



United Way
Greater Victoria



At United Way there is strength in numbers.
Our red bench symbolizes stability and inclusivity
and there is room for all.

STRATEGIC PLAN
2017 - 2022

PROMISING THE **POSSIBILITY** OF A BETTER LIFE FOR EVERY PERSON

We believe that at the heart of a healthy community are people who care – not just for themselves – but for those around them. Through thousands of invisible threads, we deliver hope and possibility, changing lives every day. And that's only possible because we live in a community that cares.

We are fortunate to call this corner of Canada our home, but did you know it has one of the highest cost of living averages in the country, alarming child poverty rates, and growing numbers of homeless people, working-poor families and isolated seniors? These are just some of the tough challenges we face as a community, but together we can find solutions to local issues. Together, we can provide opportunities for those who at times may look for a hand up in life and a place to turn when it is needed most.

“Many people in our community don't know how far-reaching the help of United Way is. It sees the gaps that exist and provides funding to close them so people have access to a full continuum of care on their path of healing. - Chris, former client and now employee at Umbrella Society”



possibility



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EXECUTIVE SUMMARY

United Way Greater Victoria (UWGV) is part of a national and global movement that acts locally. We are integral to the well-being of our community and in times of calm and crisis can be counted upon to serve the needs of our region's citizens, working together with our many partners, donors and volunteers collectively in a "united way".

Our mission is to improve lives and build community by engaging individuals and mobilizing collective action. As the region's largest annual funder of local social service programs, our role as a community leader, advocate, influencer and builder is critical to our mission.

We undertake our work with the support and active participation of our donors and stakeholders. This collective community engagement sets United Way apart in our sector. We know that we are stronger together and that through our combined efforts, the funds we raise are changing lives.

Just as critical to our mission is our ability to invest the funds that we raise into the areas that will have the greatest impact and will best serve our citizens and our community.

UWGV sets itself apart in the region as a multi-year funder that understands the needs of our community and supports a strong and stable network of services. We are also an impact funder focused on delivering programs and services in three priority areas: **All that Kids Can Be, From Poverty to Possibility and Strong Communities.**

For the past 80 years, we have raised \$160 Million to invest in thousands of community programs and services aimed at helping to improve the lives of adults, children, youth and families.

Looking ahead, the Board of Directors has signalled a direction for UWGV that includes the continued support for the community impact model, with a renewed emphasis on United Way's community leadership role within a changing philanthropic environment.

The 2017-2022 Strategic Plan outlines the need for United Way to evolve its business model to meet the demands of the sector and its stakeholders, by expanding organizational and fund development capabilities in order to increase donor engagement and satisfaction; and to ensure long-term financial sustainability.

In pursuit of these strategic goals, the Board and senior leadership have identified five strategic pillars under which the work of the organization will continue to be prioritized:

- Strategic Leadership
- Resource Development
- High Performance Organization
- Community Engagement & Investment
- Leveraging Our Brand

There are significant challenges facing the sector and the region and UWGV recognizes that its role has never been more important. Under this strategic plan, UWGV will focus on meeting the immediate needs of our most vulnerable citizens and will continue to respond to the emerging needs in our neighbourhoods, while looking to the future to address the most pressing social issues facing our community.

We will continue our commitment of providing community leadership, by working with our donors and our many stakeholders including business, labour, government, funded partners and the non-profit sector. We are committed to working together in a united way to build a strong, caring and inclusive community because we know that **Together, We Are Possibility.**

ABOUT UWGV

United Way Greater Victoria is part of a national and global movement that acts locally. As the region's largest annual funder of local social service programs, UWGV's role as a community leader, advocate, influencer and builder is integral to its mission. UWGV is fortunate to have the confidence and active participation of donors and stakeholders supporting its cause; through combined efforts, the funds UWGV raises are changing lives.

UWGV is an impact funder focused on investing dollars raised into programs and services that will have the greatest impact and will serve citizens and the community best under three priority areas:

- All that kids can be
- From poverty to possibility
- Strong communities

Working in collaboration with the non-profit sector and research partners, UWGV focuses funds into the community in a manner that ensures a strong and stable network of services. The organization recognizes that it is rare for individuals or families to access just one service or program. UWGV's understanding of the network of services needed to support the region's most vulnerable citizens is something that sets it apart in the non-profit sector.

In 2017, UWGV celebrates its 80th anniversary proud of its history, recognizing its leadership role in the sector and committed to a future that brings hope and possibility for all within a strong, caring and inclusive community.



A proud history. A promising future.



inclusion

UWGV'S MANDATE

Under a global mission to improve lives by mobilizing the caring power of communities to advance the common good, UWGV invests in local and regional programs and services that have proven their power to produce positive change. With a view on outcome and impact, UWGV assesses the issues confronting the region, accounting for the needs of its most vulnerable citizens, while striving to build a strong and inclusive community.

UWGV seeks information about the community through research, committee work, connection with service providers and access to knowledge from the United Way network. Regular consultations are made with community experts who bring front-line experience, in-depth knowledge and timely relevant data to enhance the organization's understanding.

UWGV comes together with the community to raise funds, understanding the challenges and opportunities within the region. Working collectively with thousands of donors, UWGV builds capacity in local neighbourhoods for services and programs to reach and assist people in times of need.

UWGV is recognized for its unique role amongst non-profits, fund development and community investment organizations. Entrusted by donors, partners and the community with the "collective good" of the region, UWGV is a leader in the sector. UWGV takes this responsibility seriously and with a willingness to work together with stakeholders, strives to meet this challenge every day.

Furthermore, it is UWGV's responsibility to convene, facilitate and collaborate to ensure it creates awareness of social trends and an understanding of complex social issues. As an organization, UWGV is uniquely placed in the community with a comprehensive mandate that goes beyond fundraising and community investment to include:

- Strengthening the network and capacity of non-profit community services
- Convening and leveraging community resources including strategic partnerships with government business, community, labour and non-profit organizations
- Influencing policy, systems and public attitudes



collaboration

STRATEGIC DIRECTION - PROGRESS TO DATE

In the early stages of the last strategic plan 2011-2016, a significant change to the community investment model was undertaken by United Way Centraide Canada and its member organizations including UWGV. The move focused the network on not only its fundraising mandate, but on an impact model for community investment under three priority impact areas:

- All that kids can be – supporting children and youth with the resources and opportunities they need to grow up healthy and achieve success
- From poverty to possibility – building people's capacity to move from poverty toward self-sufficiency and well-being
- Strong communities – develops the capacity of people to care for themselves and their families and building inclusive communities



The Board approved a new Community Investment Framework in May 2011 that provides the foundation for UWGV's funding decisions and strategically guides day to day operations to:

- Further UWGV's commitment to making long-term positive improvements to the quality of life in the region
- Align UWGV's vision for a strong and caring community with its financial investments and social change efforts
- Increase to the fullest the impact of UWGV's investments in funded community partners
- Enhance accountability and communicate clearly what changes are occurring in UWGV

This move began a journey of transformation for United Way, from an organization primarily focused on fundraising and distributing funds, to an organization whose mission is to provide leadership that addresses the community's most pressing social issues and creates measurable change.

NEW LEADERSHIP

In 2014, with a senior leadership change under a new CEO, the Board of Directors signalled a direction for UWGV that included the continued support for the impact model and a renewed emphasis on United Way's community leadership role within a changing philanthropic environment.

The Board recognized the need for UWGV to evolve its business model to meet the demands of the sector and its stakeholders through building organizational capacity and fund development capability to increase donor engagement and satisfaction; and to ensure long-term financial sustainability.

Since that time, the executive team working with direction from the Board of Directors, UWGV have moved forward on several Board-approved initiatives including:

- A refined community investment funding process informed at every level by community experts
- A three-year community investment strategy, reinforcing a commitment to multi-year funding
- A plan to invest in individuals giving by *Building our Philanthropic Approach*; diversifying revenue streams and evolving the business model
- A commitment to technology adoption through online giving, e-pledge and online community investment granting and impact measurement
- A commitment to fund core online services for bc211 for the region and support fundraising efforts to bring full 211 services to Vancouver Island
- A facility assessment which resulted in a decision to sell UWGV's building and lease appropriate space to provide a working environment suited to current and future needs

Additionally, UWGV's executive team, management and staff strove to employ best business practices and build business processes in all areas of the operations. This work, along with the generosity and participation of UWGV donors and partners, allowed the organization to continue to fund 109 programs and help to changes the lives of over 110,000 children, youth, adults and families in the region in 2016.



STRATEGIC PLAN DEVELOPMENT

The United Way Movement across Canada

The United Way Centraide Canada (UWC Movement) is at a pivotal moment in its existence and leaders across the movement were involved in guiding the strategic planning process that resulted in the Strategic Directions 2014-2024 for the United Way Centraide Movement of Canada.

The UWC Movement is responding to rapid acceleration in technology and the behavioural shifts that come with it. The movement is coping with economic strains, as income disparity increases and fluctuating global markets create feelings of insecurity. The population of the country is more diverse and more in need of services, as governments shift their role and restrain their budgets.

The Canadian Philanthropic Landscape

There are significant shifts in the philanthropic landscape, not only for UWCC but for all non-profits. UWCC has identified key trends* and as a member organization these trends are considered in UWGV's planning:

- Significant demographic shifts are having a considerable impact on the nature of communities. These include the expectations and aspirations of youth and the aging population; Aboriginal People's aspirations for change; and the diversity brought about by trends in immigration, urban intensification, rural depopulation, and growing geographic relocation.
- Our societal fabric has changed. It is both enriched by new skills, views, cultures and philosophies, yet fragmented when people adopt a closed-group approach in the face of so much complexity.
- The online revolution is fueling new attitudes and behaviours. Technology, including the Internet and social media, facilitates interconnectedness and citizen engagement, makes possible a tailored approach to individuals' needs and fosters a desire for immediate response.
- Information and Big Data⁵ have become very powerful tools. More than ever before is known about the interests, behaviours and attitudes of community members and offers incredible opportunities to use that knowledge to foster change.
- Public trust in institutions is waning and calls for greater transparency and accountability are on the rise.
- Fiscal capacity is constrained, government social spending is reduced and there is a prosperity gap around income, housing, health, and education.
- Global issues have come closer to home through technology, the environment, the economy and immigration. Issues that were once far removed are now directly impacting communities and families living in an increasingly borderless world.

⁵ Big Data refers to the abundance of data sets that are large, complex and difficult to process, yet it is also a new approach to understanding the world and making decisions. (http://www.nytimes.com/2012/02/12/sunday-review/big-data-impact-in-the-world.html?pagewanted=all&_r=0)

* Trends affecting our work in Canada - Strategic Directions 2014-2024 UWC Movement of Canada (Released September 2013)

STRATEGIC PLAN DEVELOPMENT CONT.

A Collaborative Process

This strategic plan for UWGV is informed by the Strategic Directions 2014-2024 for the United Way Centraide Movement of Canada and guided by input from a variety of stakeholders.

To represent UWGV's "stakeholder voice" local feedback was solicited from senior volunteers, donors, business partners, labour leadership, community service providers and non-profit organizations from across the region.

The UWGV Board of Directors and senior leadership team met over two facilitated strategic planning sessions to develop the future direction and priorities for this five-year plan.

The Board-approved 2017-2022 Strategic Plan reflects a compilation of these consultations and is informed by trends influencing the sector, strategic challenges impacting operations, and UWGV's work with its regional stakeholder network and United Way Centraide Canada.



STRATEGIC DIRECTION - VISION, MISSION & VALUES

The UWGV 2017-2022 Strategic Plan charts the course to achieving the vision and delivering upon the mission, while becoming an even stronger vehicle for social change in the region.

The Vision

A strong and inclusive community for all.

The Mission

To improve lives and build community by engaging individuals and mobilizing collective action.

The Values

Overarching:

Possibility: At the core of UWGV's work – created one act at a time, driven by unwavering support and belief that hope is the greatest gift – the organization will strive to deliver the promise of possibility each day.

At the Core:

Accountability: UWGV earns and maintains the trust and confidence of its donors, stakeholders and community through sound financial management, strategic community investment and open reporting on outcomes and results.

Collaboration: UWGV convenes, facilitates and partners with the community who in turn partner because they value the organization's collaborative spirit, leadership and work.

Inclusion: UWGV supports and champions the community's most vulnerable citizens and welcomes all community members to join in its cause.

Integrity: UWGV honours its mission to improve lives and build a strong and caring community and the organization is entrusted to demonstrate the courage to do the right thing.

In UWGV's Performance:

Excellence: UWGV believes in continuous improvement; challenging itself to do more through best practice and performance standards that push beyond stated goals while reaching for what is possible. Accountable to colleagues, Board Members and the United Way Movement the organization seeks to exceed the expectations of its community.

Innovation: UWGV cultivates an organizational culture that embraces flexibility, adaptability and seeks new ways to demonstrate leadership to achieve its goals.

Leadership: UWGV encourages, inspires and motivates others to participate in its mission and fosters confidence in its ability to understand and address the community's most pressing social issues and deliver superior results.

STRATEGIC PRIORITIES FOR 2017 - 2022



Strategic Leadership:

Build the organization's position as a collaborative and bold leader, a catalyst for positive change in the community.

Resource Development:

Engage the community through compelling, relevant and diverse philanthropic opportunities that change lives.

High Performance Organization:

Embrace a spirit of excellence focused on innovation, technology adoption and shared knowledge to expand the organization's capacity to build the strongest community.

Community Engagement & Investment:

Deliver outcomes and impact for the community through investments that encourage collaboration and inclusion to address immediate needs and systemic issues.

Leveraging the Brand:

Lead and inspire the community to champion and act on behalf of UWGV's cause.

integrity



MOVING FORWARD

As UWGV moves forward with a new strategic plan, efforts will focus on the most important issues within the priority areas (kids, poverty and strong communities), while responding to social issues as they arise within the region. Working closely with donors, community service providers and partners, UWGV is invested in creating measurable change. UWGV will demonstrate its role as a resourceful and ready partner to business, community and labour leaders alike. The organization will focus its efforts on driving organizational excellence and leading as a member of a global and national movement that acts locally.

There are significant challenges to address – the economic downturn, and corresponding decline in charitable giving and stagnant revenue growth for United Ways across the country.¹ There are increasing needs for vulnerable people in the region and the timeline needed to properly measure community outcomes must be balanced alongside the work to meet people's immediate requirements. The ability to meet these challenges will also be tied to UWGV's success in developing a culture of philanthropy within a changing charitable landscape, building organizational capacity to evolve the business model as a year round fundraiser and funder, and engaging donors through technology and stewardship.

Fortunately, UWGV also moves forward with great strengths – a trusted and respected brand; a proven history of convening people and building partnerships; a strong community investment framework and funding process, a commitment to delivering measurable impact and reporting back to the community; strong financial management with ethical and transparent business practices, and a community that cares – all driven and supported by tremendous volunteers and loyal, engaged and committed donors.

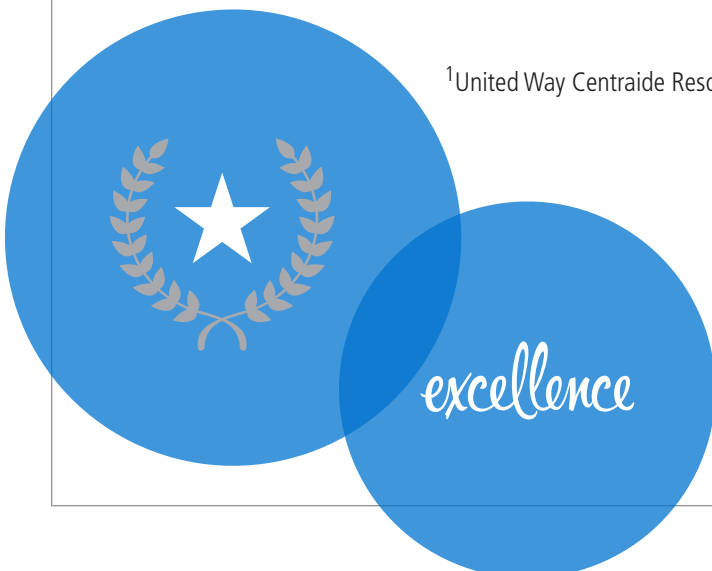
UWGV is looking ahead at a period of evolution through positive change – taking its place as a leader in the United Way movement and in Greater Victoria, addressing ongoing needs and changing priorities in its neighbourhoods while increasing its ability to engage others in the mission.

Furthermore, the Board has highlighted the need to:

- Act with a sense of urgency
- Be bold in our thinking and leadership
- Diversify revenue streams
- Develop a high performing organizations
- Create and extend partnerships with stakeholders

The new strategic plan will guide UWGV's efforts to enhance its leadership, engagement, collaboration, accountability, inclusion and excellence over the next five years. The corresponding operational plans will reflect the strategic directions, support key priorities and set measurements for performance. All of these efforts will reflect a collective approach, working together with the organization's many stakeholders in a united way, knowing that **Together, We Are Possibility.**

¹United Way Centraide Resource Development Report 2015 Campaign



5-YEAR STRATEGIC GOALS

1. Strategic Leadership

To demonstrate leadership for positive community change by:

- Leading and participating in initiatives and collaborative partnerships to leverage resources and influence public attitudes while advocating on behalf of the sector
- Participating in the movement through working with committees and networks and through delivering provincial and national initiatives that benefit local communities
- Sharing the organization's expertise and time to support the region's development
- Engaging at the forefront of emerging issues in partnership with stakeholders
- Applying strong governance practices to ensure informed, representative and active leadership at the board level and throughout UWGV's committee, council and cabinet structure
- Increasing UWGV's voice by engaging community leaders in meaningful volunteer roles that inspire opportunities for community contribution

2. Resource Development

To expand revenue development through an integrated approach by:

- Investing in Resource Development to diversify revenue streams and expand donor relations
- Defining and delivering value propositions to donors
- Responding to donor interests and needs through customization
- Delivering year-round fund development activities
- Contributing actively to the identification and relevant participation of new multi-year partnership opportunities
- Increasing retention rate of current donors
- Cultivating new prospects and legacy expectancies
- Upgrading current donors to increase average gifts
- Expanding research, segmentation and product development as tools for donor engagement

3. High Performance Organization

To embrace a spirit of excellence that expands the organization's capability, capacity and success by:

- Recruiting, training and developing a high performance team comprised of people who reflect UWGV's values, believe in shared responsibility and success, and are focused on achieving organizational goals
- Leveraging technology to improve organizational effectiveness and to increase access and interaction with donors and all stakeholders
- Advancing shared knowledge and best practice through effective use of technology
- Encouraging innovation and professional development; recognizing individual and team contributions
- Enhancing data collection in all areas of the organization to provide informed, data-driven decision making
- Investing and managing donor dollars in accordance with effective and professional business practices which safeguard assets and protects the organization's financial health
- Respecting and protecting donor interests and confidentiality
- Operating ethically, transparently and with accountability, using clear and accepted financial reporting methods, effective internal controls and compliance with legal and regulatory requirements

4. Community Engagement & Investment

To strengthen the community through collaborative efforts that deliver impact by:

- Increasing UWGV's relevance with donors by focusing investments on social impact in priority area(s) and through a responsiveness to emerging community needs
- Helping to build capacity for non-profit/charitable organizations to support strong networks of human and social services
- Building reciprocal relationships with funded partners for collective impact
- Monitoring and reporting on the results of donor investments
- Working with stakeholders in areas of mutual concern to increase understanding of social issues in the region
- Investing in research and resources that support community impact strategies and engagement opportunities

5. Leveraging Our Brand

To build champions for UWGV's cause by:

- Telling UWGV's story in compelling ways as a community impact organization and bold agent of change through varied communications platforms
- Deepening the understanding of donors and inspire them to act
- Demonstrating alignment with the global United Way network
- Communicating to and with stakeholders on matters of relevance related to priority areas
- Enhancing relationships with media as a partner in community building
- Demonstrating a year round presence and impact
- Resourcing and investing in communications and marketing efforts to increase donor retention, acquisition and future community investment



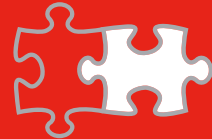
OUR VALUES



leadership



innovation



collaboration



integrity



possibility



excellence



accountability



inclusion



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