectives that provide additional, tangible action items</p>	<p>1. Lead effort to address social and economic disparities – reaffirming our commitment to basic needs</p>	<p>2. Advance diversity, equity, and inclusion</p>	<p>3. Expand our position as a key community partner and convener</p>	<p>4. Simplify how we talk about our work with clarity around impact, stewardship and interactive opportunities</p>	<p>5. Establish performance impact goals and community indicators</p>
<p>6. Engage businesses to fulfill their philanthropic commitments (ESG, CRA, etc.)</p>	<p>7. Expand flexible and adaptive operations to remain responsive</p>	<p>8. Provide a personalized path for giving</p>	<p>9. Return to multi-year funding – streamlining while maintaining investment standards</p>	<p>10. Update UWM Guiding Principles to reflect culture and goals</p>	