



United Way
of Southeast Mississippi

Strategic Plan 2016-2020



GIVE. ADVOCATE. VOLUNTEER.
LIVE UNITED®

Approved by majority vote of the board of directors, August 24 ,2016.

Our Vision: United Way of Southeast Mississippi will be the catalyst for change, transforming the quality of life in our community.



Our Mission: Cultivate partnerships in our community to improve lives through education, financial stability and healthy living.

LETTER FROM CEO

Dear Friends,

I am excited to present to you the United Way of Southeast Mississippi's 2016-2020 Strategic Plan. As the new President/CEO, the strategic planning process has been quite a learning experience. I am thankful for the members of the strategic planning committee, who spent many hours determining our organizational strengths and weaknesses, helping assess the community we serve and identifying initiatives to make life better for our friends and neighbors, now and in the future.

This process was important because it gave us the opportunity to carefully and thoughtfully chart our course for the next four years. As we evaluated the changing landscape of our community, we recognized a need to change the way we do business in order to grow revenue, increase our impact and maintain relevance locally. We know that technology has changed the way people invest their charitable dollars and any philanthropic organization without a smart digital platform will be left behind. We also know that motivations for giving between the millennial generation and older generations are different, so the techniques for engaging the younger generation must change as well.

This strategic plan will serve as a roadmap to guide us forward. Goals and operational plans will be developed and evaluated on an annual basis.

We won't be able to accomplish these goals without the support of a strong group of leaders represented by our board of directors, various committees and all those who volunteer to serve with United Way. We hope that you will find a way to GIVE, ADVOCATE and VOLUNTEER with us to create a greater impact in our community.

Sincerely,

Tracie Fowler
President/CEO
United Way of Southeast Mississippi

COMMITMENT TO COMMUNITY



- To have a deep understanding of community needs and to address those needs using programming that creates lasting positive change
- To steward donor investments and grants in an effective, efficient and transparent manner
- To work collaboratively with public and private entities, and community organizations
 - To report regularly to the community

GIVE. ADVOCATE. VOLUNTEER.

CORE VALUES



Integrity: Be honest in everything we do.

Accountability: Be effective, efficient, and transparent by regularly reporting results to community.

Collaboration: Be fully engaged with our community and committed to community-wide success.

Volunteerism: Mobilize residents to be meaningfully connected with our community.

Innovation: Create and support dynamic solutions to community challenges.

Diversity: Embrace and leverage the different points of view that diverse populations offer.

PROCESS SUMMARY



Strategic Planning Committee:

Billy Browning, Susan Yarrow, Shawn Harris, Carlos Brown, Greg Hodges, Marcia Line, Susan Slaughter and David Arnold.

Strategic Planning meetings were held:

Thursday, March 17, 2016

Thursday, March 31, 2016

Thursday, April 14, 2016

Thursday, April 21, 2016

Thursday, May 12, 2016

Our strategic planning process began with a review of the UWSEMS 2005-2010 Strategic Plan and a SWOT analysis that was prepared in January 2014. The strategic planning committee determined that some adjustments to the SWOT analysis were needed. The United Way Worldwide Enterprise Wide Strategic Plan, as well as, strategic plans from five other United Way organizations of various sizes that are fully engaged in the community impact funding model were also reviewed.

The committee used information from five community conversations facilitated by Dr. Laura Richards, Assistant Professor of Social Work at The University of Southern Mississippi, as well as local and statewide research to identify four strategic objectives designed to transform United Way of Southeast Mississippi from a fundraising organization into a collaborative organization that mobilizes businesses, community leaders, not-for-profit organizations, government agencies and communities to expand opportunities for people to succeed.

WHERE WE ARE



Strengths

1. History of fiscal responsibility
2. Respectable reputation
3. Strong diverse board
4. Meticulous funds distribution process
5. Support of local business community

Weaknesses

1. Lack of community fundraising plan beyond traditional campaign
2. Insufficient funds to meet community needs
3. Lack of long-term strategic communication plan
4. Future leadership recruitment
5. Employee turnover/development

Opportunities

1. Expand communications and giving through mobile technologies
2. Develop deeper relationships with individual donors
3. Engage millennial generation with more volunteer opportunities
4. Expand reach to other non-profits
5. Stories, stories and more stories- about people assisted, community partners, donors, volunteers

Threats

1. Large companies running their campaign using web-based technology
2. Decrease in undesignated dollars
3. Losing ground to non-profits with more of a “wow” factor
4. National and local economic conditions
5. Lack of awareness in younger population

STRATEGIC OBJECTIVES



Objective 1

Achieve Community Impact

- Improve lives and make measureable change in community conditions on specific target issues in the areas of Education, Financial Stability, Health and Support Services.

Objective 2

Develop Resources

- Grow, diversify and sustain long-term funding, increase engagement and strengthen donor relationships to support United Way's organizational objectives.

Objective 3

Build Community Awareness and Understanding

- Engage the community in United Way's work by strengthening the brand through effective communication.

Objective 4

Achieve Operational Excellence

- Enhance and incorporate on-going strategies to support community impact objectives, maintain reputation for accountability and efficiency, and ensure leadership development.

COMMUNITY IMPACT PLAN

EDUCATION

Goal: Help children and youth achieve their potential.

Target Issues

- **Kindergarten readiness**-encourage early literacy development, build kindergarten readiness skills and work to make sure every child enters school ready to learn
- **Grade appropriate reading levels**-increase the number of children from low-income families reading proficiently by the end of third grade
- **Graduation rate**-help ensure that more students stay on track to graduate high school

FINANCIAL STABILITY

Goal: Promote financial stability and independence for families and individuals.

Target Issues

- **Financial literacy**- support financial literacy programs that educate individuals of the importance of obtaining and maintaining assets
- **Job training and readiness**-help low-wage, under-skilled workers prepare for self-sustaining jobs
- **Affordable housing**-help provide safe and affordable housing to low-income families

COMMUNITY IMPACT PLAN

HEALTH

Goal: Educate community members of the importance of good health and make them aware of basic health and human services.

Target Issues

- Access to healthcare**—provide quality care to those lacking access to sufficient coverage
- Prevention, management, and treatment**—help individuals achieve optimal physical, mental, developmental, emotional, and social health
- Safe and independent living**—help aging clients and those with medical issues maintain safe, independent living or improve their quality of life

SUPPORT SERVICES

Goal: Support most basic needs of food, shelter and safety to individuals and families.

Target Issues

- Supplemental nutrition and feeding**—make nutritious food available to support the health and well-being of the chronic hungry
- Disaster preparedness/relief**—coordinate with disaster relief organizations and local emergency planners to develop recovery plans and assist in provide unmet needs
- Shelter for individuals and families experiencing domestic violence** – provide safe housing and basic needs for victims of domestic violence
- Homeless prevention services** - assist children and families who are homeless or at risk of becoming homeless

OBJECTIVES at-a-glance

Objective 1

Achieve Community Impact

Improve lives and make measureable change in community conditions in specific target issues in the areas of Education, Financial Stability, Health and Support Services.

Initiatives:

1. Continue developing community impact plan
2. Develop action plans and outcomes to address the identified community needs
3. Revise and expand funds allocation to include an RFP process that aligns with target issues in education, financial stability, health and support services
4. Create and coordinate coalitions that support and impact long term change in our community

Responsible parties: UWSEMS staff, community impact committee, board of directors

OBJECTIVES at-a-glance



Objective 2

Develop Resources

Grow, diversify and sustain long-term funding, increase engagement and strengthen donor relationships to support United Way's organizational objectives.

Initiatives:

1. Generate a net 2% increase in each of the next 3 years (a 6% increase total) in dollars fundraised through the traditional annual workplace campaigns
2. Package community impact efforts into valuable donor, sponsorship and grant opportunities
3. Grow revenue beyond the traditional campaign
4. Research and implement online pledge capabilities

Responsible parties: UWSEMS CEO and resource development director, resource development committee, board of directors

OBJECTIVES at-a-glance

Objective 3

Build Community Awareness and Understanding

Engage the community in United Way's work by strengthening the brand through effective communication.

Initiatives:

1. Create an annual, targeted communications plan designed to achieve awareness and understanding of the United Way vision, mission and initiatives
2. Strengthen United Way's position as a community impact leader and convener achieving results in education, financial stability and health through targeted communication and advocacy
3. Inform and engage constituents through year-round, targeted, relevant messaging

Responsible parties: UWSEMS CEO, marketing and communication director, communication committee, board of directors

OBJECTIVES at-a-glance



Objective 4

Achieve Operational Excellence

Enhance and incorporate on going strategies to support community impact objectives, maintain reputation for accountability and efficiency, and ensure leadership development.

Initiatives:

1. Ensure diverse representation of community population on board, committees and within volunteers and staff
2. Actively educate and engage board members in the work of the organization
3. Invest in staff training and development
4. Continue to provide complete transparency of United Way's operation

Responsible parties: UWSEMS CEO, staff and board of directors



**United Way
of Southeast Mississippi**

CLOSING THOUGHTS

After 75 years of service to our communities, United Way is among the most trusted and respected charitable organizations in Southeast Mississippi. We have been entrusted with both the opportunity and the responsibility to provide the communities we serve with the leadership necessary to change lives and improve community conditions.

Our work begins with a clear and unified understanding that our mission is to advance the common good by uniting volunteers, donors and community partners to improve the quality of life in Forrest, Lamar, Marion and Perry counties.

We are confident that our vision, mission, core values and strategic direction will help us remain focused and diligent in addressing the most pressing and challenging needs in our communities.

While this document sets our direction for the next four years, we will monitor progress and results annually, making the necessary adjustments to remain on track to meet our strategic community goals.

GIVE. ADVOCATE. VOLUNTEER.