

**United Way of Kitchener-Waterloo  
and the Townships of  
Wellesley, Wilmot and Woolwich**

***Refocus:  
Greater Community Impact Starts Here***

**2007-2012**



In March 2006, the Board of Directors committed to completing a strategic plan to guide our United Way organization for greater community impact over the next five years. This commitment arose for two reasons:

1. The organization has unrealized non-financial assets and strong community connections. We knew we could be a stronger force in creating positive change in the community.
2. The collective philanthropy model that has been our mainstay for many years, which is based mainly on workplace campaigns, limits our ability to raise increased funds.

### **The big picture**

In recent years we have witnessed significant changes in our operating environment, including:

- increased competition;
- changes in corporate and donor attitudes, preferences and practices;
- increased demographic pressures and other social pressures;
- changes in technology

There is also a growing recognition that continued growth in both the annual fundraising campaign and allocations to agencies will not, on their own, be sufficient to effect positive social change. Our ability to raise funds in workplace campaigns, while still important, won't sustain us or set us apart in the not-for-profit sector. A strategic shift towards greater community impact aligns us with the United Way's provincial and national strategic initiatives. Recently, as a follow-up to the release of its strategic plan, United Way Canada- Centraide Canada released Standards of Excellence. These standards provide strategic "guidelines to achieve positive social impact - to operate as an effective community impact organization".

As an important part of our research and thinking, we have observed the successes of many other United Way agencies in Canada and the USA who have embarked on this strategic community impact journey. The strategic shift is causing them to:

- revisit their governance structures;
- forge new partnerships;
- change relationships with funded agencies;
- adjust their business operations;
- broaden resource development strategies beyond the traditional workplace campaign;
- shift staff roles, enhancing staff and Board capacity.

### **The local picture**

This shift has relevance within our community as well. While our local economy and way of life is vibrant and strong for many people, there are those who are being left behind. We need to do more to include everyone.

In early 2007, together with United Way of Cambridge and North Dumfries, we adopted shared priorities for regional impact. Together both United Ways are focused on creative approaches that achieve lasting impact within these priorities.

This plan identifies the objectives we will set for ourselves to affect this change in focus for our local United Way and to leverage our assets in new and meaningful ways.



## **Our vision**

“Together...Strengthening the Community for All”

## **Our mission**

“Through collaboration, build upon our community’s resources and strengthen our capacity to improve the quality of life for all.”

## **Our organizational values**

- Foster collaboration, embrace diversity, and focus on prevention
- Respect community wisdom and encourage citizen involvement
- Endorse innovation, partnerships, collective action
- Provide non-partisan leadership
- Demonstrate trust, integrity, transparency, inclusivity, and respect
- Encourage and promote volunteerism and volunteer leadership

## **Our regional priorities**

United Way of Cambridge & North Dumfries and United Way of Kitchener-Waterloo & Area are focused on creative approaches that achieve lasting impact so that:

- Children and youth reach their potential
- Families are stronger
- Neighbourhoods are inclusive and thriving
- Newcomers are welcomed and supported
- People are economically secure

## A shift in strategic direction

Our vision, mission, organizational values and priorities all play a significant part in guiding our organization today. In particular, programs and processes that add value to our community enhance our historical workplace fundraising role.

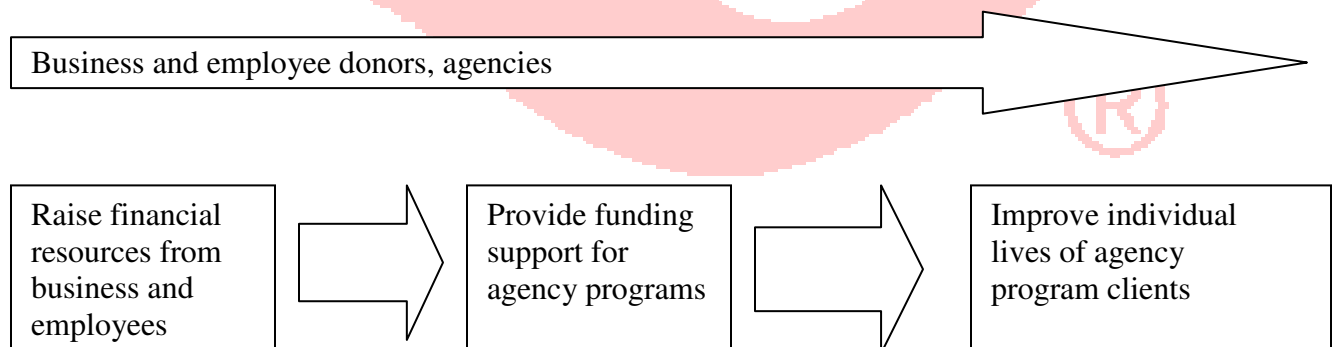
### *How we deliver value today*

Currently, we focus on enabling fundraising, most evident in our major workplace campaigns. Each year we:

- set campaign goals based on workplace fundraising expectations;
- mobilize people and resources in the community to raise the funds;
- through staff and volunteers, assess community investments;
- provide funding for member agencies' support programs that they have developed to address various social needs

While there is an implicit assumption that member agencies are aligned to meet current priority community issues, it is ultimately through member agency perspectives that we bring together volunteers and financial resources. The limitation: member agency input is one of many valid community perspectives (see diagram next page).

This current strategy is mainly reactive and does not engage the community enough toward systemic, lasting change. If we are not fully aware of emerging, systemic community issues, United Way's community impact may be limited, as existing agency capabilities might not be completely responsive to such issues.



### *How we can deliver greater value tomorrow*

We have observed that the most successful United Way campaigns are now run in communities that have made the leap to deal with social change that matters to the community. They are not seen solely as fundraisers for local nonprofit social service organizations. We don't think this correlation is coincidental.

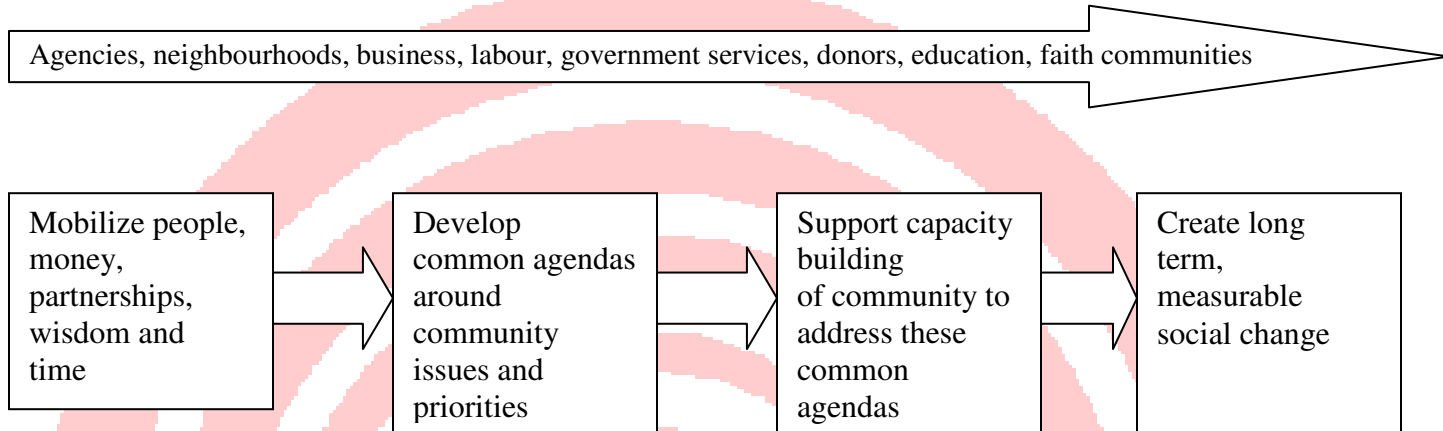
We currently play a vital role in raising and allocating funds to address key social issues. In the future we will become more effective in addressing and preventing the root causes of social issues. To provide more proactive and responsive solutions to systemic community issues, we must take a new approach.

Through various forms of community engagement we will identify the systemic issues of most importance to our community. These are likely to align with our regional priorities, as the priorities were developed using evidence-based community resources. United Way will focus on the role of mobilizing resources to help address each issue appropriately. Starting here creates a greater understanding of the resources (both human and financial) that are needed to find solutions to such broad issues.

### **Outcomes and indicators**

We'll start by setting explicit community impact outcomes for each systemic issue. We'll then establish indicators of success. These outcomes and indicators would then enable community organizations to align their program or initiative outcomes with United Way community impact outcomes. These partners could be agencies or other community based organizations that are able to address the issues. Resources will be mobilized around those partners to support their efforts. Continued funding could occur by virtue of performance and relevance to United Way's community impact outcomes.

United Way's emerging strategy will entail a greater mobilization of resources, including financial resources, to impact social conditions. This will involve working with a broader donor base, including our current business and employee donors, as well as with more community partners, including current agencies (see diagram below).



### **Our strategic role**

In delivering even greater value, United Way of KW & Area will mobilize people and resources in the community to create measurable results in improving people's lives and strengthening our community.

Historically, United Way has been an organization that waited for fundraising results to determine what monies were available, and thus what needs we could meet. United Way is becoming an organization that first identifies what needs are to be addressed, and then what fundraising monies need to be raised.

United Way Canada-Centraide Canada's new Standards of Excellence provide a framework for the aspiration of excellence for this community impact. The components of the Standards of Excellence include:

- Engagement and mobilization of the community
- Planning for impact
- Mobilization of resources
- Excellence in performance
- Leadership and governance

United Way of KW & Area, within this strategic role, will be guided by the underlying principle of striving for operational excellence.

## Strategic outcomes and objectives

To achieve our commitment to measurable, cumulative and lasting change we are committing to the following outcomes and objectives:

1. Develop proactive, collaborative and responsive solutions to systemic community issues supported by desired community impact outcomes.  
Objectives:
  - a. Engage citizens around relevant community issues
  - b. Know the community through a variety of reputable sources (research, input, feedback)
2. Increase strategic alignment of community investments  
Objectives:
  - a. Align partner initiative outcomes with community impact outcomes
  - b. Support capacity building with and of community partners
3. Increase and diversify sources of financial resources  
Objectives:
  - a. Develop and sustain donor relationships
  - b. Raise resources strategically from diverse sources

## Conclusion

The development of this strategic plan was based upon United Way's national transformation into a community impact organization. By 2012, United Way of KW & Area will be a leader in community impact through community solutions, including community fundraising campaigns.