

United Way of Central Indiana Board Meeting

Strategic Plan: Goals & Objectives

December 7, 2022

**United Way
of Central Indiana**



Timeline / Next Steps

Phase 1 – Strategic Goals / Objectives coming to an end

- **November**
 - Visions/viewpoint meetings with team members
 - Small group meetings with board members
 - Meetings with key stakeholders
- **December**
 - All team meeting December 1st
 - Board meeting December 7th (strategic goals and objectives)
 - Wellspring work completed December 9th
 - Goals, objectives, initiatives, initiative details
 - 18-month implementation plan

Phase 2 – Strategic Initiatives implementation planning ramping up

- **Q1 & Q2 2023** operationalize initiatives
 - Internal workgroups to operationalize plan
 - Additional research on impact focus areas
 - Community engagement meetings to gain feedback
 - Annual Board retreat
- **7/23 begin** executing with new fiscal year 

United Way has the opportunity to further leverage its assets to move individuals and families out of poverty

Current state

Poverty is caused by a myriad of complex systemic and institutional issues; it is difficult to overcome and often perpetuates intergenerationally

Poverty alleviation efforts have typically focused on short-term supports, and key players are often disjointed in their efforts

Central Indiana has more than 220,000 households living in or near poverty

- The Covid-19 pandemic exacerbated the economic and social disparities of individuals and families living in or near poverty and had a disproportionate impact on African-Americans.

United Way's opportunity

Research shows that government, corporations, philanthropy, and the social sector must work together as partners to break the cycle of intergenerational poverty

- United Way is in a unique position to bring these players together

Through this strategic plan, **United Way will coordinate and amplify the efforts of these required partners, using data** and research to track progress, and advocating for systemic changes in **key areas** that will have the most impact on poverty

United Way gathered data through many sources and conversations to understand how to realize this opportunity

During a strategic planning process spanning a year and a half, United Way worked with Wellspring Consulting to conduct research, facilitate discussions and input from a myriad of sources, and determine how United Way is best positioned to support individuals and families moving out of poverty

The following is some of the work that informed the strategy:



25 external interviews with community partners, funders, fundraising analogs, and fundraising experts



44 ideation sessions participants from CBOs and impact partners



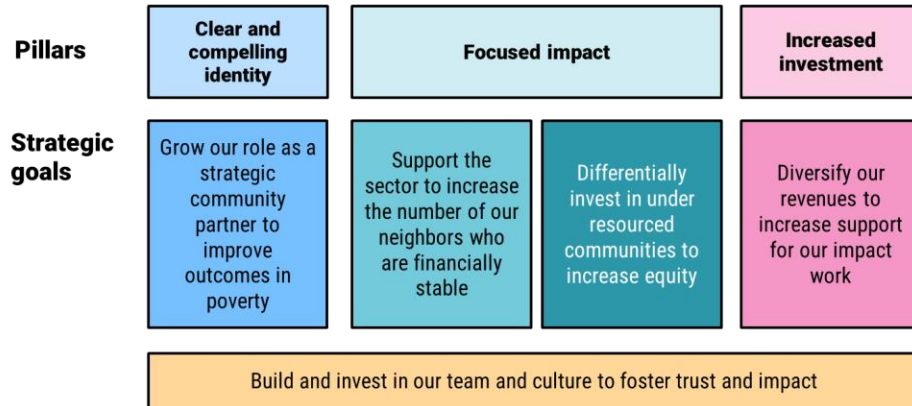
59 grantee survey respondents



23 interviews with other organizations, and desk research to learn about effective poverty alleviation strategies

All of United Way's strategic goals fall under three pillars and each has detailed objectives

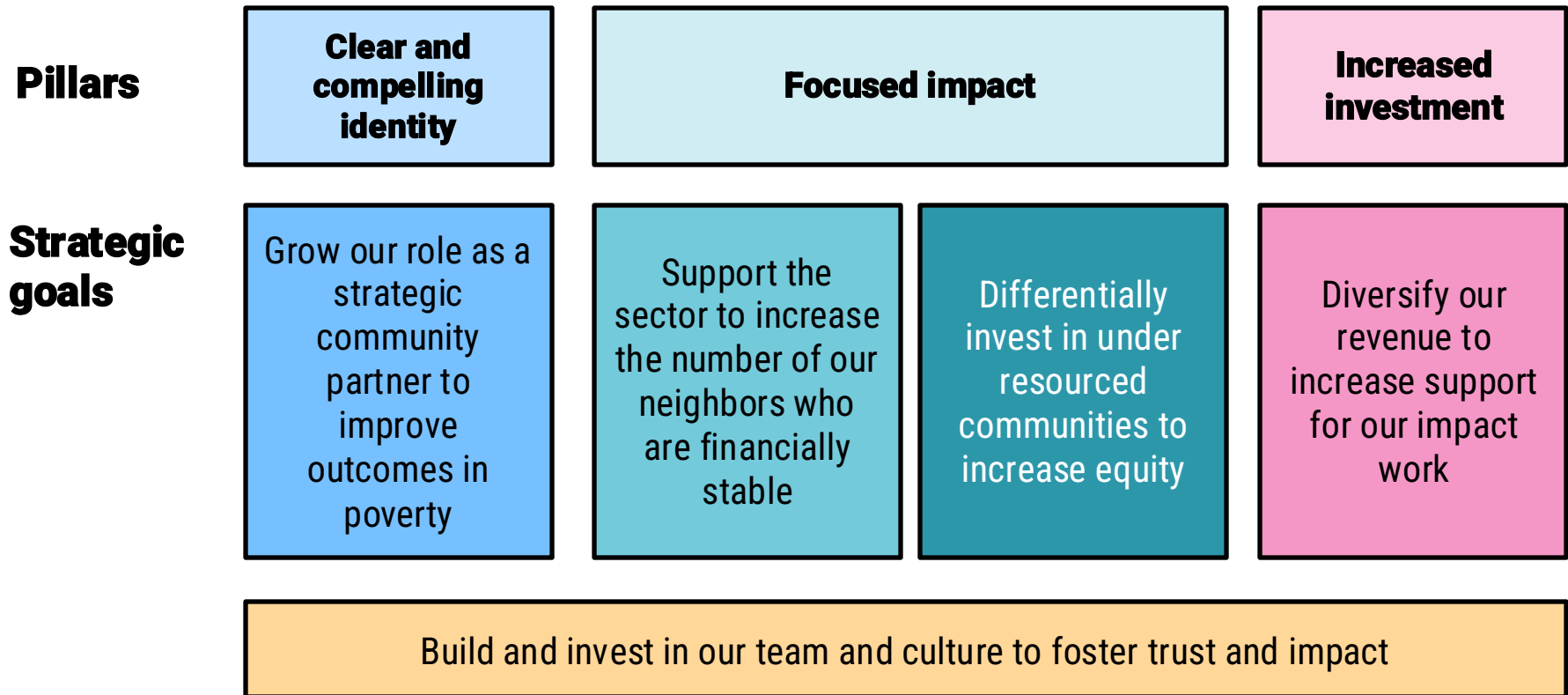
All of United Way's strategic goals fall under these three pillars



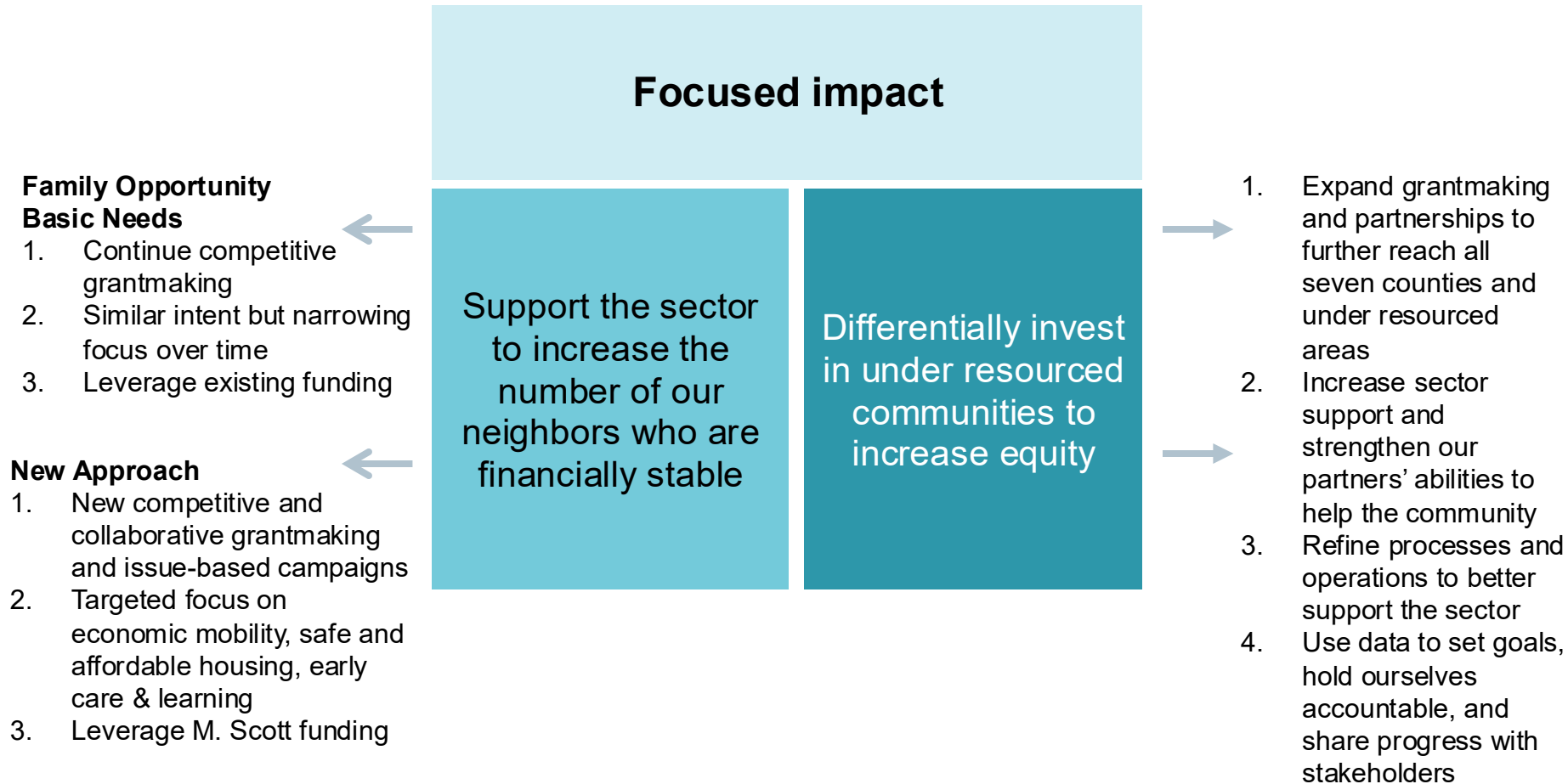
United Way's strategic goals and objectives

1	2	3	4	5
Grow our role as a strategic community partner to improve outcomes in poverty alleviation	Support the sector to increase the number of our neighbors who are financially stable	Differentially invest in under resourced communities to increase equity	Diversify our revenues to increase support for our impact work	Build and invest in our team and culture to foster trust and impact
A. Advance a clear understanding of our refined brand, value proposition and work	A. Leverage our toolkit to achieve individual and systems-level changes in safe and affordable housing, early care and learning, and economic mobility	A. Increase the types of organizations that have access to our support	A. Engage current and potential donors more deeply to increase retention, acquisition, and giving levels	A. Advance a culture of trust and belonging rooted in our core values
B. Strengthen our engagement with our community partners to maximize their impact	B. Invest in basic needs	B. Collaborate on data drive county-centric poverty reduction strategy for all seven counties	B. Diversify our revenue streams so we have a sustainable future	B. Develop growth and development opportunities to help retain and promote our team members
C. Collaborate with corporate, philanthropic, and gov't partners to achieve collective impact	C. Align our impact work by deploying targeted strategies and focusing on key populations	C. Establish metrics, and measure and report on our progress	C. Execute issue- based campaigns	C. Promote a meaningful and effective work environment through processes that support new roles and responsibilities

All of United Way's strategic goals fall under these three pillars



Focused Impact



UWCI's strategic goals and objectives

1	Grow our role as a strategic community partner to improve outcomes in poverty alleviation	2	Support the sector to increase the number of our neighbors who are financially stable	3	Differentially invest in under resourced communities to increase equity	4	Diversify our revenues to increase support for our impact work	5	Build and invest in our team and culture to foster trust and impact
A. Advance a clear understanding of our refined brand, value proposition and work	A. Advance innovative solutions and partnerships for safe and affordable housing, early care and learning, and economic mobility	A. Further diversify the family of organizations that have access to our support	A. Engage current and potential donors more deeply to increase retention, acquisition, and giving levels	A. Advance a culture of trust and belonging rooted in our core values					
B. Strengthen our engagement with our community partners to maximize their impact	B. Continue support of basic needs and family opportunity	B. Collaborate on data driven county-centric poverty reduction strategy for all seven counties	B. Diversify our revenue streams so we have a sustainable future	B. Develop comprehensive growth and development opportunities to help retain and promote our team members					
C. Collaborate with corporate, philanthropic, and gov't partners to achieve collective impact	C. Leverage our toolkit to achieve individual and systems-level changes	C. Establish metrics, measure and report on our progress	C. Execute issue-based campaigns	C. Promote a meaningful and effective work environment through processes that support new roles and responsibilities					

Objectives and initiatives to execute Goal 1

1

Grow our role as a strategic community partner to improve outcomes in poverty alleviation

A. Advance a clear understanding of our refined brand, value proposition, and work

- i. Develop **simple, consistent, and comprehensive** communications around our updated value proposition and impact approach
- ii. Ensure staff, Board, and volunteers understand, align with, and have the tools to share with others our updated impact approach
- iii. Engage external stakeholders to create understanding and buy-in regarding our updated value proposition and impact approach

B. Strengthen our engagement with our community partners to maximize their impact

- i. Build capacity for the sector to strengthen connections to content expertise and organizational development opportunities. (See 2C.i.)
- ii. **Streamline and simplify processes** for organizations seeking and accessing our funding and support
- iii. Further diversify the family of organizations that have access to our support (See 3A)
- iv. Regularly listen to, and **incorporate feedback from our community partners and neighborhood voices**
- v. Continue to **leverage the skills of our team to share our data** with community partners to support their work and fundraising

C. Collaborate with corporate, philanthropic, and gov't partners to achieve collective impact

- i. **Collaborate on impact strategies and co-develop impact targets** with corporate, philanthropic and government partners
- ii. Jointly map out each partner's role and dollar investment in achieving the agreed upon impact targets over several years
- iii. **Pilot interventions** and advocate for ongoing funding when successful
- iv. **Convene funders to pilot** aligning on metrics requested from grantees in one issue area

Objectives and initiatives to execute Goal 2

2 Support the sector to increase the number of our neighbors who are financially stable

A. Advance innovative solutions and partnerships for safe and affordable housing, early care and learning, and economic mobility

- i. Develop and launch **issue-based interventions and campaigns** with defined outcomes, timeline, impact partners, **collaborative grantmaking** to selected community partners, and a plan for long-term sustainability
- ii. Offer **competitive grant making** in the 3 issue areas

B. Continue support of basic needs and family opportunity

- i. Continue **competitive grantmaking** in basic needs and family opportunity, using simplified application and processes (see 1B)
- ii. Create plan to **narrow the focus of our basic needs funding** over the next 3 years
- iii. Identify gaps in services among the BIPOC population and across seven county region and **proactively seek out new partners** to fill those gaps

C. Leverage our toolkit to achieve individual and systems-level changes

- i. Build **capacity** for the sector to strengthen connections to content expertise and organizational development opportunities
- ii. **Advocate** to support long-term outcomes and funding
- iii. Continue to execute on a **data** strategy to ensure regular communication of impact through qualitative, quantitative, and longitudinal metrics
- iv. As needed, where there lack sufficient interventions, deploy innovative **programs** and initiatives in collaboration with the community that leverage our strengths to achieve impact
- v. Foster opportunities for **knowledge sharing, thought leadership** and convening among interested stakeholders

Objectives and initiatives to execute Goal 3

3

Differentially invest in under resourced communities to increase equity

A. Further diversify the family of organizations that have access to our support

- i. Build **relationships** with small organizations, particularly BIPOC-led and those in the outer counties, that focus on addressing barriers facing their communities, which align with our areas of focus
- ii. Increase the number of small and nonaccredited organizations we **support**, particularly BIPOC-led and those in outer counties

B. Collaborate on data driven county-centric poverty reduction strategy for all seven counties

- i. Determine **how** our resources (e.g., funding, toolkit, etc.) will be invested in each county
- i. Develop impact **approaches** in all seven counties to ensure we are having an impact on rural, urban, and suburban poverty

C. Establish metrics, measure and report on our progress

- i. Develop appropriate metrics to **guide and measure impact** of investment approach
- ii. Track the types of organizations we support, and the constituents these organizations serve, to **ensure we are meeting our targets**
- iii. **Report on our progress** to staff, the Board, and external stakeholders

Objectives and initiatives to execute Goal 4

4

Diversify our revenues to increase support for our impact work

A. Engage current and potential donors more deeply to increase retention, acquisition, and giving levels

- i. Communicate our newly-defined value proposition to our donors
- ii. Increase our capacity for the **cultivation and stewardship of major and transformational donors**, and prospect research
- iii. Bring greater structure to cultivating and stewarding our major and transformational donors resulting in more effective moves management
- iv. Pilot ideas to maintain and **optimize the workplace giving** funding stream
- v. **Pilot giving circles** to increase engagement of more diverse mid-level donors
- vi. Build intentional education and engagement opportunities for donors as issue area strategies are developed
- vii. Enhance the way we **highlight our work and impact with donors**, including our work with small and BIPOC led organizations

B. Diversify our revenue streams so we have a sustainable future

- i. **Increase grant revenue** from current and new funding sources, including **government** and **national foundations**
- ii. Develop a **multi-year grant revenue strategy** that allows us to plan for opportunities and understand current relationships that can be leveraged
- iii. Pursue **partnership and co-investment opportunities** with corporations and foundations

C. Execute issue-based campaigns

- i. **Collaborate with partners** to set the predetermined activities, timeline, partners, and cost of the issue-based campaign, including collaborative grantmaking
- ii. Ensure giving circles are aligned with the issue-based campaign
- iii. **Leverage issue-based campaigns** to support fundraising for all UWCI's donor audiences
- iv. Communicate about the impact of campaigns

Objectives and initiatives to execute Goal 5

5

Build and invest in our team and culture to foster trust and impact

A. Advance a culture of trust and belonging rooted in our core values

- i. Complete current DEI plan and **create new DEI plan** using lessons learned from the current implementation
- ii. Engage in **intentional team building** within **and across teams**
- iii. Develop and implement an effective communication structure and **feedback loops**

B. Develop comprehensive growth and development opportunities to help retain and promote our team members

- i. Develop and communicate clear career pathways for team members
- ii. Benchmark best practices and revise **current performance review processes** to support ongoing staff development
- iii. Enhance leadership development for all levels of staff
- iv. Develop a **formal recognition / celebration plan** to recognize team members externally and expand internal recognition program

C. Promote a meaningful and effective work environment through processes that support new roles and responsibilities

- i. Ensure staff have **clear roles and responsibilities** through well-defined job descriptions and annual goals
- ii. Provide staff with the **right tools and training to fulfill their roles and responsibilities**
- iii. Ensure new hires have the skills, abilities and cultural competence to be successful in their jobs

What's Different

- Addresses all three distinct areas for evolution.
Previous plans did not include strategy for all three;
- Identifies three primary areas we will strategically lean into, inclusive of data driven place-based approaches;
- Intentional strategy around diversifying investments that are not necessarily tied to work-place fundraising.