



A FUTURE OF INNOVATIVE IMPACT AND THRIVING UNITED WAYS.

VISION 2027: STRATEGIC PLAN 2017-2020

Indiana United Ways





PLANNING A THRIVING FUTURE

IUW's (Indiana United Ways) VISION 2027 is to build a future of thriving United Ways in Indiana. Our United Way community worked hard to get this plan right. As we turned outward and reviewed the data, we learned about the broader social, technological, economic and political realities of Indiana. We also looked inward to make honest assessments about where our strengths are as a network and where we might be falling short. In this first leg of our VISION 2027 journey, we are striking a balance between a focus on fundamental best practices for success and leaning into innovation for Indiana's 60 United Ways and Funds (referred to collectively as United Ways or members.)

The deep engagement of our Board, our members, our staff and allies developed a plan with a sense of excitement and urgency for that future state of thriving. Despite the challenges facing United Ways and our nonprofit and philanthropic peers around the country, we are feeling momentum to courageously seize the opportunities ahead. Globalization, changing demographics, and new economies are forcing us to work differently to meet the needs of our communities. Through a renewed commitment to best practices and with many collaborative partners, together IUW and Indiana's United Ways can tackle the most complex problems facing our communities and our state.

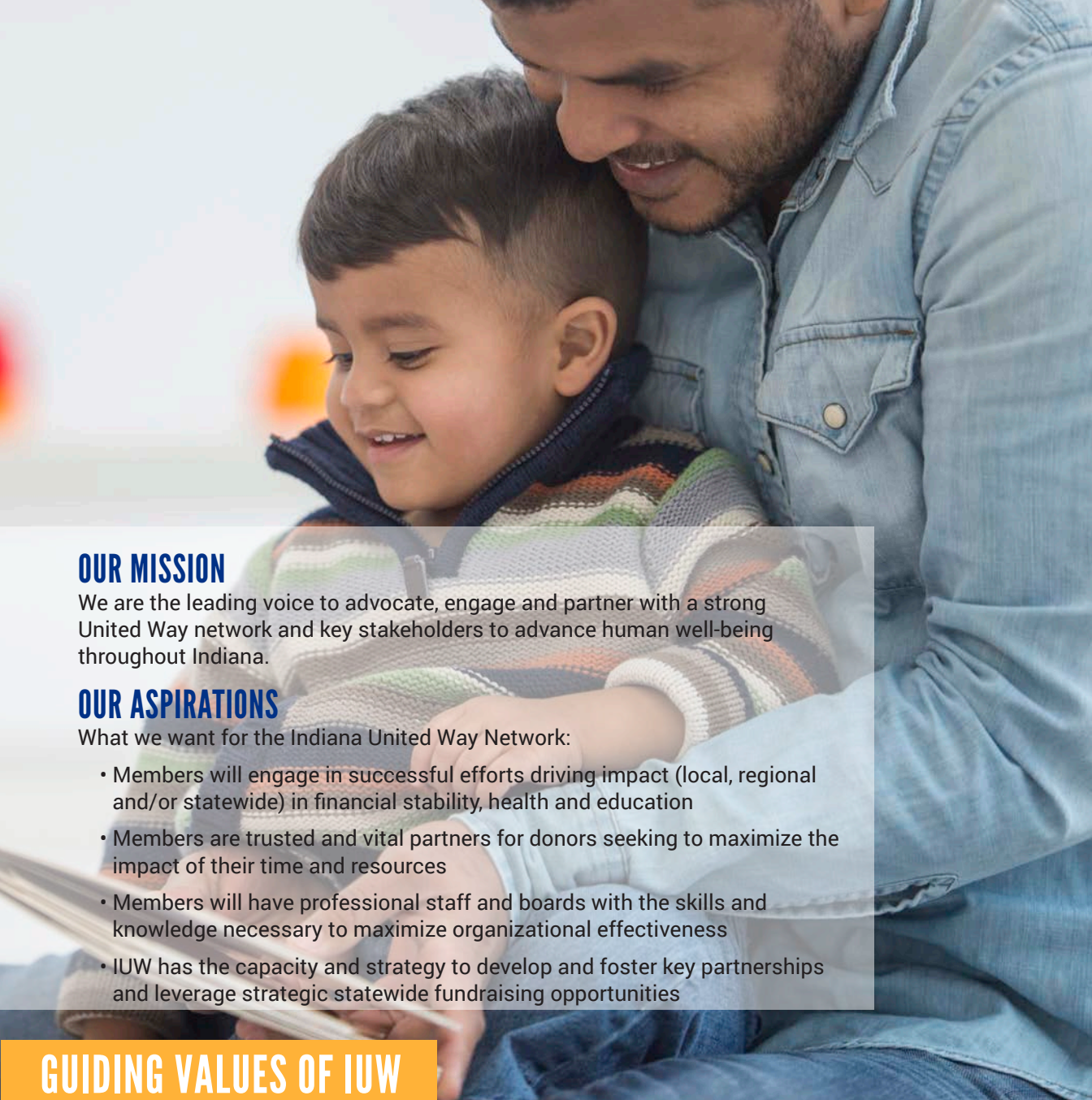
Our iterative planning process was grounded in United Way Worldwide's business model and its Five Bold Plays for United Ways to move forward in a unified network-wide strategy. With that basis, this plan is focused on moving the needle statewide in four priority areas most critical to the optimum functioning of United Ways in Indiana—so that United Ways are best positioned to fight for the health, education and financial stability of every individual in every community.

We welcome your partnership in building thriving United Ways and a stronger Indiana!

Sincerely,

Maureen Noe
President/CEO,
Indiana United Ways

Sarah Nahmias
IUW Board Chair, 2016



OUR MISSION

We are the leading voice to advocate, engage and partner with a strong United Way network and key stakeholders to advance human well-being throughout Indiana.

OUR ASPIRATIONS

What we want for the Indiana United Way Network:

- Members will engage in successful efforts driving impact (local, regional and/or statewide) in financial stability, health and education
- Members are trusted and vital partners for donors seeking to maximize the impact of their time and resources
- Members will have professional staff and boards with the skills and knowledge necessary to maximize organizational effectiveness
- IUW has the capacity and strategy to develop and foster key partnerships and leverage strategic statewide fundraising opportunities

GUIDING VALUES OF IUW

INTEGRITY



INCLUSIVENESS



IMPACT

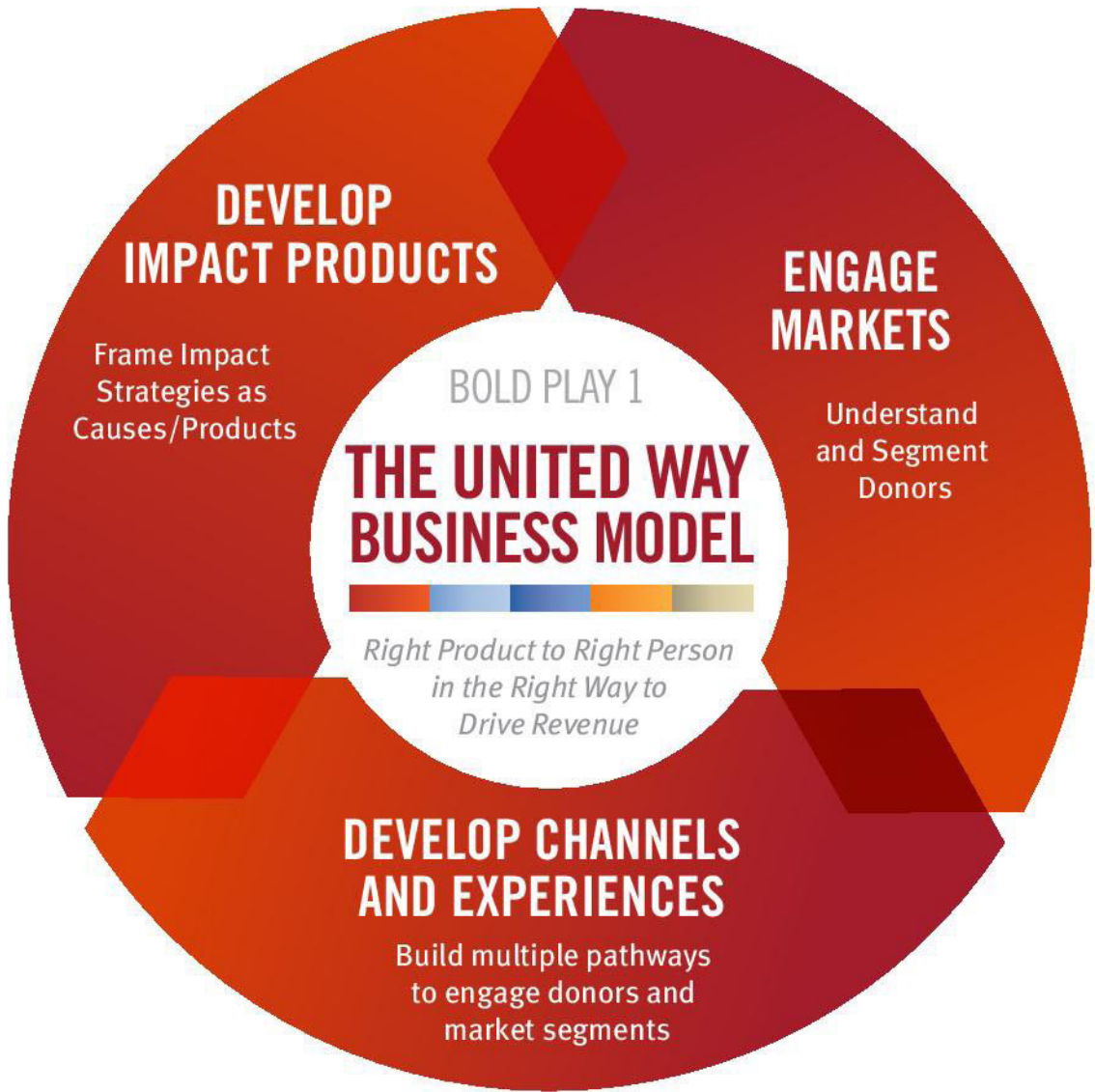


COLLABORATION



COMPASSION





STRATEGY AND OPERATING POLICIES

EXECUTIVE SUMMARY: STRATEGIC PRIORITIES AND GOALS



STRATEGIC PRIORITY 1: COMMUNITY IMPACT

Indiana's quality of life is improved, especially for our most vulnerable

- a. Expand and enhance members' efforts to determine and address community-wide goals
- b. Leverage workforce and economic development partnerships and strategies
- c. Effect system change to positively impact health and human service issues



STRATEGIC PRIORITY 2: INVESTOR DEVELOPMENT AND RELATIONS

Members are seen as outstanding stewards and managers of donors' time and money

- a. Increase human and capital resources available to members from their local communities
- b. Support member efforts to increase resources under management
- c. Increase awareness of United Way's value



STRATEGIC PRIORITY 3: GOVERNANCE AND TALENT MANAGEMENT

Members are seen as exemplary models of nonprofit management and governance

- a. Nurture and grow the number of high performing professionals and volunteers
- b. Increase the number of member volunteers following good governance practices
- c. Expand the number of thriving members utilizing strong operational practices



STRATEGIC PRIORITY 4: IUW AS THOUGHT LEADER

IUW is recognized as a state and national thought leader

- a. Be seen as a thought leader by members and external stakeholders
- b. Develop IUW as a fiscally sound organization
- c. Pursue and implement innovative programs

THE CASE FOR COMMUNITY IMPACT

More than 1 in 3 Hoosier households cannot afford the basics of housing, food, health care, child care and transportation, despite working hard.



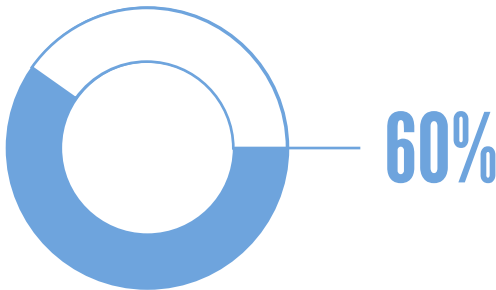
14%

About 14% of Indiana households live below the poverty level.



22%

Another 22% of Indiana households live above poverty but below the basic cost of living.



To improve our Community Impact, Indiana United Ways need to adopt United Way Worldwide's Business Model. **But almost 60% (36) of IUW members are still focused on the traditional allocations model.**

ASPIRATION

Members will engage in successful efforts driving impact (local, regional and/or statewide) in financial stability, health and education



STRATEGIC PRIORITY 1: COMMUNITY IMPACT

Indiana's quality of life is improved, especially for our most vulnerable

GOALS

- Expand and enhance members' efforts to determine and address community-wide goals
- Leverage workforce and economic development partnerships and strategies
- Effect system change to positively impact health and human service issues

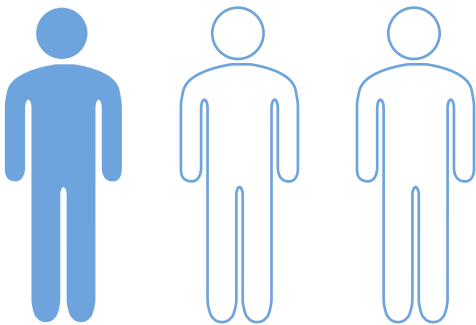
PERFORMANCE TARGETS

1. Members utilize the UWW Business Model (moving from a BPI classification* of A to B/C in implementation of Community Impact strategies – see page 3)
2. Members access Matching Fund Grants to increase Community Impact work

THE CASE FOR INVESTOR DEVELOPMENT AND RELATIONS

Nationally, over the last twenty years, the **number of individual donors to United Way dropped by half.**

The percent of donors who have access to **UW workplace giving also dropped by 50%** over the last twenty years.



1 OUT OF 3

Less than 1/3 of adults see United Way in 2 or 3 of our impact areas of financial stability, health, or education. Almost half don't know what we do.

ASPIRATION

Members are a trusted and vital partner for donors seeking to maximize the impact of their time and resources



STRATEGIC PRIORITY 2: INVESTOR DEVELOPMENT AND RELATIONS

Members are seen as outstanding stewards and managers of donors' time and resources

GOALS

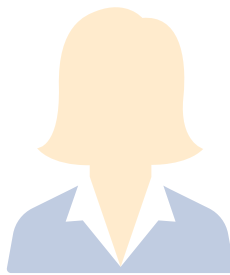
- Increase human and capital resources available to members from their local communities
- Support member efforts to increase resources under management
- Increase awareness of United Way's value

PERFORMANCE TARGETS

1. Increased resources under management among our members
2. Increased corporate giving

THE CASE FOR GOVERNANCE AND TALENT MANAGEMENT

1 in 3 Local United Way executives has **two years or less tenure.**



2 OF 3 EXECUTIVES HAD NO PREVIOUS WORK EXPERIENCE AT A UNITED WAY.

ASPIRATION

Members will have professional staff and boards with the skills and knowledge necessary to maximize organizational effectiveness



STRATEGIC PRIORITY 3: GOVERNANCE AND TALENT MANAGEMENT

Members are seen as exemplary models of nonprofit management and governance

GOALS

- Nurture and grow the number of high performing professionals and volunteers
- Increase the number of member volunteers following good governance practices
- Expand the number of thriving members utilizing strong operational practices

PERFORMANCE TARGETS

1. Members demonstrate proficiency in at least 40% of UWW CPO and Board Core Competencies by 2020
2. Members become more financially sound with at least 3-6 months of cash reserves

THE CASE FOR IUW AS A THOUGHT LEADER



ASPIRATION

IUW has the capacity and strategy to develop and foster key partnerships and leverage strategic fundraising opportunities



STRATEGIC PRIORITY 4: IUW AS A THOUGHT LEADER

IUW is recognized as a state and national thought leader





GOALS

- Be seen as a thought leader by members and external stakeholders
- IUW is fiscally sound
- Pursue and implement innovative programs

PERFORMANCE TARGETS

1. Members and external partners view IUW as a thought leader
2. State or national collaborations that move local, regional or statewide Community Impact work

PERFORMANCE TARGETS

| |  COMMUNITY IMPACT |  INVESTOR DEVELOPMENT AND RELATIONS |  GOVERNANCE AND TALENT MANAGEMENT |  IUW AS A THOUGHT LEADER |
|----------------------------|--|--|--|---|
| TARGETED BENCHMARKS | Members move from a BPI classification of A to B/C | Resources under management | Members demonstrate proficiency in UWW CPO and Board Core Competencies | Members and external stakeholders view IUW as a thought leader |
| | Members access the Matching Fund Grants | Corporate giving increased | Members have at least 3-6 months of cash reserves | State or national collaborations move local/regional/statewide community impact work |
| TRACK AND REPORT | UW/UF showing progress on Community Impact work | Individuals volunteering with UW/UF | Members have succession plans | IUW facilitates and launches innovative programs |
| | Members have strategic relationships with local/regional workforce/economic development boards | Individual donor giving with UW/UF | Members within target range for management and fundraising expenses | IUW revenues are diverse and expanding |
| | Statewide dashboard shows progress in members' measures | Total campaign dollars raised | Members moving up the Harwood turning outward scale | IUW is fiscally sound ending each year with a modest revenue balance |
| | UW/UF executives report IUW's advocacy work has enhanced the effectiveness of their CI work | Individuals are aware of United Way's work | Volunteer/staff/board demographics more closely mirror community demographics | Current members renew their membership every year |

ACKNOWLEDGEMENTS

IUW's Strategic Plan was developed throughout 2016 with time and ideas contributed by well over 100 people, and we are very grateful.

Those organizations that gave voice and perspective to the Plan include:

Early Learning Indiana
Indiana Institute for Working Families
Indiana Minority Health Coalition
Indiana Philanthropy Alliance

Lilly Endowment Inc.
Prosperity Indiana
Serve Indiana
The Corydon Group
United Auto Workers

We would also like to thank those who made special contributions to this plan.

BETA TEAM MEMBERS

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