

**United Way  
of Washtenaw County**



***Strategic Planning  
Executive Summary  
FY2018 - FY2021***

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**Introduction and background**

Building on our 98-year history, the United Way of Washtenaw County (UWWC) serves a county of 358,000, and focuses specifically on issues related to poverty and inequity. With a 14% poverty rate and an additional 23% of the population struggling to meet their basic needs (ALICE report, 2017); poverty and inequity continue to systemically marginalize some of our neighborhoods. Washtenaw County ranked in the bottom 8% for upward income mobility in Harvard’s “Equality of Opportunity Study”, a measure of the chance for a child from a lower-income household to rise into the middle class and beyond. This illustrates how upward mobility is increasingly determined by neighborhood and zip code. Ann Arbor also ranked as the 8<sup>th</sup> most economically segregated community in the nation, worse than New York and LA. (Martin Prosperity Institute study, 2015)

United Way of Washtenaw County invests in solutions that improve lives. Our 2018-2021 Strategic plan recognizes equity as the foundation of our work. We apply an equity lens to our focus areas to ensure that we are intentional and successful in addressing the needs of our community, and have made a long term commitment to systems change beyond this three year plan. We invite you to participate and work with us on the strategies and actions described within this plan, as the power of the United Way lies within all of us. Each person in our community who is willing to lend a hand and volunteer amplifies our impact through aligned and collective action.

### **Vision**

We envision an equitable community where opportunity is not limited and every member reaches their full potential. By the year 2030 we aspire to live in a community where:

- Your zip code no longer determines your opportunity in life
- Life expectancy is the same across all populations and communities in our County
- The academic achievement gap is eliminated
- Everyone in our community has a home
- Community members seek understanding and awareness of their own power and privilege and actively work to end poverty in our County
- Poverty is not generational. If it exists, it is intermittent and brief
- Everyone in our County is able to thrive and meet their needs—housing, food, transportation, education, health expenses and childcare.

### **Mission**

We connect people, resources and organizations together to create a thriving community for everyone.

### **Core Values:**

**EQUITY-** We pursue greater access to opportunities and resources for all. Our workplace practices, culture and impact reflect our commitment to justice and fairness.

**INCLUSIVENESS-** Those we interact with feel valued, respected and supported. We seek out diverse voices and perspectives to inform our work.

**COMMUNITY-** We advance our mission through collaboration. We share decision making, power and resources.

**VOLUNTEERISM-** We value contributions of time and talent. We continuously seek opportunities to engage volunteers in our work.

**CARING-** We display empathy with those we work with and assume the positive intention of others.

**INTEGRITY-** In all our actions we will choose to do the right thing even though it may not be the easiest thing.

### **Equity Statement**

Equity is the foundation of our work, from our engagement with donors, to our investment of resources across neighborhoods in our community, and in our interactions with the public. We define equity as the presence of justice and fairness within the procedures, processes, and distribution of resources by institutions or systems.<sup>1</sup> We commit to equity as a core value and practice in order to advance our mission of connecting people, resources and organizations together to create a thriving community for everyone. Our mission compels us to prioritize historically and systematically excluded or marginalized people. Focusing on race, ethnicity and socio-economic status, as well as other intersectional identities, is necessary to end the historical, social and systemic inequities that persist in our County.

We acknowledge that we can only be successful if we recognize, develop and support leaders from within under-represented neighborhoods in our County. United Way is committed to engaging these leaders as partners, donors, and volunteers. Further, we commit to intentionally creating pathways for them to be included in decision-making and leadership roles within our own and other organizations. We can only eliminate inequity when all individuals reach their fullest human potential.<sup>2</sup>

We maintain that building and sustaining equity in our County requires an ongoing commitment to diversity and inclusion that must find full expression in our organizational culture, values, norms, and behaviors and those of our partners.

### **Equity in our Own Operations**

UWWC recognizes that its effectiveness will be enhanced and its mission well served when equity is reflected in all aspects of the organization and specifically when the following are achieved:

- **Board Membership & Employment-** Our board, committees and staff are reflective and inclusive of Washtenaw County's diverse communities.
- **Programming & Community Investment-** We create and implement programs that recognize cultural differences and treat all clients with dignity. We are committed to using an equity lens to clarify objectives, shape strategy and invest resources in pursuit of racial and economic justice.
- **Policies and Procedures-** Our commitment to equity is evident in the fair and equitable application of our organizational policies and procedures, as part of our strategic plan, and within our organizational goals.
- **Donors-** We share our commitment to diversity, inclusion and equity as a core value and practice with current and potential donors as well as our corporate partners and encourage them to consider and embrace these values.

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<sup>1</sup> Definition provided by the D5 Coalition and Michigan Nonprofit Association/NEW Center's Diversity, Equity and Inclusion Toolkit

<sup>2</sup> Adapted from United Way of the Colombia-Willamette's [statement on equity](#).

It is our belief that United Way's demonstrated commitment to equity represents an organizational standard for the nonprofit sector.<sup>3</sup>

### **Process**

The last strategic plan was developed in 2013 for 2014-17 with Pam Smith, our then new CEO. It laid the road map for a number of successful initiatives including VolunteerWashtenaw.org, the Poverty Initiative and the Financial Stability direct service program.

In May of 2016, UWWC developed a small strategy group to begin looking at concerning trends; this group transitioned into a strategic planning committee in late 2016. During the strategic planning process we identified three key issues; a realization that poverty as a consequence of inequity should be the core part of our grant decision making process, our declining revenue stream is affecting our ability to meet demand, and our decline in internal capacity is at a critical juncture.

Strategies have been developed to address all three issues. We have adopted an equity lens through which to evaluate our work, seeking to embed the notion of equity into all facets of our work, from grant making and fundraising to policy decisions and governance. Through its use, we aim to increase UWWC's ability to discuss and confront implicit biases and provide equitable access to opportunities for all residents. Strategies and upcoming board discussions will focus on how resources are utilized (e.g. investments grant programs, organizational overhead, and operations), how fundraising can be further enhanced and building a Futures Fund to support a growth investment strategy to ensure both our sustainability and enhanced internal capacity.

UWWC leadership, board, staff and volunteers in the strategic planning committee developed the strategic plan over the last 12 months by:

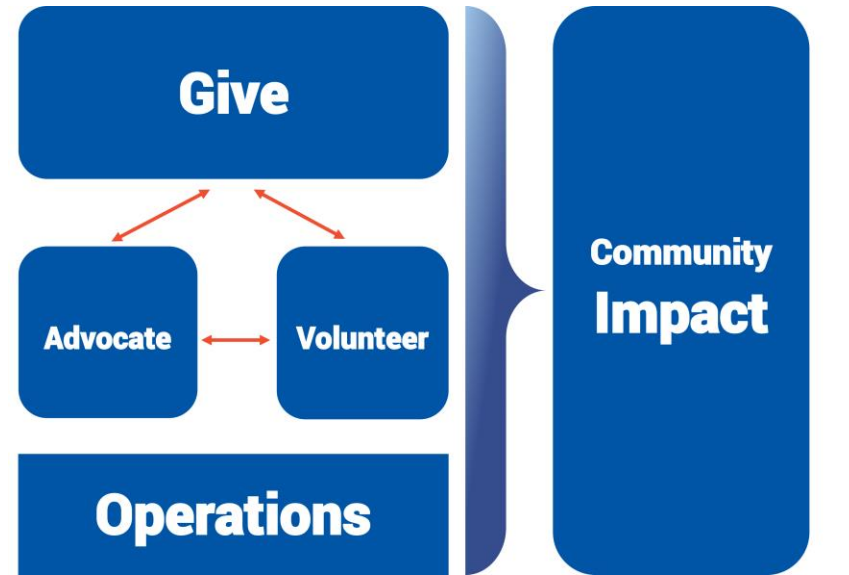
- Reviewing best practices in non-profit management, fundraising, grant making and DEI (diversity, equity, inclusion) to ensure the advancement of our mission
- Forming an Equity Committee in January 2017 to engage diverse community voices with both lived experience and professional expertise in issues of DEI to examine opportunities to infuse DEI in programs, operations and governance.
- Holding a board level retreat in January 2017 to develop a common understanding of DEI and to develop an equity statement for UWWC
- Retaining an independent consultant specializing in DEI
- Examining national and local fundraising trends and benchmarking against peer institutions
- Engaging leaders from the public, non-profit and business communities to gather feedback and to contribute ideas for the emerging work
- Holding community conversations, a youth listening session, and administering a survey to gather additional input

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<sup>3</sup> Language adapted from the Michigan Nonprofit Association and NEW Center's Diversity, Equity and Inclusion Toolkit

## Core Strategies

We advance our mission through five core strategies: Community Impact, Give, Advocate, Volunteer and Operations. The graphic below illustrates the relationship among these core strategies, and how they support the achievement of positive community impact.



Each core strategy has a corresponding goal and detailed objectives to promote equitable outcomes and community impact, as described in the full strategic plan.

### **FY2018-2021 Strategic Plan Overview**

Below are the goals and objectives associated with each of our five core strategies.

#### **STRATEGY 1: COMMUNITY IMPACT**

**Goal: We support solutions that address inequity and poverty in our community.**

Objective 1: Sustain our financial stability initiative through resource development, permanent staffing, and continued community collaborations.

Objective 2: Collaborate with COFU to increase the total resources available to advance on shared community level outcomes.

Objective 3: UWWC will build leadership in and become recognized for equitable community outcomes.

## **STRATEGY 2: GIVE**

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**Goal: Our commitment to equity, justice and improved community outcomes inspires our community to increase UWWC resources.**

Objective 1: Optimize donor engagement and stewardship to generate new donors and increase resources under management.

Objective 2: Build new, and revitalize existing, affinity groups and committees.

Objective 3: Increase revenue by building strong brand awareness and local “value-add” profile; invest in enhanced marketing and communications directed at diverse audiences.

Objective 4: Community Impact team and Resource Development team work together to provide message of high community impact, including DEI, directly to donors.

## **STRATEGY 3: ADVOCATE**

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**Goal: UWWC works to build trust and purpose in the community to address historical and structural inequities on behalf of all.**

Objective 1: Deliver a consistent message that highlights issues impacting our priority populations through effective use of social media and strategic communications.

Objective 2: Staff and key volunteers will use advocacy as a strategy to advance UWWC’s mission.

Objective 3: UWWC provides meaningful and accessible avenues for all to get involved in systemic solutions and to act as change agents

## **STRATEGY 4: VOLUNTEER**

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**Goal: UWWC inspires and mobilizes all people to invest their time, passion and talent in our community.**

Objective 1: UWWC’s Board of Directors will provide inspired organizational leadership and exemplary governance as representatives of the communities we serve.

Objective 2: Align Volunteer Engagement with Resource Development to deepen corporate community engagement and partnership

Objective 3: Align Volunteer Engagement efforts with UWWC priority areas

Objective 4: UWWC will be a local leader in Volunteer Management best practices

## **STRATEGY 5: OPERATIONS AND ACCOUNTABILITY**

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**Goal: A passionate, diverse and committed team is the heart of an effective and efficient organization.**

Objective 1: Change business model to ensure UWWC's long term sustainability and impact.

Objective 2: Increase and strengthen the organizational capacity to support diversity, inclusion and equity.

Objective 3: Foster an inclusive environment and provide staff with professional development opportunities to build expertise, strengths and skills

Objective 4: Ensure UWWC has an optimal infrastructure to successfully advance mission and support evolving business model

### **Acknowledgements**

UWWC would like to thank the Chair of our Board of Directors and of the Strategic Planning Committee, Karen Bantel, for her leadership throughout the process. Thanks to Yodit Mesfin-Johnson and Scott Menzel, board members, who served as the Co-Chairs for the Equity Committee.

We also want to thank all of the members of the Strategic Planning and Equity Committees.

Strategic Planning Committee – Karen Bantel, David Canter, David Clifford, Bill Fileti, Steve Dobson, Jackie Jenkins, Doug Strong, Pam Smith, Bridget Healy, Val Kennings, Susan Smith, Deb Bratkovich

Equity Committee - These individuals came together to create a new group that tackled sensitive issues and embodied the principles and values that drive the entirety of our work: David Clifford, Dr. Hsiao-Wen Lo, Ellen Rabinowitz, Karen Bantel, Katie Van Dusen, Megan Mazurek, Melvin Parsons, Morghan Williams, Nancy Heine, Bridget Healy, Pam Smith, Pastor Willie Powell, Scott Menzel, Teresa Gilotti, Tim Damschroder, Vince Price

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Thanks also to UWWC staff for contributing countless hours doing research, collecting data, participating in discussions, defining values, and providing the support needed to develop this plan.

Inquiries about the strategic plan can be directed to [psmith@uwwashtenaw.org](mailto:psmith@uwwashtenaw.org)

### **Appendix**

