

UNITED WAY OF CENTRAL OHIO
STRATEGIC PLAN Adopted 2013

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Dear Friend,

Thank you for your support of United Way of Central Ohio. We are pleased to share with you our new strategic plan that provides a framework to guide the organization through 2020.

Much has occurred in central Ohio since United Way last completed a comprehensive strategic planning process in 2005. The community has coalesced around the Columbus 2020 plan for economic development. For the first time central Ohio is aligned around shared goals to boost regional economic growth. Central Ohio has also been impacted by the recession that swept the nation in 2007. The Benchmarking Central Ohio reports issued by the Columbus Partnership and Columbus Foundation in 2011 and 2013 have highlighted that today poverty is a significant issue and something we must address for the long-term health of our community.

United Way's new strategic priorities were shaped with the input of hundreds of individuals who offered their insight through dozens of interviews and focus groups. We heard from United Way volunteers, funders, board and staff members, agencies and community leaders. More than 2,100 donors and volunteers shared their perspectives through an online survey. And nearly 50 of them joined us for two in-depth planning sessions that helped define how the plan can be achieved.

This document has been formulated through a deliberate process, designed in a way to ensure that we carefully weighed all of the opinions of the diverse group who participated and that we were faithfully reflecting the will of our community. Two messages were very clear and have become central priorities of the plan:

- United Way must focus its efforts on helping people build pathways out of poverty
- United Way must work closely with other organizations to develop and implement an effective community-wide plan that builds pathways out of poverty

To achieve these priorities between now and 2020 United Way will align our work to ensure every effort we fund is clearly helping build pathways out of poverty. We will improve our fundraising and engagement model to be more responsive to our investors and identify and secure new sources of funding. We will educate our community on the increase in poverty and mobilize caring people with concrete ways to help.

We believe strongly that a community-wide plan that builds pathways out of poverty must be developed that engages a broad and diverse group of partners using the collective impact approach. Collective impact happens when a core group of people or organizations come together around a shared goal with a common set of strategies and methods, with everyone bringing their strengths to the table to solve an issue that cannot be solved alone.

We look forward to the work that will be done by staff and volunteers to take this framework and implement these strategic priorities by 2020.

Sincerely,



Janet E. Jackson
President and CEO
United Way of Central Ohio



C. David Paragas
Chair, Board of Trustees
United Way of Central Ohio

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Fall, 2013

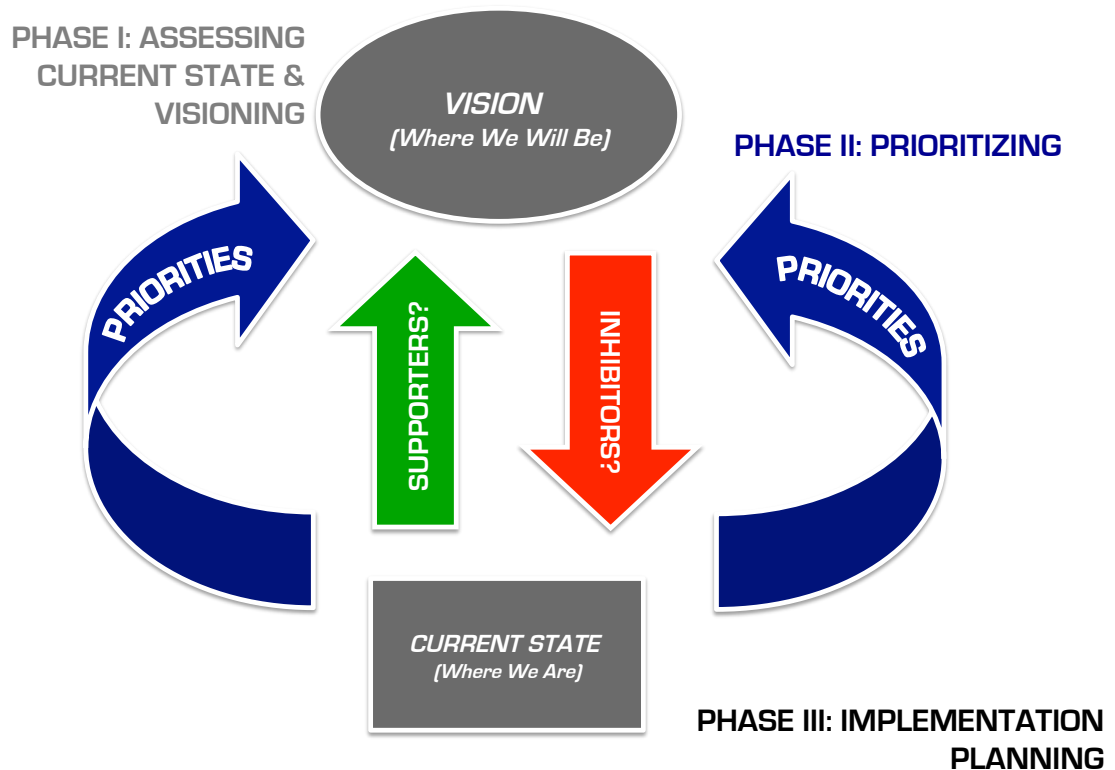
Process Summary & Objectives:

In January of 2013, United Way of Central Ohio (UWCO) embarked on a comprehensive strategic planning process with the overall objective of creating an inspiring and achievable strategic vision and plan with and for the central Ohio community it serves. The resulting strategic plan will refresh and reaffirm central Ohio's impact agenda and shared goals, and will clearly articulate UWCO's role in the realization of these shared goals.

Specific goals for the strategic planning process include:

- To develop a clear understanding of the environment in which UWCO will be operating, including external trends affecting its work
- To elicit the active engagement of organizations and individuals who participate in, contribute to and/or benefit from UWCO's work
- To describe a vision of what central Ohio would look like if UWCO and the community work together as effectively as possible
- To analyze the gap between the current state and the future vision
- To determine the strategic priorities required to close the gap between the current state and the future vision
- To align UWCO's leaders around the future vision and the strategic priorities.

Strategic Planning Process Model:



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Central Ohio 2020: Leveraging What Works
Fall, 2013

Phase I: Assessing and Visioning (January – May)

- Reviewed documents from UWCO, UWW, Community Research Partners and other relevant sources.
- Conducted 43 one-on-one interviews with UWCO senior staff, Board members, volunteers, individual, corporate and foundation donors, executives of agencies (member and non-member) and community systems, elected officials and representatives of organized labor.
- Facilitated 18 focus groups with UWCO staff, Board committees, Impact Councils, donors, agency executives and civic/faith community leaders.
- Heard from 2,116 donors, volunteers & others via online survey.
- Held a retreat with Board and senior staff on 5/10 to:
 - Review the assessment
 - Shape the strategic vision based on the input gathered from the community
 - Consider UWCO's role in achieving the vision

Questions asked during the assessment included:

1. UWCO's mission or purpose?
2. External trends that will affect UWCO's work?
3. Opportunities presented by these trends?
4. Challenges presented by these trends?
5. UWCO's strengths and assets?
6. UWCO's weaknesses and challenges?
7. Vision for central Ohio in 5 years if UWCO & the community are effective?
8. UWCO's strategic and organizational priorities to achieve this vision?

(Note: The results of the environmental/organizational assessment are detailed in the presentation made to Board and senior staff in its first retreat on 5/10.)

Phase II: Prioritizing (June)

In a second retreat on June 14, Board and senior staff:

- Reviewed a first draft of the strategic plan including a narrative summary of the environmental/organizational analysis, the vision that emerged in the 5/10 retreat, and a description of UWCO's role in achieving the vision
- Conducted a gap analysis to identify the internal and external supporters and inhibitors in the achievement of the emerging vision
- Identified four strategic priorities that will become the focus of UWCO's efforts to achieve the emerging vision as outlined in the plan narrative

Phase III: Implementation Planning (July - November)

- Update UWCO staff & community stakeholders on the strategic planning process.
- Recruit implementation planning teams to include UWCO volunteers, staff and community stakeholders.
- Develop implementation plans for each of the strategic priorities to provide guidance for the future work.

United Way of Central Ohio
Central Ohio 2020: Leveraging What Works
Fall, 2013

BACKGROUND

In 1923, the Columbus Community Fund was formed as a combined campaign to support 28 local human services agencies. In its modern form as the United Way of Central Ohio (UWCO), the organization has evolved to serve the community by bringing collective resources and solutions to the most pressing human needs.

In addition to its role as a community funder, UWCO is now engaged in advocacy, volunteerism and community capacity building, and has continued to become more focused on the goal of addressing the root causes of poverty in central Ohio, reflecting UWCO's move away from the "community chest" model to a more results oriented role that seeks to improve lives through community impact.

As an outcome of its last strategic planning process, UWCO committed to concentrating its work and investments on the achievement of nine "Bold Goals." The Bold Goals are measures of key community results in four critical impact areas that together represent the interrelated building blocks for a better life: education, income, health and home. Achievement of the Bold Goals requires a collective effort on the part of the entire community.

Though progress is evident, the work of achieving the Bold Goals is uniquely complicated and difficult. As is the case in communities all over the country, poverty in central Ohio is on the rise, presenting a persistent and growing challenge to the exciting economic development strategy and goals outlined by Columbus 2020. The fight against poverty is made more challenging by myriad and intensifying trends that create headwinds to progress:

- A complex recipe of interrelated causes is resulting in the rise and spread of poverty in central Ohio. Poverty's growth and diffusion into every suburban enclave combine to put tremendous strain on communities that are ill equipped to respond. According to Feeding America's recent "Map the Meal Gap" report, nearly 209,000 people – 18% of Franklin County's residents – were unsure where their next meal would come from. Local food pantries report that suburban hunger is one of the biggest factors behind this rising trend.
- Despite its pervasiveness and growth, poverty and its consequences are invisible to many. Physical, social and societal separations make poverty an easy problem to ignore, in spite of the enormous economic drain on the community that it creates.
- The region's diversity is rising, and is greatest among the school-age population. Immigrant populations have increased in all areas of the region, creating new challenges for school systems, the health care system and service providers.
- The educational system, viewed by many experts as the critical pathway out of poverty, is in a state of flux. State funding is changing; new standards are being implemented. The county has sixteen separate school districts, many with high student mobility. There is unprecedented focus on improving the Columbus City Schools through the recommendations of the Columbus Education Commission, a partnership between government, business and the human services sector. Yet despite growing recognition that *all* children must come to school prepared to learn if our region is to succeed long term, a unified solution remains elusive.
- Despite enjoying the second highest ratio of college students per capita in the country, central Ohio is seeing an increasing proportion of low-wage jobs, making it difficult for many to earn a living wage and affecting our ability to retain the workforce we're educating.
- An aging infrastructure does not adequately support the needs of our current population or an increasingly interconnected region, particularly with respect to both transportation and safe and affordable housing.

United Way of Central Ohio
Central Ohio 2020: Leveraging What Works
Fall, 2013

- There is pressure on the nonprofit community to increase services in response to mounting needs, while resources diminish due to cuts in funding, shifts in funder strategies and intensifying competition as nonprofits proliferate. In response, both funders and agencies are seeking ways to streamline the nonprofit sector to drive greater efficiency, capacity and accountability through mechanisms such as shared services and consolidation. Calls intensify for collaboration among the government, business and nonprofit sectors to address systemic problems, requiring better regional planning and goal setting.
- Philanthropy is changing dramatically. Donors seek alignment with their own values and philanthropic giving goals rather than their employers', and want greater personal engagement. More donors are using technology tools to connect directly, want to be actively engaged beyond their financial support, want to see measurable impact from their gifts (often in the short term), and want greater choice and control over their philanthropic decisions. Also, fewer major employers are headquartered here, or are more often led by executives without established ties to this community. Some employers are moving toward open campaigns that encourage philanthropy without championing a specific mechanism or partner, while others are pursuing philanthropic strategies that do not include federated campaigns.

A VISION FOR CENTRAL OHIO

UWCO exists as an organization to bring together and harness the collective energy, imagination, commitment and resources of the community for its collective benefit, and envisions a central Ohio community in 2020 that is a healthy and thriving place for all of its residents to live, learn, work and raise a family. UWCO envisions a central Ohio in which the community acts collectively to achieve these goals:

- The regional community comes together and takes ownership of creating pathways out of poverty. There is a clear, shared understanding of the impact of poverty's collective drag on our region's ability to reach its full economic potential. Our region understands the moral and economic imperative to provide people with pathways out of poverty, and that everyone gains when many more people are prepared to contribute to and participate in our shared success.
- The regional community understands the critical issues that contribute to poverty, and is aligned around a shared poverty agenda and collaborative, systemic solutions, just as it is aligned around the shared economic development agenda outlined by Columbus 2020. The shared poverty agenda and plan establish goals for addressing the root causes of poverty, and identify key economic and quality of life indicators to measure the community's progress.
- The community as a whole embraces and leverages its rich diversity in achieving its goals. People across the region understand the power in central Ohio's diversity and are developing the cultural awareness and competencies to work together effectively to provide pathways out of poverty for the most vulnerable among us.
- There is effective collaboration across the business, government and nonprofit sectors to achieve a shared poverty agenda. There are clear, shared goals to align stakeholder efforts to combat the root causes of poverty. Public and private funding is leveraged to deliver collective impact. The service provider network is rational, efficient and focused on making substantial progress toward clear, measurable and shared goals, with well-defined roles and accountabilities.
- Through the collective efforts of the regional community, *all children* come to school prepared and able to learn. The recommendations of the Columbus Education Commission are fully implemented, and similar outcomes are being achieved in all central Ohio school districts.

United Way of Central Ohio
Central Ohio 2020: Leveraging What Works
Fall, 2013

- The region is experiencing significant improvement in economic and quality of life indicators such as those described by UWCO's community results indicators in the four impact areas of education, income, health and home.

COLLECTIVE IMPACT

As the planning process and vision for Central Ohio in 2020 emerged, the concept of collective impact was embraced as a way for our community to engage more deeply on the issue of poverty and enhance our progress in addressing this significant issue.

Collective Impact is defined as "long-term commitments by a group of important actors from different sectors to a common agenda for solving a specific social problem. Their actions are supported by a shared measurement system, mutually reinforcing activities, and ongoing communication, and are staffed by an independent backbone organization." [Stanford Social Innovation Review, Collective Impact]

Backbone organizations have been identified as key to the success of collective impact work. Key roles for backbone organizations include guiding vision and strategy, supporting aligned activities, establishing shared measurement, building public will, advancing policy, and mobilizing funding. [Stanford Social Innovation Review, Understanding the Value of Backbone Organizations in Collective Impact]

UWCO's ROLE IN ACHIEVING THE VISION

Collective impact on Central Ohio's poverty issue will require leadership, participation, and alignment by many organizations and individuals. Building on its legacy of helping bring the central Ohio community together to create change, UWCO will align its efforts to maximize central Ohio's collective impact on poverty by:

- **Resourcing.** UWCO will continue to play a critical role in providing critical resources – human, financial and other – to address the collective needs of the community, and in helping to create a regional culture of collective philanthropy. Building on its considerable capabilities and relationships, UWCO will develop new ways of building support and engaging people in collective philanthropy for the benefit of the community, and will diversify its sources of funds by capitalizing on grants and other revenue-generating opportunities.
- **Educating.** UWCO will use the power of its research, expertise, relationships and voice to educate the regional community on the causes and impact of poverty in our community and the need for and great benefits of regional collaboration and planning to develop collective solutions.
- **Convening.** UWCO will convene and engage those who must participate in the development and realization of a shared poverty agenda and plan in ways that lead to sustainable collective impact.
- **Influencing.** UWCO will direct its resources and utilize advocacy and volunteerism to influence the direction of outside resources to align around a shared poverty agenda and plan, recognizing that its own funding can make the greatest impact when leveraged with other public and private funds. Through strengthened partnerships across the public, private and nonprofit sectors, it will influence the allocation of resources –

United Way of Central Ohio
Central Ohio 2020: Leveraging What Works
Fall, 2013

financial resources, member agency resources, systemic resources and volunteer resources – toward the areas of greatest collective impact.

- **Accountability.** UWCO will engage in and is willing to lead the development of a set of shared community measures that assess progress on the community’s shared poverty agenda and plan and will support a process that ensures all participants in the system understand their roles and hold themselves and others accountable for measurable progress.
- **Building Capacity.** UWCO will serve as a key partner for building the capacity and accountability of those organizations engaged in driving collective impact on poverty, including but not limited to the agencies it funds directly. Through its own efforts and in partnership with other funders, it will be a resource for best practices through educational offerings and toolkit development, and will facilitate the effectiveness and efficiency of those engaged in driving collective impact on poverty by exploring opportunities for shared services and collaboration. UWCO will also invest in enhancing its own internal capacity to work most effectively in these areas.

MAKING THE TRANSITION

UWCO has been on this path for several years, and brings significant capabilities and assets that would support Central Ohio’s collective impact on poverty, and could position it to serve in the role of community backbone organization if appropriate. These capabilities and assets include:

- **Significant success in relationship development and fundraising across the community.** UWCO has deep relationships with and support from leaders in the public, private and nonprofit sectors. This fundraising expertise gives the necessary voice and credibility to be a powerful partner in any collective impact work in central Ohio.
- **Knowledge and expertise about issues and best practices.** UWCO is a respected source of information in the community and a national leader within the UWW network, known for thought leadership and for actively seeking out and engaging in practices that produce results.
- **Ability to convene and influence.** Whether as a leader or participant in collective impact initiatives, UWCO is a credible community partner and a valued participant in conversations regarding community issues.
- **Leading the way on accountability.** As UWCO focused its resources on the four impact areas of education, income, health and home over the last few years, it has been a leader in fostering accountability for measurable outcomes and increased effectiveness across its member agencies.

At the same time, significant challenges exist that must be addressed in order for UWCO to support the maximization of the community’s collective impact on poverty, including:

- **The scope and complexity of the poverty problem.** Poverty can seem unsolvable; its causes and effects are interconnected, complex and not well understood. Each sector of the community only understands poverty

United Way of Central Ohio
Central Ohio 2020: Leveraging What Works
Fall, 2013

from the perspective of its own experience, and it is invisible to many although efforts to create a greater shared understanding of the issue are underway.

- **Common misperceptions about UWCO's role and impact goals.** While UWCO has made significant strides in positioning itself as convener/influencer/educator focused on the root causes of poverty, it is still seen primarily as a fundraiser focused on workplace campaigning by many.
- **The broad scope of community expectations.** Although UWCO has evolved from its "community chest" role, the impact areas of education, income, health and home are still broad enough that decisions around funding, priorities and resource allocation are challenging. UWCO faces high expectations from the community as a whole and the nonprofit sector in particular to fund a very broad range of services.
- **The ability to effect real and sustainable change with existing fundraising.** UWCO's annual campaign achievements are venerable within its peer communities. Yet as a proportion of both agency budgets and of total human services funding invested in central Ohio each year, UWCO funding represents a small percentage. Rising donor designations outside of UWCO's core mission reduce the dollars available to support the work of providing pathways out of poverty in central Ohio. To create real and sustainable change, leveraging more than UWCO's annual allocations is essential.
- **The changing nature of the donor base.** As outlined in the Background section, the potential donor base is changing dramatically. Who they are, where and how to reach them, what they care about – all of these variables are in a state of radical change, and may be at odds with the finely-honed corporate workplace campaign model that has served UWCO and the community for so many years.
- **UWCO's organizational capacity.** As UWCO has evolved and grown into a role far beyond just raising and allocating funds, it has outgrown its organizational structure and strained its capacity. Influencing, convening and capacity building – roles which are critically important to UWCO's and the community's success – do not fit easily into a "percentage overhead of fundraising" model. New organizational capacity, skills and competencies will likely be required to adequately fulfill these roles.

United Way of Central Ohio
Central Ohio 2020: Leveraging What Works
Fall, 2013

UWCO'S STRATEGIC PRIORITIES

In light of the vision for central Ohio that emerged with broad community input, and of the role UWCO can play in its achievement, UWCO must focus its resources and attention between now and 2020 on four key strategic priorities that will leverage its organizational impact.

These strategic priorities provide a framework to guide the work UWCO must accomplish to collaborate effectively and be poised to support collective impact efforts in our community in the most appropriate manner.

TO SUPPORT THE MAXIMIZATION OF CENTRAL OHIO'S COLLECTIVE IMPACT ON POVERTY, UWCO WILL:

1. ALIGN OUR WORK TO PROVIDE PATHWAYS OUT OF POVERTY

Outcomes UWCO will achieve for this priority by 2020:

- We understand the root causes and culture of poverty to which our work will be aligned.
- All funding and work efforts are clearly aligned with building pathways out of poverty, and are shown to be effective based on outcomes data.
- We are engaged in the most appropriate way in community collaborations and collective impact activities (convener; catalyst; leader; collaborator; advocate) regarding pathways out of poverty.
- A coordinated community strategy and plan to address poverty is developed and implemented.

When these outcomes are achieved, we will be:

- Prioritizing work, resources and funding/allocations to ensure that all energy is squarely focused on understanding and effectively addressing the root causes of poverty
- Convening, collaborating and participating with key partners across the public sector (government, education), private sector and nonprofit sector to leverage community resources and maximize our collective impact on poverty
- Supporting effective alignment of key influencers to collectively address the causes and effects of poverty
- Participating in community priority setting around the community's shared poverty agenda
- Recognizing the singular importance of education as a factor that can lift an individual out of poverty. Supporting education efforts from kindergarten readiness through preparation for sustainable-wage employment will be a key area of focus

2. MODERNIZE THE RESOURCE DEVELOPMENT/ENGAGEMENT MODEL AND INFRASTRUCTURE

Outcomes UWCO will achieve for this priority by 2020:

- Based on the new coordinated community collective impact strategy, our new resource development model reflects the comprehensive and long-term nature of the work, aligns with contemporary investor needs, patterns and behaviors, and advances a collective impact movement in central Ohio to create pathways out of poverty.
- Our new volunteer engagement model is aligned with contemporary volunteer needs, patterns and behaviors, and advances a collective impact movement in central Ohio to create pathways out of poverty.

United Way of Central Ohio
Central Ohio 2020: Leveraging What Works
Fall, 2013

- More funding outside of UWCO’s management is leveraged and directed to create effective pathways out of poverty in central Ohio
- Together with our partners in the movement to create pathways out of poverty, we are identifying, securing, and measuring the effectiveness of new sources of funding, including new models not previously identified/utilized.
- There is a network of influencers across the community engaging people in and connecting them to the collective impact movement in central Ohio working to create pathways out of poverty.
- We have the tools and resources to support achievement of these outcomes.

When these outcomes are achieved, we will be:

- Expanding the number and range of investors and volunteers beyond those cultivated through traditional corporate workplace campaigns by aligning with their needs, patterns and behaviors
- Offering new ways and places to engage in and connect to the collective work of supporting pathways out of poverty in alignment with a coordinated community collective impact strategy
- Collaborating with partners to leverage more funds outside of UWCO’s management, and identifying new and innovative sources of funding to create pathways out of poverty
- Using the power of community networks to influence investors and volunteers to join the collective impact movement working to create pathways out of poverty
- Exploiting technology to foster engagement and support from new and existing investors and volunteers

3. MAKE THE CASE EFFECTIVELY THROUGH COMMUNICATION AND EDUCATION

Outcomes UWCO will achieve for this priority by 2020:

- Poverty is defined and its impact is easily understood such that the community believes that it can and must be addressed
- Our marketing and communications strategy, messages and infrastructure are highly effective at driving people to act individually and collectively to address poverty by giving, advocating and volunteering.
- Donors, advocates and volunteers who engage with UWCO understand the clear and measurable impact of their efforts.
- UWCO’s role is recognized by the general public and by business/civic leaders in the community-wide effort to reduce poverty including as an expert, an activist and a potential backbone organization.

When these outcomes are achieved, we will be:

- Formulating communication and education strategies that ensure a clear understanding of the scope, scale and impact of poverty in central Ohio
- Developing new and more effective methods that compel a broader cross-section of the community to participate and invest in the collective work of creating pathways out of poverty
- Demonstrating the clear and measurable impact of investors’ and volunteers’ efforts on the community’s poverty issue
- Continually adapting and refining messages for clarity and simplicity based on active engagement with multiple community sectors
- Clearly articulating UWCO’s role to support the proposed community-wide effort to create pathways out of poverty

United Way of Central Ohio
Central Ohio 2020: Leveraging What Works
Fall, 2013

4. ADAPT UWCO ROLE AND ORGANIZATION STRUCTURE, AND EXPAND CAPACITY

Outcomes UWCO will achieve for this priority by 2020:

- We are aligned in our understanding among staff, Board and volunteers around our role in collective impact, including as a possible backbone organization.
- We will have a structure that reflects, support and drives our evolving role and mission in collective impact including as a possible backbone organization, with staff, Board and volunteer roles and responsibilities.
- Our public policy/advocacy/community mobilization role is clarified and embedded across the organization and community, and we are seen by local, county and state government leaders as go-to resource for subject matter expertise (advocacy/public policy).
- We demonstrate a culture that reflects a connection and commitment to the cause and redefined role, as well as cross-functional and diverse staff and volunteer engagement, both internally and externally.
- We have a high-performance, high potential and high-impact workforce that is achieving its strategic, organizational and individual performance goals.

When these outcomes are achieved, we will be:

- Clearly defining and communicating the evolving role(s) that UWCO will play, potentially as a backbone organization, to support the community's collective impact on poverty
- Creating and sustaining an organizational structure and culture that allow UWCO to support its evolving roles to support collective impact efforts focused on creating pathways out of poverty, and that is embedded across Board, staff and volunteers
- Clarifying and resourcing UWCO's public policy/advocacy/community mobilization role in supporting the community's collective impact on poverty
- Developing a high-performance, high-potential and high-impact workforce to support the work.