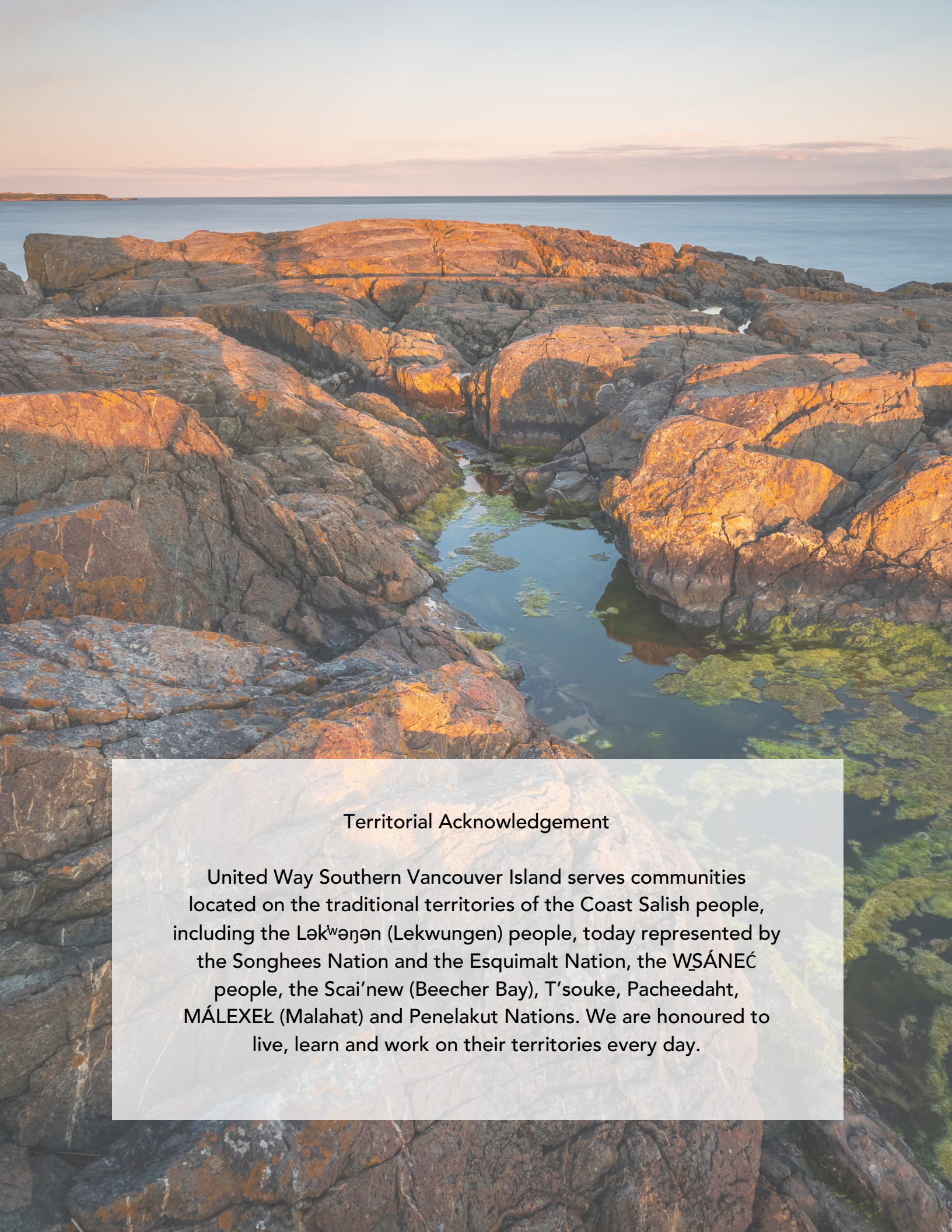




United Way
Southern
Vancouver Island

2023 - 2026 **STRATEGIC PLAN**

Uniting for Stronger Local Communities



Territorial Acknowledgement

United Way Southern Vancouver Island serves communities located on the traditional territories of the Coast Salish people, including the Ləkʷəŋən (Lekwungen) people, today represented by the Songhees Nation and the Esquimalt Nation, the W̱SÁNEĆ people, the Scaí'new (Beecher Bay), T'souke, Pacheedaht, MÁLEXEŁ (Malahat) and Penelakut Nations. We are honoured to live, learn and work on their territories every day.

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MISSION

Uniting to strengthen our local communities. It's the United Way.

VISION

Safe and resilient local communities where opportunity and belonging unite us.

OUR VALUES

Accountability: We earn and maintain the trust and confidence of our colleagues, donors, stakeholders and communities through strategic community programs, open dialogue, sound financial management and transparent processes and reporting.

Collaboration: We work together and commit to the possibility of producing an outcome greater than working alone, in the spirit of cooperation, leadership and respect.

Inclusion: We are committed to efforts to advance diversity, equity, inclusion and accessibility. This means acknowledging and embracing each person's uniqueness to develop stronger relationships, foster trust, respect and open dialogue.

Excellence: We excel in our work through a process of continuous improvement, challenging ourselves to improve through best practice and performance standards that encourage us to reach for what is possible.

Innovation: We cultivate an organizational culture that embraces ideation, flexibility, adaptability, partnership and collective action.

Leadership: We stimulate, inspire and motivate others to participate in our mission through our ability to build collaborations and solutions to address our communities' most pressing systemic social issues.



EXECUTIVE SUMMARY

We are committed to meaningful engagement, collaboration and collective action to find solutions to systemic issues that lead us to a better future, and stronger local communities. As we launch our new three-year strategy we are building momentum toward becoming a stronger, sustainable and more innovative organization. We will apply the United Nations' Sustainable Development Goals as part of our framework to achieve a better, equitable and resilient future for Southern Vancouver Island. Our mandate is local; everything we do is for the betterment of our region. We will focus on collaboration, shared expertise and solutions-based impact.

At United Way Southern Vancouver Island (UWSVI), we think of strategy as being a set of choices we make, defining the values we have and determining what actions we will take to achieve success. Our success is defined as accomplishing our most important goals, ensuring we align with our values and deliver on our purpose.

Our purpose is to improve the quality of life for all people living on Southern Vancouver Island and the Southern Gulf Islands, through collaboration and collective action — we unite to strengthen our local communities. We acknowledge the need to root our work in the principles of diversity, equity, inclusion and accessibility with a deep commitment to reconciliation.

UWSVI will continue engage and mobilize our diverse local communities to set priorities for collective action and advance community impact by: (a) influencing public attitudes, systems and policies; (b) focusing on underlying causes of social issues; (c) strengthening our network of services and the capacity of local non-profits, charities and the community; and (d) engaging and mobilizing our communities' financial resources, influence, and knowledge.

We are extending a call to action for our donors, partners and volunteers to unite and invest in our communities. We will lead innovation and co-create programs and new opportunities to address the most pressing social issues. We know it is the right time to reconsider our approach and look at how we can continue to work better, together.

This strategy is our new approach to supporting stronger communities. Our 2023–2026 Strategy provides clarity about the choices we will make over the next three years and beyond.



A handwritten signature in black ink, appearing to read 'Lisa Ippa'.

Board Chair



A handwritten signature in black ink, appearing to be a stylized 'E' followed by a flourish.

Executive Director

1.0 STRATEGIC CONTEXT

For more than 80 years, UWSVI has worked collaboratively to foster solutions to systemic challenges facing people in our community. Fueled by donors, businesses, volunteers, team members and community partners, we aspire to support a safe, resilient and inclusive community for all.

UWSVI is facing new and specific challenges to its success. The pandemic has had a dramatic and lasting effect on people in our community, significantly amplifying hardship and reinforcing the need for collaborative solutions across our region.

Additionally, Canada is expected to be in a recession for most of 2023. Aggressive monetary policy, high inflation, lower household spending and a continued slump in housing will cause GDP to fall 2.3% from Q4 2022 to Q3 2023.¹

During an economic downturn, working adults tend to spend less and save more. While household savings have slowed down since their 2020 peak, savings are still significantly higher than before the pandemic.² Like businesses and private households, not for profits are facing rising costs. We are facing increases in the costs of overhead and essentials and will see increasing wage pressures as new contracts are negotiated at the end of 2023.

While recessions don't necessarily lead to a decrease in donations, the funds available to charities are declining in real terms. The rising cost of living is a major concern. Demand for social services in our communities is likely to continue to grow.³

UWSVI has also gone through a period of significant change and disruption over the past 24 months and is in a starting position that requires a rebuilding of systems, relationships and priorities. This Strategic Plan recognizes the uncertainties of the changes occurring in our community and our economy as we meet the post-COVID-19 challenges and any subsequent impacts to people in our region.

It will be imperative to shift and look at new streams of revenue and resource development. Work will be done to analyze, build financial scenarios and understand the risks and opportunities of moving forward with the Future Forward strategy outlined at the February 2023 Board Retreat. It will mean that fiscal 2023/24 will be a "bridging year" as we explore new opportunities and develop a business plan to meet the long-term goals of organization.

¹ <https://www.oxfordeconomics.com/resource/key-themes-2023-a-year-in-recession-for-canada/#:~:text=Canada%20will%20be%20in%20recession,Q4%202022%20to%20Q3%202023.>

² <https://www.bdc.ca/en/articles-tools/blog/2023-economic-outlook-cause-caution-not-alarm>

³ <https://www.economicsobservatory.com/what-happens-to-charitable-giving-in-a-recession>

2.0 BRAND AND POSITIONING

UWSVI benefits from an over 80-year history on Southern Vancouver Island. Additionally, we are one of 1,800 affiliates under the United Way banner worldwide and have access to shared resources, research and peer networks that can support our team and organization as we move forward.

We also suffer from inconsistent and misunderstood messaging on our purpose and outcomes. The increased competition in the region by other charities, not for profits and United Ways has also eroded our brand as a leading charitable organization. The organization needs to evolve to ensure it continues to be relevant, sustainable and provide positive impact to our communities.

Southern Vancouver Island is an exciting, multi-dimensional and evolving region. To increase UWSVI's relevance in the communities we serve we will need to undertake an extensive and robust review of our marketing and communications to support a deeper understanding of our core brand attributes. A key part of this work will be to break away from past stereotypes and communicate a modern, fresh and accurate representation of who we are, and aspire to be, as an organization. The change will be driven by our focus on our strategic priorities, our unique proposition as a leadership hub of collaborative solutions and collective action, and the outcomes of our community impact work. The future marketing and communication should feel personalized through all channels and touchpoints.

3.0 STRATEGIC PRIORITIES AND OBJECTIVES

3.1 Anchor Our Work in Community Engagement and Impact

- Develop as a leadership hub for solution development to systemic challenges
- Adopt and refine innovative granting and service delivery frameworks
- Develop a strong government relations program

3.2 Grow Revenue and Improve Return on Opportunities

- Develop a strategic approach to revenue generation and fundraising
- Create compelling and relevant fundraising opportunities
- Adopt a growth mind-set and explore partnership opportunities

3.3 Support People and Culture

- Grow organizational capacity and resiliency
- Adopt a culture of success
- Develop as an employer of choice

3.4 Transform the Organization

- Embrace collaboration and collective action
- Adopt strategic and innovative processes
- Implement data-driven decision-making



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4.0 AREAS OF ACTION

Foundational to our work will be the integration of diversity, equity, inclusion and accessibility (DEIA) principles and actions in everything we do. This will require a stream of work to review all aspects of our organization and a shift in our practice. It is understood that this work will be ongoing and require a continuous improvement approach.

Additionally, as part of our commitment to reconciliation we will develop a comprehensive engagement and relationship-building plan to establish and improve UWSVI's relationships with First Nations, Indigenous and Métis peoples and support services that reflect the communities' needs and requests. We will also incorporate climate appreciation and an environmental sustainability approach into our operations.

Our three areas of action are:

Seniors – From isolation to connection

Aging with dignity: helping provide food security and connections to seniors for companionship, services and healthy aging.

Families in Need – From poverty to possibility

Opportunities for all: strengthening neighbourhood connections and access to resources for families, children and youth.

Mental Health and Addictions – Building strong and healthy communities

Wellbeing and connections: providing counselling, outreach and peer support services and collaborating on systemic solutions to navigating support for individuals with mental health and addiction challenges.



5.0 BALANCED SCORECARD/MEASURES OF SUCCESS

A balanced scorecard is an operational management tool that lists measures of success from four organizational perspectives: learning and growth, internal processes, customer (or in the case of nonprofits, clients/funding sources/stakeholders), and financial.

For an organization to be financially successful, it must be successful at supporting customer needs.⁴

1. To effectively raise money, an organization must understand and satisfy the philanthropic goals of their donors.
2. To satisfy the goals of donors, internal processes (e.g., donor stewardship) require both effectiveness and efficiency.
3. The learning and growth of employees must be supported to better serve donors. In supporting the learning and growth of employees, a process begins that eventually leads to organizational financial success, which leads to better supports for the communities served.
4. Quantifying a strategic plan into measurable terms results in the development of trackable success measures.

By monitoring measures, we more quickly determine whether something is working. If it isn't working, we can adjust before problems accumulate, costs increase, and resources get used.⁵ Perspectives that are commonly thought of as competing (e.g., financial vs. non-financial goals) are incorporated into the scorecard and are balanced. This is important because if we only focused on financial goals, for example, we deemphasize the value of continual employee learning and growth. Similarly, if we only focused on non-financial goals, we would deemphasize the importance of fundraising in helping our organization be sustainable. Taking a Balanced Scorecard approach incorporates building the capacity necessary for sustainable organizational growth and can be used as a measurement and communications tool. It facilitates transparency and encourages prioritization of the elements on the scorecard; it creates consistency in achieving the mission through daily actions.

To support our Balanced Scorecard approach, UWSVI will integrate the four Balanced Scorecard perspectives with the organization's strategic objectives and operational priorities. The drivers of success listed above form the foundation, underpinning each operational perspective to show how the components of strategy are linked and support each other.

⁴Source: Charity Village.

⁵<https://www.vu.edu.au/sites/default/files/the-balanced-scorecard-an-approach-to-performance-management-for-nfpps.pdf>
<https://bloomerang.co/blog/an-introduction-to-balanced-scorecards-for-nonprofits/>



6.0 MANAGEMENT AND ADMINISTRATION

UWSVI's Board of Directors has a single employee, the Executive Director (ED). The ED reports to the Chair of the Board of Directors, leads UWSVI's day-to-day operations, and is accountable for execution of strategy as well as organizational performance. The Director of Finance and Operations (DFO) has an indirect reporting relationship to the Chair of the Finance Committee (Treasurer) and the Chair of the Board of Directors with regard to the financial status and wellbeing of the organization.

UWSVI's executive management team comprises six roles: Executive Director; Director of Finance and Operations; Director of Marketing and Communications; Director of Development; Director of Corporate Giving and Partnerships; and Director of Community Impact.

UWSVI operates a lean structure and will be supported by a range of robust management and administration tools. Core tools will include (a) Balanced Scorecard which translate Strategy into operational terms and underpins performance measurement at multiple levels, (b) the development and implementation of a new comprehensive Human Resources Strategy which will guide human resources initiatives and administration, and (c) the sourcing and implementation of a new integrated Customer Relationship Management (CRM) system to inform, support and track service performance.



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