

TOWARD A STRONGER TOMORROW

United Way of the Midlands Strategic Plan

July 2024 – June 2027



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BACKGROUND + PROCESS

In 2021, United Way of the Midlands (UWM) updated our strategic plan to build off lessons learned since transformative changes were made to the organization from 2012-2015. Considering UWM’s organizational strengths and unique community role, the 2021 strategic plan updated the UWM mission statement, purpose, guiding principles and set new goals through 2024. New strategies and key action items also emerged from that planning process. UWM made remarkable progress against these strategies over the last three years – returning to multi-year funding, growing JAG Nebraska and the 211 Helpline, simplifying our messaging and reaffirming our commitment to addressing social and economic disparities. We crossed our 100-year milestone with excitement for what’s to come.

Recognizing the speed of change and importance of organizational evolution, the board guided UWM to refresh its strategic plan every three years. The 2024 strategic plan builds upon the 2021 plan by retaining our mission statement, guiding principles and purpose. Recognizing the evolution of our organization, the plan will focus on reviewing and updating the strategic directives for UWM to execute over the next three years.

| FOCUS OF STRATEGIC PLAN | |
|--|-------------------------------------|
| Update strategies with particular attention to the following: <ul style="list-style-type: none"> • Maximizing the philanthropic capacity of our community • Highlighting UWM’s unique attributes and role within the sector • Providing discernment and direction for new opportunities | |
| WHAT WILL NOT CHANGE | WHAT WILL BE UPDATED |
| Mission Statement Purpose Guiding Principles | Strategies Branding UWM Goals |

Because this strategic plan is a refinement, as opposed to a reset, UWM's executive committee led the process with support from the Board of Directors and input from across the community. In summer of 2023, UWM completed a *Signals and Trends Report* that combines existing research with data unique to UWM, including feedback from our investment partners and program participants. Overall, our goal was to develop a deeper understanding of current conditions to better focus UWM and community efforts to create positive change. To expand upon those findings, the executive committee and UWM senior team conducted 30 key informant interviews. Conversations explored trends and areas where stakeholders want to see UWM grow and thrive. From January to March, the executive committee held a series of meetings to prioritize findings and develop strategies to guide UWM for the next three years. These strategies complement the mission statement, purpose and guiding principles previously established in 2021.

SPECIAL THANKS to OUR KEY INFORMANTS

John Albin, Nebraska Commissioner of Labor
Dave Anderson, KPMG
Mogens Bay, Valmont Industries
Dana Bradford, C3 Brands
Susie Buffett, Sherwood Foundation
Tim Burke, OPPD and Omaha Chamber (retired)
Mike Cassling, Cquence Health Group
Pat Corrigan, ACCESSBank
Jason Hansen, American National Bank
Rhonda Hawks, Hawks Foundation
Cindy Heider, Heider Family Foundation
Kimberly Kolakowski, Family, Inc.
Ty Kreitman, Federal Reserve Bank
Clark Lauritzen, FNBO
John Levy, John & Dianne Scott Family Foundation

Dave Lopez, Chief of Staff, Governor Jim Pillen
Rodrigo Lopez, Amerisphere Financial and Children's Nebraska (retired)
Mike McCarthy, Bridges Trust
Mike McDonnell, Nebraska State Senator and President Omaha Federation of Labor
Brenda Mainwaring, Iowa West Foundation
Heath Mello, Greater Omaha Chamber of Commerce
Dianne Seeman Lozier, Lozier Foundation
Jeff Russell, Blue Cross Blue Shield of Nebraska
Deb Sprecker, Heistand Foundation
Elisha Suttle, Licensed Therapist
Tom Warren, Chief of Staff, City of Omaha
Katie Weitz, Weitz Family Foundation
Beth Whited, President, Union Pacific Railroad



MISSION

The strategic planning process affirmed UWM's mission. Donors, agency partners and staff emphasized the unique role of UWM to bring people together, drive collaboration and inspire philanthropy – all to ensure our community can thrive. Our mission statement continues to reflect the interdependence of the human spirit, and an inclusive and compassionate organization that inspires neighbors to support neighbors.

We Unite Our Community's Caring Spirit to Build a Stronger Tomorrow

PURPOSE

Unlike other organizations, UWM has the power to unite across the nonprofit, business and government sectors to address challenges across the metro. Our purpose is reflected in 7 core competencies that define the unique strengths and capabilities that set UWM apart, and enable us to deliver value. They reflect the collective knowledge, skills, and resources that we bring to the nonprofit sector and community as a whole. UWM's work as a fundraiser supports hundreds of programs and powers the rest of the organization – and our community-wide perspective creates opportunities to increase awareness about critical needs and inspire action. By prioritizing accountability and stewardship, UWM provides a vehicle for individuals across the community to contribute efficiently and effectively in a wide range of data-driven programs and services.



UWM's organizational purpose reflects community expectations for the work of UWM and serve as a reminder of UWM's trusted position. Moving forward, it is crucial that we uphold the purpose outlined in our 2021 strategic plan. This anchors us to our core competencies and unique strengths as we forge ahead into the future.

- **Grow engagement and funding** by strengthening partnerships with new and existing donors
- **Connect and inspire** through year-round communications that build awareness and foster a caring spirit to give and volunteer
- **Guarantee operational efficiency** to be an effective steward of donor funds
- **Maximize impact** of donor dollars through investments and direct services that address our region's most immediate needs and systemic issues
- **Convene local partners** to foster effective and integrated solutions in response to local needs
- **Drive progress by leveraging data** to determine needs, measure impact and guide continuous improvement
- **Foster a positive workplace culture** that is both rewarding and results-oriented in order to recruit and retain a diverse and talented team with a heart for the mission

GUIDING PRINCIPLES

Our staff-developed guiding principles continue to shape how we approach our work. These guiding principles serve as the foundation of our organizational culture, reflecting our commitment to excellence and integrity in all endeavors.

- Build **TRUST** in everything we do
- Extend **GRACE** by thinking beyond yourself
- Show **GRIT** by bringing it every day
- Be **OPEN** to embrace others' differences
- Actively **ENGAGE** by listening and sharing
- Live **CURIOUSLY** to learn constantly



***NEW* STRATEGIES**

The executive committee developed new strategies to extend UWM's mission and purpose, and provide actionable work for the years ahead. These board-approved strategies emerged across stakeholder dialogue and both validate UWM's current trajectory and offer opportunities for even greater impact. Each strategy is a dynamic directive that reflects UWM's commitment to continuous improvement and adaptation – empowering UWM to remain agile in an evolving landscape, enabling the organization to seize emerging opportunities, address evolving challenges and ultimately fulfill its mission of creating lasting, positive change.

1. Secure the future by mobilizing and highlighting the next generation of philanthropists and leaders

- Support a culture of philanthropy with goals to increase participation
- Showcase the next generation of philanthropists in action
- Work at the organizational level to foster Bridgebuilder donors
- Develop an endowed giving strategy as a path for donors to create an enduring legacy and ensure UWM has capacity to accept alternative, non-cash contributions

This strategy for UWM embodies a forward-thinking approach to philanthropy, emphasizing the importance of inclusivity and engagement across generations. By supporting a culture of giving and increasing participation, UWM aims to bridge generational divides and empower individuals of all ages to contribute meaningfully to their communities. Showcasing the next generation of philanthropists not only highlights the positive impact younger donors are making but also challenges stereotypes. Moreover, the focus on fostering Bridgebuilder donors underscores UWM's commitment to building connections and relationships. An endowed giving strategy provides a pathway for donors to create a lasting legacy, ensuring their impact continues to be felt for generations to come.

2. Expand through new corporate partnerships and engage business leaders to maximize the philanthropic capacity of the corporate sector

- Offer a playbook and toolkit on how to partner with UWM and fresh opportunities to engage employees
- Leverage peers and other community outreach (*ex: Chamber, City, DED*) to develop new partnerships among existing and emerging metro-area businesses, including companies looking to relocate here
- Lean into volunteerism and payroll deduction as key value adds

With a rich tradition of giving and a robust economic landscape, there exists tremendous philanthropic potential in the Omaha-Council Bluffs metro. As a trusted partner, UWM offers tailored and diverse opportunities for engagement, catering to the unique needs and interests of corporate partners. We will strive to make this a simple, but significant process. This strategy not only facilitates deeper connections with existing partners, but also enables UWM to expand its reach and impact by attracting new corporate allies to join in its mission of driving positive change in the community.

3. Bring UWM's value proposition and compelling communications to donors, highlighting UWM as the most efficient and effective way to address a wide scope of essential, community needs

- Showcase UWM's focus on cultivating healthy communities, promoting financial security, advancing youth opportunity and strengthening community resiliency in line with global branding.
- Promote awareness of the Community Impact Fund, showcasing UWM's commitment to community-driven funding decisions and empowering local participation in driving change
- Highlight UWM's efficiency, accountability, discernment and impact on philanthropy
- Deliver custom messages through segmentation – helping audiences see themselves in UWM



Stakeholders highlighted several factors that make UWM the optimal vehicle for investment. This includes unparalleled operational efficiency, which maximizes the impact of every dollar donated to invest in a broad portfolio of programs. This strategy renews UWM's commitment to addressing widening social and economic disparities amid economic uncertainty – and incorporates updated branding that better reflects our commitment to a thriving community. Part of this strategy includes being more visible in the community, engaging neighbors, facilitating community involvement and showcasing the collective spirit of our community. Stakeholders particularly stressed UWM's discernment, utilization of community volunteers in determining funding and reporting standards. In a crowded nonprofit landscape, UWM's discernment impacts the broader philanthropic sector and this leadership is important to share with donors who might otherwise designate funds. While donors value efficiency, we also know that individuals have different passions – to inspire confidence we need to communicate about the issues donors identify with most.

4. Recognizing UWM's diverse donor base and partnerships, preserve a neutral policy position on legislative interests other than advocacy for UWM's direct service programming

- Stay tuned in to policy discourse through active participation with corporate, nonprofit and legislative partners
- Engage stakeholders as key informants by leveraging data and partnerships

By staying attuned to policy discourse through active engagement with corporate, nonprofit and legislative partners, UWM remains informed about key issues impacting the metro area. Leveraging data and partnerships, UWM serves as a key informant, providing valuable insights to inform decision-making processes. In a time marked by heightened political polarization, UWM's commitment to neutrality fosters collaboration and unity, positioning it as a trusted source of information and support regardless of political affiliations. This strategy not only strengthens UWM's role as a unifying force within the community, but also reinforces its dedication to prioritizing the well-being of those it serves.

5. Serve as a trusted partner for implementation of grant processes and direct service programming that align with UWM's mission and focus areas

- Harness UWM's capacity, reach and efficiency to fill gaps and enhance existing community services
- Establish UWM as the preferred option for grantmaking, information and referral, navigation and other public-private partnerships
- Continue to ensure responsible stewardship through separation of funds, and additional safeguards that maintain donor intent and protect UWM's financial integrity

While UWM has a longstanding reputation as a fundraiser, it is increasingly recognized as a vital partner in both grantmaking and delivering direct services. The City of Omaha trusted UWM to implement its basic needs ARPA funding process, for instance. The success of our Emergency Rental Assistance Programming from 2020-2022, and current expansion of programs like 211 and JAG Nebraska, showcase UWM's expertise in delivering direct services. By leveraging UWM's capacity and infrastructure, the community can optimize resources to fill gaps and enhance existing community services more efficiently. With any additional programming, UWM's commitment to stewardship remains paramount to securing and maintaining donor trust. As UWM is increasingly invited to new partnerships, the executive committee directed use of internal criteria to ensure stewardship and alignment of future initiatives. UWM will accept calculated risk to drive positive change in our community. We implement robust financial, staffing and other operational controls to mitigate potential risks ranging from temporary programming to delayed reimbursements. Our commitment to realistic and transparent timelines, alignment, strong partnerships and secured revenue creates conditions for successful endeavors – whether short or long term.



6. Set an example of efficiency and operational excellence by leveraging technology to streamline processes, enhance productivity and drive innovation throughout the organization

- Establish a committee of industry experts to help UWM monitor technological advancements and security trends, ensuring our systems and processes evolve
- Facilitate opportunities for staff to reimagine processes for greater efficiency
- Leverage UWM's new space to promote collaboration, reduce duplication and increase efficiencies for our organization and across the nonprofit sector

Advanced technologies can play a critical role in driving greater impact and stretching donor dollars further. UWM can provide sector leadership by staying abreast of emerging technologies and leveraging new tools and platforms to better serve the needs of the communities we support. Our staff is central to both identification and implementation of new technologies. By providing opportunities for our team to innovate and reimagine processes, we foster a culture of creativity and continuous improvement. To complement these internal efforts, UWM will establish a committee of experts to monitor advancements and evaluate opportunities – which includes ensuring UWM continues to have robust cybersecurity measures to protect sensitive data. This proactive approach to technology not only safeguards the trust of our donors and partners, but also ensures the integrity of our operations.

***NEW* BUILDING AND BRANDING**

As we began our strategic planning process, we began to realize our space at the Federal Reserve Bank did not meet the needs of our growth. With the full support of our Board of Directors and executive committee, UWM relocated to the Ashton building within Millwork Commons in Spring 2024, secured through a signed, 7-year lease as a sublet from WP Engine. WP Engine graciously offered us an in-kind contribution toward our rent, all of the existing furniture and technology currently in the space and with minimal buildout required to make the space compatible for our operations. Other partners also made donations or reduced pricing to make this move possible including HDR, JE Dunn, Lamson, Dugan & Murray LLP, Integrated MSP and AOI. The new space not only accommodates our expanding team but also positions us within a vibrant community of innovation, with 70 nearby businesses and nonprofits. It will also provide space that other nonprofits can leverage for meetings and events that is welcoming to all guests. This relocation underscores our commitment to stewardship, and ensures that our workspace reflects our trusted position, fosters collaboration and creates opportunities for future growth and impact.

Similarly, United Way Worldwide is completing a multi-year brand transformation to refresh and renew its market position with new logos, colors and focus areas. UWM's CEO, Shawna Forsberg, contributes to the Network Advisory Council, offering valuable insights and direction to align these national initiatives with local endeavors. Drawing from industry research and best practices, the new branding will help us resonate more deeply with our community and build momentum for the work. It also provides UWM with an opportunity to celebrate our unique community and identity, and promote undesignated gifts to the Community Impact Fund. As early adopters of revitalized branding, we aim to engage stakeholders more effectively and continue driving positive change toward our shared vision of a thriving community. Our implementation further positions us as a leader within the network of United Ways, as we simultaneously craft a strategic plan to help us collaborate and lead across the metro area.

UWM embraced these updates and opportunities, integrating them into our strategic planning for the future.

United Way of the Midlands enters a new era with a steadfast commitment to our mission. Through research, data analysis and stakeholder dialogue, we have gained valuable insights – driving new strategies for greater efficiency and effectiveness. Refreshed branding and a collaborative office space will bring people together for even greater impact. The path forward aligns our efforts with the intent of our generous donors to accomplish our mission:

To Unite Our Community's Caring Spirit to Build a Stronger Tomorrow

