

Strategic Vision and Goals

2018-2022

United Way
of Dane County



The power of many. Working for all.

Strategic Vision and Goals 2018-2022

Our Strategic Vision and Goals guide our results by establishing long-term direction for our annual goal setting and work planning. Our strategic planning process evaluates and builds on our successes, and determines our direction in our community's ever-changing environment. The Board uses these long-range goals as it guides the organization and approves our annual goals and budget. At each year end we evaluate results and our execution of the strategies and determine where we must place our attention in order to achieve the vision laid out in our long-range goals.

In 2000 our Board established a new vision that initiated the transformative work which created the Agenda for Change in 2003, and moved us into an impact business model.

Through 2017 we've developed strategies that have created results: Set metrics, met goals, developed partnerships, built learning communities, engaged the community, and have now set targets for community transformation in the reduction of poverty, a root cause of issues facing Dane County.

Changing more lives...

United Way of Dane County has distinguished itself nationally for adopting a community impact model and articulating bold community level goals, building strategies and achieving those goals. Thanks to the Dane County community's generosity, United Way is the single largest source of private funding for nonprofits in Dane County. We've been able to achieve remarkable results in partnership with the community and our donors, for our community, with our nonprofit partner agencies using research-based and evidence-based strategies, data-based decision-making, community-engagement, learning communities of practice, and focused-attention to the issues the community has told us are important through the Agenda for Change.

Dane County is a growing and dynamic community, but today's level of poverty demands action. This plan mobilizes the community to increase family stabilization in Dane County understanding that poverty reduction is more than a moral issue—it's a matter of smart community building, family empowerment, and workforce development—shaping and strengthening our community for the next generation.

If United Way of Dane County grows in scale with our community's growth, we will be able to respond strategically. In the next five years we'll grow our financial resources using bold, transformative approaches providing our community a return on investment to our donors and accelerating our impact work.

We aim to stabilize families in Dane County by effectively mobilizing the caring power of the community.

We'll do this with a fanatic attention on two panoptic goals

1. Deepen our results, bringing them more broadly and collaboratively to scale to stabilize families and helping them on a path to manage and accumulate assets. We'll measure family stabilization by reducing poverty in Dane County from its present level of 12.2% (64,062 of 523,643 residents, 14,875 are children).
2. Build diversified revenues of \$40 million by 2030, engaging more organizations and individuals to meet the challenge of transforming more lives.

And, we'll expand our organizational competencies in community problem solving by leading and convening community volunteers, partners, and staff.

Anna Burish

2017 Chair, United Way of Dane County Board of Directors

The Burrish Group

UBS Financial Services, Inc.

Michael Hamerlik

2017 Chair, Strategic Planning Committee

President and CEO

WPS Insurance Corporation

Renee Moe

President and CEO

United Way of Dane County

Our Mission, Vision, Equity Statement and Values give voice to our aspiration and philosophically lead the creation of this strategic plan.

Our Mission – Unite the community to achieve measurable results and change lives.

Our Vision – A Dane County where everyone can succeed in school, work, and life.

Agenda for Change *Operationalizing Our Vision*

The Agenda for Change was approved by our board in 2003 as a result of deep community engagement giving voice to the issues the community felt most strongly. It has been changed 5 times since evolving and representing the voice of the community.

Education

- Children are cared for and have fun as they become prepared for school.
- Students succeed academically and graduate from high school, prepared for higher education, career, and community.

Income

- More people are on pathways out of poverty.
- There is a decrease in family homelessness.

Health

- People's health issues are identified and treated early.
- Seniors and people with disabilities are able to stay in their homes.

United we strengthen local partnerships to achieve measurable results and change lives.

Our Equity Statement

We want to increase economic stability, and decrease racial disparities in all our work. Our Equity Statement publicly commits us to an active, transparent, and intentional approach to reducing racial disparities.

For Dane County to reach its fullest potential, we commit to engaging and involving diverse communities, especially those racially and ethnically diverse, in decision-making, leadership, and action to achieve equitable outcomes in Education, Income, and Health. We honor all our differences and create safe spaces for all voices to find common ground in building one community.

Our Values

Our Values give voice to our beliefs and behaviors and are written by and represent a collective commitment by our staff. They're the foundation upon which our work is built and executed.

Individually and collectively, we commit to:

- **Accountability:** Meet our promises of personal responsibility, commitment, and ownership of our actions, communications, and behavior.
- **Trust:** Say what we mean, mean what we say, and follow through on our commitments.
- **Respect and Compassion:** Recognize and respect our differences, assuming positive intent, while providing attentive and thoughtful customer service.
- **Leadership:** Collectively recognize and support the leadership potential of our colleagues, volunteers and ourselves.
- **Learning:** Encourage continuous personal and professional development by sharing best practices, learning from mistakes and providing and receiving ongoing coaching to meet our goals.
- **Balance:** Support one another to live a balanced life, creating the space for self-care and mindfully using our time.
- **Fun and Humor:** Take our work seriously, keep our perspective, and encourage each other to have fun, celebrate, and find the good in each day.

The power of many. Working for all.

Our “Brand Footprint” addresses our brand purpose and our Brand Personality (Honest, Optimistic, Empathetic and Inventive Partner-in-Change). Externally, we reflect this consistency and brand building work with our new tagline, released in early 2016: “The power of many. Working for all.” We often visually tell this story with an infographic depicting United Way as “the intersection where the community meets” to change lives.



As we move into this next strategic plan we will expand this sentiment further – effectively telling a connected story that links impact with revenue with engagement and measurement. For so many in the community, we are known by just one of these elements....United Way as the fundraiser, the impact driver, the volunteer clearinghouse, or the convener. Our goal is to make these multi-facets of the United Way brand front and center with the 2018-2022 strategic plan. A proactive start to this is the 2017 merger of our Community Engagement and Marketing Departments – ensuring that all brand experiences – from volunteerism, to our relationships with our partner agencies, to traditional advertising to workplace engagement – are delivering a connected and holistic message.

The truth is, United Way is the fundraiser and the impact driver and the convener and the capacity builder and the corporate engagement resource. We are all these things – and our brand must reflect that. “The power of many. Working for all.” is a good start – but it is just the beginning. From 2018-2022 expect our holistic and interconnected messaging to rise to the top – driving increased trust and engagement in United Way that ultimately will change more lives.

Engaging the community in developing our long-range goals

These long range goals emerged from a over a year of engagement activities. We engaged our Board and our key committees in deep discussions about our strategic direction beginning in early 2016. The board also participated in special field trips to our partner agencies in spring, 2017, to meet families working their way toward stability.

United Way staff called 2016 a “Year of Discovery” doing active listening and probing in the community, and devoted a full day to planning at its annual retreats in May 2016 and March 2017 and throughout the balance of the year.

Annually we engage over 7,000 people in our community to listen to what the community is saying about the issues they feel are most important to the quality of life in Dane County. We use a variety of

We’re engaging the community to focus on people’s shared aspirations, and then we get people doing actual work together through volunteerism. Community engagement moves us in a common direction, toward common ground, and offers us tremendous potential to build our community. Telling authentic stories of change—civic parables—helps us restore our faith in one another and our collective ability to build a stronger community.

--Judge Everett Mitchell, Dane County Circuit Court, and United Way Community Engagement Capacity Building Team Chair

collective voicing activities to solicit feedback, opinion, and advice on vision, strategies, metrics, and programing, and consultation on problem solving, as well as analyzing calls that come to us through United Way 2-1-1. These engagements provide valuable insight and help our Board and committees appreciate the complex nature of our convening work to problem solve with and for the community.

The Taskforce for Transformation specifically worked on a new revenue model, and its goals are represented in this strategic plan. It began work in 2016 engaging 120 volunteers; Engagements included communications with donors, CEOs and Resource Development volunteers. The board approved its reccomendations in June, 2017.

Vision Council is in a consistent cycle through its Community Solutions Teams of evaluation and community engagement through development of their Mobilization Plans and updated reports. We provided our volunteer thought leaders with research, program evaluation, and current data to indicate progress or change in our community. Mobilization Plans and their Executive Summaries are on our website. Shortened versions that aligned to 2022 goals are attached.

We engaged nonprofit leaders who are deeply involved in our strategic initiatives. They contributed valuable perspectives collectively through our Agency Executives' Meetings, in consultation with our Community Solutions Teams, in site visits, and in discussions with volunteers and staff.

The Community Impact Advisors Council, a group of diverse people with lived experiences in poverty, developed in 2016, has been key to guiding strategies and providing feedback to programming.

Community engagement and listening to our community informs all of United Way's work. It is by listening and understanding that United Way can frame community issues and responses, all to unite the community to achieve measurable results and change lives.

The Plan at a Glance

Who We Are	Mission	Unite the community to achieve measurable results and change lives.
	Vision	A Dane County where everyone can succeed in school, work, and life.
	Agenda for Change (Operationalizing our Vision)	<p>EDUCATION</p> <ul style="list-style-type: none"> • Children are cared for and have fun as they become prepared for school. • Students succeed academically and graduate from high school, prepared for higher education, career, and community. <p>INCOME</p> <ul style="list-style-type: none"> • More people are on pathways out of poverty. • There is a decrease in family homelessness. <p>HEALTH</p> <ul style="list-style-type: none"> • People’s health issues are identified and treated early. • Seniors and people with disabilities are able to stay in their homes. <p>United we strengthen local partnerships to achieve measurable results and change lives.</p>

	Goals	Strategies	Key Performance Indicators
		Overarching goal: stabilize (young) families	<ul style="list-style-type: none"> • Poverty rate and number of people, and children, by race/ethnicity • Research community health indicators
What We’ll Achieve	Deepen the scale of results of the Agenda for Change	<ul style="list-style-type: none"> • Children are cared for and have fun as they become prepared for school. <p><i>Born Learning Mobilization Plan</i></p>	<ul style="list-style-type: none"> • Number of children screened, percent of children at age-expected development • Pilot Care Coordination Model
	Reduce poverty and its antecedent metrics	<ul style="list-style-type: none"> • Students succeed academically and graduate from high school, prepared for higher education, career, and community. <p><i>Academic Success Mobilization Plan</i></p>	<ul style="list-style-type: none"> • Dane County high school graduation rate, by district and race/ethnicity • MMSD high school graduation rate, by race/ethnicity

<p>What We'll Achieve</p>	<ul style="list-style-type: none"> • More people are on pathways out of poverty. <p><i>Strong Roots Mobilization Plan</i></p>	<ul style="list-style-type: none"> • Unemployment rate, by race/ethnicity • Number of people employed through HIRE at \$15+
	<ul style="list-style-type: none"> • There is a decrease in family homelessness. <p><i>Housing in Action Mobilization Plan</i></p>	<ul style="list-style-type: none"> • Number and percent of families stabilized in Housing First as compared to number of families in shelter • Increase the supply of affordable housing
	<ul style="list-style-type: none"> • People's health issues are identified and treated early. <p><i>Health Mobilization Plan</i></p>	<ul style="list-style-type: none"> • Expand access to trauma-informed behavioral care • Reduce the disparity of <ul style="list-style-type: none"> ○ Low birth-weight babies ○ Dental care • HealthConnect enrollment compared to uninsured target population
	<ul style="list-style-type: none"> • Seniors and people with disabilities are able to stay in their homes. <p><i>Safe and Healthy Aging Mobilization Plan, and</i></p> <p><i>Youth Transitions Mobilization Plan</i></p>	<ul style="list-style-type: none"> • Number of older adults stabilized by Comprehensive Medication Reviews, SAFE Assessments, falls prevention, and supported nutrition. • High school graduation rate for students with emotional/behavioral health disabilities
	<ul style="list-style-type: none"> • Strengthen value of United Way 2-1-1 to the community; create sustainable outside investment 	<ul style="list-style-type: none"> • Number of Dane County resources in database • Revenue from outside sources • Number of uses of 2-1-1 data mining as community engagement
	<ul style="list-style-type: none"> • Develop strategic initiatives to greater results. Strengthen partnerships by building their financial and program capacity. 	<ul style="list-style-type: none"> • New and renewal grant amounts • Number and percent of signature initiatives with <ul style="list-style-type: none"> ○ Memoranda of Understanding ○ Lead Measures to manage program implementation ○ Meeting or exceeding performance goals • Leveraged investments by partner agencies

		<ul style="list-style-type: none"> Lead the community in the development and dissemination of systems improvements, best evidence/practices, and results. 	<ul style="list-style-type: none"> Number of best practice trainings, summits, symposiums, or conferences Number of Impact Reports
		<ul style="list-style-type: none"> Assist local policy makers in crafting the best possible governmental policies in alignment with the Agenda for Change and to address root causes of poverty. Build relationships with lawmakers. 	<ul style="list-style-type: none"> Board-approved position statements Number of community advocacy education efforts and resulting outcomes Response to legislative requests for research and data

	Goals	Strategies	Key Performance Indicators
How we'll succeed	<p>Overarching goal: Grow community education and diversified revenue</p>		<ul style="list-style-type: none"> Overall revenue to reach \$30 million Develop CEO involvement measurement tool
		<p>Workforce Campaign <i>Increase individual and corporate engagement and donations through new and more varied donation options</i></p> <ul style="list-style-type: none"> Implement revised corporate segmentation model that redefines how staff and volunteers execute campaigns Develop new solutions for companies choosing to hold campaigns outside of traditional timeframe Implement giving platform that provides companies/donors options to give in multiple ways and target giving Develop ability to run geographically based, time bound, cause specific campaigns Create and leverage skills based volunteerism to drive engagement within corporate partners and with UWDC Year-round engagement strategy Philanthropic/corporate engagement advisor partnering 	<ul style="list-style-type: none"> Total dollars from <ul style="list-style-type: none"> Employee Campaign Corporate Gift Combined Campaign Leadership Giving Retention of <ul style="list-style-type: none"> Workplace Campaigns Corporate Gifts Leadership Givers Donors Total number of new <ul style="list-style-type: none"> Workplace Campaigns Corporate Gifts Leadership Givers Donors Giving platform <ul style="list-style-type: none"> Total dollars/donors Incremental dollars/donors Dollars/donors by option Workplace donor participation rate Number of skill based volunteer opportunities/participation rate/outcomes/satisfaction

How we'll succeed		<p>Major Gifts, Planned Gifts, Grants and Foundation <i>Generate new and increased revenue through new cross-sector partnerships, alliances and alternative revenue streams</i></p> <ul style="list-style-type: none"> • Develop and implement major gift strategy to increase sustainable funding streams • Drive increased awareness of planned gifts; secure placement of UWDC in estate plans of major donors • Support Strategic Collaborations with optimized fundraising strategies <p><i>Expand the use of United Way of Dane County Foundation through new and expanded targeted products and services</i></p> <ul style="list-style-type: none"> • Develop new options for donors seeking endowed investments • Expand and deepen relationships with current and potential supporters of UWDC Foundation; position UWDC Foundation as philanthropic advisor to individuals, foundations and corporate partners 	<ul style="list-style-type: none"> • Total dollars/number of renewed major gifts and grants • Total dollars/number of new major gifts, grants and planned gifts • Secure transformative gift(s) • Growth in UWDC Foundation expectancies/assets to include: <ul style="list-style-type: none"> ○ Tocqueville Legacy Circle ○ Issue endowed funds ○ Geographic funds • Philanthropic Advisor
	<p>Transform revenue model</p> <p>Be donor responsive and accelerate revenue growth to transform more lives of people in Dane County facing poverty</p>	<p>Year-Round <i>Become the Dane County leader in personalized, donor-centric donor recruitment and engagement</i></p> <ul style="list-style-type: none"> • Leverage data analytics to improve capability to identify donor segmentations • Develop personalized, targeted engagement strategies based upon identified donor segments • Leverage skills based volunteerism to drive engagement • Define communications strategy that delivers engagement strategies to donors in the place and at the time they are predisposed to act • Increase revenue generating value of affinity groups 	<ul style="list-style-type: none"> • Retention of current donors • Acquisition of new donors • Number of skill based volunteer opportunities/participation rate/outcomes • Total revenue <ul style="list-style-type: none"> ○ Direct mail ○ Email ○ Social media ○ Text-to-give ○ Events

How we'll succeed	Goals	Strategies	Key Performance Indicators	
		Overarching goal: Participation and perception		<ul style="list-style-type: none"> • Increase Household Penetration • Perception, index score increase from 65.9 to >70.
	<p>Inspire everyone to engage</p> <p>Create brand experiences that engage & inspire everyone to give, advocate and volunteer</p>	<p>Broaden Awareness</p> <ul style="list-style-type: none"> • Develop and maintain United Way communication that is clear and supports our goal of educating the community • Expand our reach through increased distribution and media platforms • Increase corporate sponsorship of advertising and events • Position United Way as the “expert voice” in both traditional and social media 	<ul style="list-style-type: none"> • Increase aided awareness from 84% to >90% • Increase of sum of UWDC volunteerism, responses to community engagement, donors, and those who advocate <ul style="list-style-type: none"> ○ Increase brand attribute ratings ○ Increase media impressions ○ Increase amount raised for sponsorships ○ Increase appearances, references and quotes in media 	
	<p>Deepen Understanding</p> <ul style="list-style-type: none"> • Perfect the feedback loop through newsletters, CEO communications • Flawlessly execute meaningful events with strong calls to action • Provide consistent, meaningful engagements to drive workplace engagement and impact results • Initiate new research methodology and new success metrics to continuously improve brand experiences • Develop Dane County-specific digital engagements to raise empathy and action 	<ul style="list-style-type: none"> • Increase brand attribute ratings to >4.0 • Maintain unrestricted giving at 80%+ <ul style="list-style-type: none"> ○ Create communications calendar aligned with yearly strategy, measure through open rates ○ Increased event attendance, maintain post-event survey results over 9.0 (on a 1-10.0 scale) and increased dollars raised ○ Increased number of corporate and community engagements, measure through post-engagement survey response ○ Launch path to purchase study and other needed research and analytics ○ Launch digital engagement application by fall of 2018. 		

		<p>Strengthen Community Capacity</p> <ul style="list-style-type: none"> • Convene critical community conversations, ex. The Law Enforcement and Leaders of Color Collaboration • Bring the voice of the community into more of United Way’s work • Provide high quality and relevant nonprofit capacity building services • Perfect and expand Community Voices training 	<ul style="list-style-type: none"> • Increase “Brings people together in the community” attribute to >4.0 <ul style="list-style-type: none"> ○ Continue to foster tough conversations between partners ○ Increased role of Community Impact Advisor’s Council and Boardwalk graduates ○ Optimize number of events and ensure post-survey results increase or are maintained ○ Expand Community Voices training to volunteers and staff
		<p>Inspire advocacy and action</p> <ul style="list-style-type: none"> • Improved training of staff and volunteers on consistent use of messaging and brand • Transform current volunteer structure to align with CEM department – expand to include volunteerism focus • Ensure trainings for Loaned Executives are brand consistent and inspire flexible and effective workplace engagements • Provide high quality and inspiring materials • Increase number of donors to non-traditional community campaigns • Inspire advocacy by creating consistent on-brand communications and events for our Partner Agencies 	<ul style="list-style-type: none"> • Increase awareness of “Power of Many. Working for All” tagline to >50% of those who are aware of United Way of Dane County and campaign results <ul style="list-style-type: none"> ○ Launch a quarterly brand interaction for staff, and expand community voices training ○ Volunteer engagement survey results ○ Qualitative feedback from LEs during debrief ○ Qualitative feedback from Cabinet Leadership, Board and staff ○ Increased donors ○ Partner agency survey results

	Goals	Strategies	Key Performance Indicators and Projects
How we'll succeed	Overarching goal: Strengthen organizational results through the best use of financial management, human resources and technology		<ul style="list-style-type: none"> Evaluate financial effectiveness goal (currently 86/14 ratio + reserves) Best place to work survey results
		Become the most effective organization in changing the human condition.	<ul style="list-style-type: none"> Increase organizational impact by strengthening our talent management and inclusion efforts <ul style="list-style-type: none"> Attract Engage Collaborate Develop
	<ul style="list-style-type: none"> Improve organization performance management system to better guide managers, staff, and teams in effectiveness, communication and growth. 		<ul style="list-style-type: none"> Number of staff advancing in organization – annual measurement. Departmental succession planning developed and implemented by the end of the long range plan. Develop metrics and accountability to focus on building highly functional teams – post implementation of new performance management system.
	<ul style="list-style-type: none"> Effectively utilize the human capital assets of the organization. 		<ul style="list-style-type: none"> Annual survey- Best place to work survey. Increase by 2% engagement each year.
	<ul style="list-style-type: none"> Provide technology, web solutions and data capabilities that will enable people and process to successfully <ul style="list-style-type: none"> Engage individuals Build individual, corporate, agency relationships on a year round basis Support the Agenda for Change priorities Strengthen work place campaigns 		<ul style="list-style-type: none"> Successful implementation of the Microsoft CRM platform and 2016 Technology Committee recommendations <ul style="list-style-type: none"> 2018 Implementation 2019 Building Infrastructure 2020 CRM Integrated Shop Upgrade systems to Microsoft 365 Expand mobile technology for staff Provide innovative giving options for donors
	<ul style="list-style-type: none"> Provide analytic tools to support the organization in its decision making. 		<ul style="list-style-type: none"> Develop analytical expertise through Power BI and CRM Dashboards

		<ul style="list-style-type: none"> • Protect our data (security and quality) 	<ul style="list-style-type: none"> • Spam and virus free network • Ensure data quality is consistent across applications
		<ul style="list-style-type: none"> • Maintain an open, transparent and accountable organization through the compliance with UWW membership standards 	<ul style="list-style-type: none"> • Percent administrative cost • Compliance review and on-time report completion
		<ul style="list-style-type: none"> • Ensure financial strength of the organization by management of operating reserves 	<ul style="list-style-type: none"> • Unrestricted Reserves – Policy vs Actual • Measure impact of a change in fiscal year • ROI analysis of new initiatives
		<ul style="list-style-type: none"> • Continue to create an inviting and efficient volunteer and work place environment 	<ul style="list-style-type: none"> • Grow Building Reserve – Target \$400K • Provide a safe environment for staff and volunteers.

We believe in this plan because:

- There is no better way to create a thriving future Dane County than focusing holistically on our most vulnerable families
- The children in Parent-Child Home today, will be the workforce of tomorrow
- Through coordinated, scaled programming, we can make real change
- Fulfilling our donors’ needs through engagement, choice and personalization will lead to increased revenue
- Our fiscal responsibility will ensure it lasts

“In today’s fast-changing world, it’s difficult to create long-term goals. But, creating long-term goals is essential to defining our purpose, communicating our serious intent, and eventually, measuring our success.”

--Michael F. Hamerlik,
 President and CEO, WPS Health Solutions, and 2017 Chair,
 Strategic Planning Committee