



United Way of the Ozarks

Strategic Plan

2018-2023

Executive Summary

Beliefs

United Way of the Ozarks fundamental convictions, values, and character.

We believe:

- We believe everyone has worth and value, and should be treated with compassion, dignity, and respect.
- We believe in transparency, accountability, and responsible leadership.
- We believe we must be inclusive, empowering people to reach their full potential.
- We believe in systemic approaches to collaboration in the communities we serve.
- We believe we must be responsive to the changing needs of our communities.
- We believe effective fundraising, programs, and partnerships require outcomes with measurable impact.
- We believe strong communities require broad awareness, active community involvement, and commitment.

Our Mission

United Way of the Ozarks improves lives by raising funds and uniting support around our communities' critical needs and red flags.

Our Values

Accountability

Compassion

Integrity

Collaboration

Leadership

Impact

Our Vision

United Way of the Ozarks is committed to ensuring children are fully prepared to succeed in school and life and that adults are able to support themselves and their families.

We invest in programs that form a SAFETY NET for families experiencing challenges, and focus on EDUCATION to get upstream on reducing poverty. We connect communities, people, and hope.

Our Credo

United Way fights for the health, education, and financial stability of every person in every community.

Why United Way

We unite partners to solve problems that no one organization can solve alone.

Parameters

The established guidelines within which the United Way of the Ozarks will accomplish its mission.

- We will not duplicate services that address met community needs.
- We will always be good stewards by bringing value to the equation greater than overhead.
- We will always ensure that goal alignment creates a line of sight to the achievement of our annual campaign target.
- We will always make decisions with mission focus.
- We will always be evidence-based and data-driven.
- We will always invest in obtaining and retaining the best possible talent.
- We will not tolerate ineffective staff, volunteers, or board members.
- We will never tolerate discrimination or support programs that discriminate.
- We will always be accountable to our donors.
- We will embrace diversity in the programs and the people they serve.
- We will always look for innovative opportunities to engage donors and volunteers.

Objectives

The desired and measurable end results for the United Way of the Ozarks.

- 1** Raise more money by reversing the decline and hitting annual campaign targets.
- 2** Focus funded programming on proven interventions that impact community red flags as identified in the Community Focus Report, requiring specific outcome reporting.
- 3** Increase engagement annually through volunteerism by 10%.

Strategies

Bold resolutions that dedicate the United Way of the Ozarks resources and energies.

Strategy 1 – Communication

We will develop and implement plans to improve internal and external communication.

Action Plans:

1. Internal stakeholders will communicate a consistent message.
2. External audiences will understand our impact, including mission, importance to the community, and transparency regarding funding and allocations.
3. Develop and implement a crisis communication plan.
4. Define target markets and develop a marketing plan.
5. Develop a cohesive and consistent brand identity.
6. Implement a digital communications plan.

Strategy 2 – Generational Engagement

We will development and implement plans to increase generational engagement.

Action Plans:

1. Increase followers on all relevant social media platforms.
2. Increase online giving through crowdfunding & peer-to-peer sites for individual donors throughout the year and Giving Tuesday.
3. Cultivate multi-generational volunteers and donors through targeted marketing campaigns and engagement opportunities.
4. Utilize existing and emerging online tools to increase volunteer and donor engagement.
5. Improve the giving experience by updating the pledge form.

Strategy 3 – Fundraising

We will develop and implement plans to increase giving through diversifying and improving existing fundraising models.

Action Plans:

1. Increase Annual Campaign revenue year-over-year.
2. Increase revenues through a targeted major gift program.
3. Increase revenues through a targeted planned giving and endowment program.
4. Establish and enhance internal processes to ensure fundraising targets are met or exceeded.

Strategy 4 – Revenue

We will develop and implement plans to improve and diversify revenue streams.

Action Plans:

1. Increase annual revenue by seeking grant funding.
2. Increase revenue through an annual high-yield signature event.
3. Increase funding through revenue-sharing programs.
4. Increase funding for impact areas and capital projects by applying to tax credit programs.

Strategy 5 – Systems Evolution

We will develop and implement plans to improve systems across programs and agencies to address critical issues/red flags.

Action Plans:

1. Develop and implement a comprehensive Community Investment Plan.
2. Modify the Priorities Chart to reflect our approach to addressing current red flag and blue ribbon issues.
3. Develop and implement a collaborative process for continuous improvement and learning.
4. Develop and implement a formal system for funded programs to work together to systematically move individuals and families toward stability.
5. Develop and implement a Coordinated Case Management system for funded programs.
6. Implement a system for agencies to submit proposals and outcomes online.