



UNITED WAY OF JOHNSON & WASHINGTON COUNTIES

**STRATEGIC PLAN**

2016



## 2020 GOALS AND STRATEGIES

### EDUCATION

Improve success for children and youth by decreasing the preparation gaps by 1/3 for school, post-secondary and work. Strategies include focusing on early grade reading, high quality out-of-school time experiences and supporting students and families in addressing barriers to educational success.



## 2015 ASSESSMENT DATA

23% of the children in Johnson County are not reading proficiently by 4th grade.

### INCOME

Increase by 20% households in Johnson County that are financially stable. Strategies include efforts to increase earning potential, strategies and advocacy to reduce barriers to financial stability (i.e. transportation and childcare) and long-term planning on affordable housing and work/life balance.



Cost of living in the county is higher than the state as a whole resulting in 40% of working families walking a financial tight rope. 30% of our students qualify for free or reduced lunch in several of our school districts and the number of children living in poverty has increased 33% in the last 5 years.

### HEALTH

Increase by 1/3 the number of children and adults who are healthy and avoiding risk behavior. Strategies include focusing on access to mental healthcare, aging in place safely, transportation issues that affect access to health and wellness and addressing the social determinants of health that still create gaps and barriers to leading a healthy life.



23% of adults in Johnson County are obese.

29% of adults report eating 5 or more servings of fruit and vegetables per day.

# This Strategic Plan is more than a document.

It is a call to action to every individual, company and organization in our community to join United Way improving lives by connecting the needs to resources.

For over 97 years, United Way has taken seriously the responsibility of helping people in need in our community. Today, thousands of donors and volunteers look to United Way to provide solutions to the community's most pressing health and human service needs. Successfully addressing the challenges facing our community and its citizens requires leadership and planning. The Strategies set forth in this plan are intended to improve lives. This plan is for the next three years, but United Way understands that sustainable solutions will require working beyond this time frame.

This Strategic Plan is grounded on a foundation of collected data and stakeholder input. Over the past six months, the Board of Directors and Staff have developed and considered:

## SWOT Analysis

Nearly 100 stakeholder respondents provided a candid assessment of United Way's Strengths, Weaknesses, Critical Issues, External Obstacles, Market Opportunities and Internal Operations.

## Environmental Scan

Review of population demographics, economic conditions and community needs, fundraising landscape and giving trends, laws and regulations, and key challenges and awareness of United Way in the public.

The heart of this plan is to improve people's lives in Johnson and Washington Counties. Building a better future for all, United Way will help people immediately in need and create community solutions to reduce these needs in the future.

The plan highlights the importance of working collaboratively with organizations, businesses and individuals to make the 2020 Vision a reality. To be successful, United Way will need to inspire more people to give and volunteer by matching their interests and expertise with the work.

## The four parts of the Plan are:

- Improve Lives
- Increase Engagement and Resources
- Excel in Relationships and Partnerships
- Preserve Reputation

## Improve Lives and Drive Positive Change in the Community



**A**

Facilitate and support the work of the 2020 Vision Commissions for Education, Income and Health

1. Coordinate Community Assessment every 5 years providing information on community changes and needs
2. Convene and staff quarterly meeting of Commissions and provide research and information when requested
3. Seek and develop more robust partnerships with government, nonprofits, corporations and donors around Education, Income, and Health priorities

**B**

Identify and advance sustainable solutions to critical community needs which are aligned with UW Mission and 2020 Vision Goals; are measurable (data driven); drive resources; and provide opportunity for engagement

1. Select specific Community Impact Areas
2. Leverage current United Way work (e.g. current partner agencies, Money \$mart, Out of School Time, Summerships, Volunteer Center)
3. Expand partners to support meaningful change
4. Define strategies, establish target outcomes and report results
5. Present case for investment aligning donor and volunteers' interests with solutions and United Way "Priorities"
6. Share with other investors not already part of collaborative
7. Bring to scale to serve more people

**C**

Align allocation of resources with United Way Mission, 2020 Vision Goals and Community Impact Areas ("United Way Priorities")

1. Engage partner agencies, potentially investing in specific services addressing outcomes UW has prioritized
2. Explore methods of partnering and ways to involve, measure, fund and advocate collectively with various of organizations
3. Evaluate funded partner agencies through community volunteer process ensuring continued achievement of measurable, positive outcomes

## Increase, Mobilize and Engage Donors, Volunteers and Resources

A

Grow funds raised annually to \$3,000,000 by 2019 in support of United Way Priorities

1. Cultivate new & small business participation
2. Recruit new individual donors both in and out of workplace
3. Win back lapsed donors
4. Grow the number of Tocqueville and above (\$10K +) donors
5. Grow Leadership Giving (\$1K to \$10K) with improved and meaningful cultivation, communication, engagement and recognition
6. Initiate Bequest/Endowment Campaign

B

Develop comprehensive donor and volunteer engagement models aligned with United Way Priorities and provide quality donor and volunteer experiences

1. Develop year-round volunteer opportunities (aligned with 2020 Vision Goals for Education, Income, and Health when possible) engaging donors and prospects to volunteer
2. Deliver social impact and business value for Corporate Partners in a year-round format
3. Define Board engagement expectations and provide education and training (e.g. peer-to-peer education, donor cultivation “talking points”)

C

Align volunteer expertise and passion with United Way Priorities

1. Select a target volunteer market (e.g. 65+)
2. Partner with organizations that can assist in outreach and provide expertise on target market
3. Create meaningful volunteer activities that align with United Way priorities and offer valuable connections and fulfillment for target market
4. Invite volunteers to financially contribute to the priority to further the success of the work

D

Coordinate Disaster Community Impact Services in preparation for and response to natural disasters in the community

1. Mobilize, coordinate and train volunteers in disaster response for the Emergency Volunteer Center
2. Coordinate Community Organizations Active in Disaster (COAD) Coalition and mobilize resources as needed in response to individuals needs related to natural disasters in the community

## Cultivate & Excel in Relationships and Partnerships

**A**

Develop and implement year-round strategic Communication Plan that drives resources and promotes diverse engagement around community issues and collective solutions

1. Form a Communication/Marketing Task Force of marketing/communications professionals to elevate awareness of United Way's role in community and refresh the "brand"
2. Create promotional platform around new consistent messaging and integrate into all campaign materials
3. Develop calendar that outlines customized multi-faceted communication and involvement for donors and volunteers
4. Identify effective multi-level communication channels and media

**B**

Integrate core relationship/partnership management practices into all work and develop plan for each staff

1. Collect more in-depth data to improve prospecting and retention of donors and volunteers
2. Refine and customize meaningful experiences for donor and volunteer roles
3. Employ year-round contact plan to inform, ask, engage and thank donors and volunteers, sharing impact from investments and engagement
4. Match donor and volunteer interest with present critical needs and opportunities to invest time and financial support

## Preserve Reputation for Integrity, Fiscal Accountability & Professionalism



1. Develop staff to be “outward” focused team (e.g. educating, connecting, organizing, fundraising)
2. Increase cross-functional interaction around work plan, deliverables, accountability, and strategic achievement
3. Establish volunteer positions that supplement staff functions and provide high quality volunteer experience

1. Identify alternative revenue streams for operations and investments
2. Review and update policies as needed
3. Maintain a competitive overhead percentage relative to other not-for-profits in our community and nationwide

1. Review and report to the Board regarding status and results for all Objectives

## MISSION

To improve lives by uniting the caring power of community in Johnson and Washington Counties.

## VALUES

**C**REATE solutions to local needs through leadership, diverse partnerships and community fundraising

**A**CT in the spirit of compassion, integrity, respect, transparency and accountability

**R**ECRUIT people and organizations with passion, expertise and resources from across the community

**E**NGAGE donors and volunteers in meaningful relationships and collaborative experiences



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