

# Strategic Plan 2017-2022



# 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

## Current



- Donors
- Charity
- Fundraising Lens
- Funders
- Agency Lens
- Output Focus
- Selling Features
- Organizational Lens
- Assumptions

## Enhanced



- Investors
- Charity + Change
- Leadership Lens
- Investment Vehicle
- Program Lens
- Outcome Focus
- Selling Benefits
- Community Lens
- Data-Based Decisions

# Refresh Our Value Proposition and Brand

```
graph TD; A[Refresh Our Value Proposition and Brand] --- B[Connect the dots between gift and impact]; A --- C[Make Hyper Local]; A --- D[Drive Millennial Engagement]
```

Connect the  
dots between  
gift and impact

Make Hyper  
Local

Drive Millennial  
Engagement

# Connect the dots between gift and impact

```
graph TD; A[Connect the dots between gift and impact] --- B[Shift our branding language to benefits in addition to features]; A --- C[Tie corporate gifts to CSR by offering focus areas]; A --- D[Phase in a program-level, outcome-based funding model]; D --- E[Connect the UW brand to specific programs within agencies];
```

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 + Benefits



## 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)
  - Asses 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)

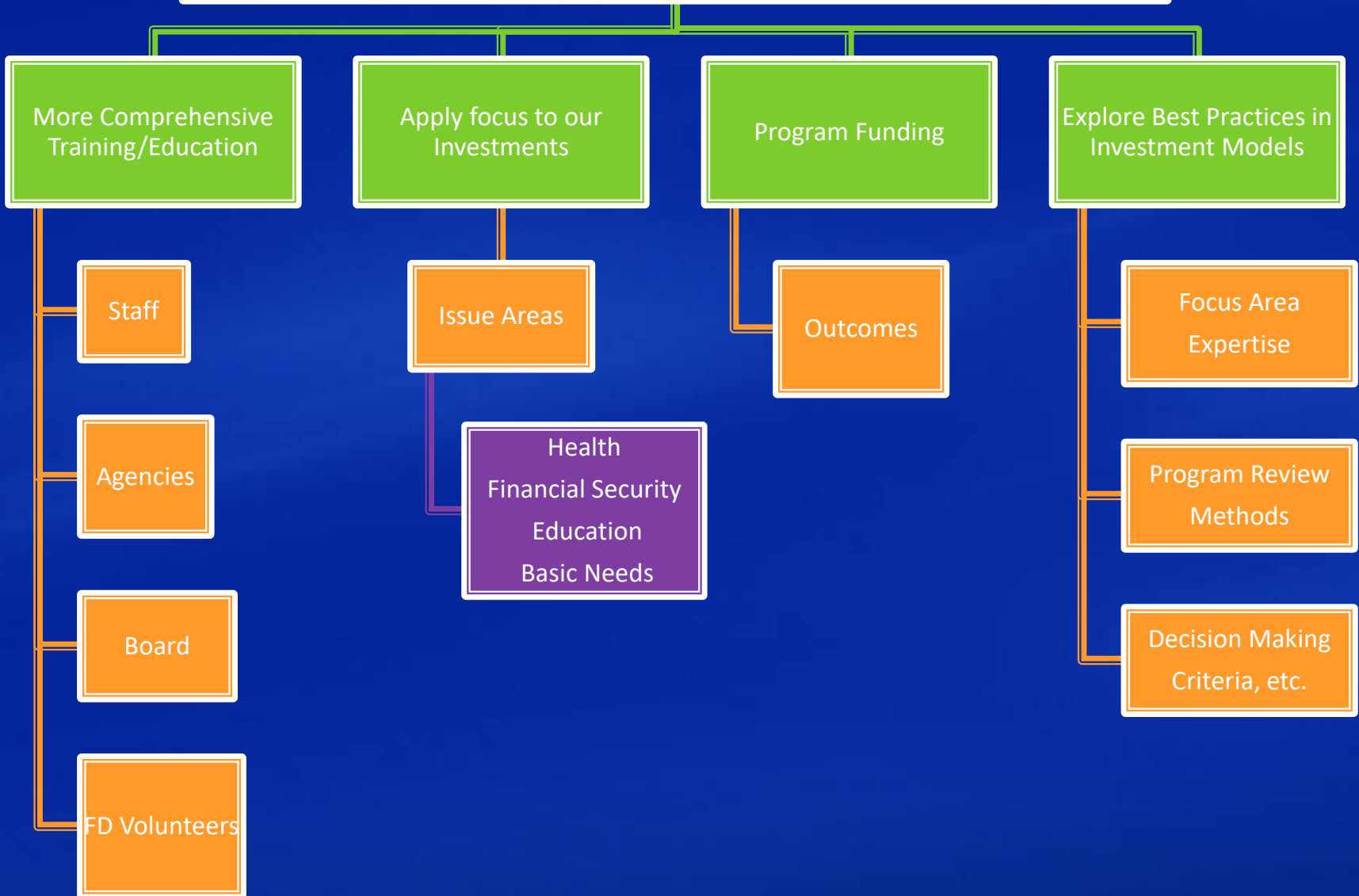
# Develop Enhanced Resource Development Efforts



# 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



# 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



# 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)