Strategic Plan
2017-2022

United Way of Northeast Mississippi
**Mission:**

To create opportunities to improve people’s lives in the communities we serve.

**Vision:**

United Way is a catalyst for philanthropic growth and impact for Northeast Mississippi.
Strategic Imperatives

- Refresh Our Value Proposition and Brand
- Develop Enhanced Resource Development Efforts
- Refine Allocations Process for Future Relevance
- Explore Community-Level Focus
# Theory of Change

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Refresh Our Value Proposition and Brand

- Connect the dots between gift and impact
- Make Hyper Local
- Drive Millennial Engagement
Connect the dots between gift and impact

- Shift our branding language to benefits in addition to features
- Tie corporate gifts to CSR by offering focus areas
- Phase in a program-level, outcome-based funding model

Connect the UW brand to specific programs within agencies
Features

• Meet multiple needs with one gift
• Foundational support for some programs and supplemental for others
• Team of peers ensuring sound stewardship
• Keeps philanthropy local
• Reduce fundraising competition
• Directly impacts 125K people

Benefits

• Your gift is helping move an important community needle.
• The impact of your gift is reducing the need for intervention.
• Long-term change vs. short-term charity
• Identifying the most critical needs
• Collective Impact
• Measured impact/ROI
Make Hyper Local

Develop a targeted communications plan that includes:

- Website subsections
- Media releases with county-level stories
- Include more county specific information in campaign materials
Drive Millennial Engagement

Establish Young Leaders Affinity Group

- Develop targeted outreach plan for Millennials
- Leverage YL group for future UW leadership
- Establish “cause” opportunity for engagement
- Identify and implement technology and engagement tools
Year 1—Refresh Our Value Proposition and Brand

- Assess current CSR landscape (Russ/Mike)
  Website reviews/research (Q1-Q2)
  Add to CEO call meetings (Q1-Q2)

- Develop comprehensive marketing and communications plan (Robin)
  Strategy session with Hillary (Q1)
  Assess current approach/tools (Q1)
  ID UWW resources (Q1)
  Assess vehicles for communication (Q2)

- Young Leaders (Robin/Melinda)
  Connect with UWW for support (Q2-Q3)
  Develop inventory of current relationship connections with Millennials (Q2-Q3)
  ID a leading “champion” to help establish a formalized group (Q1-Q3)
  Develop preliminary design of the group’s purpose, function, and structure (Q3-Q4)
Develop Enhanced Resource Development Efforts

**Short-term Strategies**
- Workplace Campaign Growth
  - New Campaign Accounts
  - Maximize potential of existing accounts
  - Conduct CAN-DO

**Non-workplace Individual Giving**

**Long-term Strategies**
- Grants
- Planned Gifts
Year 1—Develop Enhanced Resource Development Efforts

- Non-workplace individual giving (Robin/Cara)
  - Implement Mobile Cause (Q1-Q2)
  - Use direct mail to target individuals who previously gave through workplace (Q1-Q2)
  - Advertise vehicles for non-workplace giving (Q-all)

- Workplace campaign growth (Melinda)
  - Conduct CAN-DO (Q1-Q2)

- Leadership and Major Gifts (Russ)
  - Conduct Major Gifts Ramp-Up Program (Q3-Q4)
Refine Allocations Process for Future Relevance

More Comprehensive Training/Education
- Staff
- Agencies
- Board
- FD Volunteers

Apply focus to our Investments
- Issue Areas
  - Health
  - Financial Security
  - Education
  - Basic Needs

Program Funding
- Outcomes

Explore Best Practices in Investment Models
- Focus Area Expertise
- Program Review Methods
- Decision Making Criteria, etc.
Year 1 - Refine Allocations Process for Future Relevance

- Categorize current agency investments (E.FS.H, BN), and conduct initial analysis on investment proportions (Shelia) (Q1)

- Include a discovery component in allocations process/application to start identifying “program” level use of funds (Shelia) (Q2)

- Introduction to Outcome Measurement Training (Melinda) (Q1-Q2)
Explore Community-Level Focus

- Explore expanded role in leading community-level work
  - Identify community needs
  - Establish flagship initiative(s)
- Participate in Community-Level Conversations
  - Increase presence at the diverse community “tables”
  - Increase our exposure to and education on top community issues
Year 1—Explore Community-Level Focus

- Leverage our board to expand our relationships and presence in all 7 counties. (Melinda) Conduct board relationship and influence assessment (Q3)

- Meet with CREATE/Commission on Future of North MS to discuss their scope and scale and how UW can play a meaningful role (Q1)