

Advancing the Common Good



2014-2018

Strategic Plan





Mission, Vision and Core Values



Our Mission

The mission of the River Region United Way is to advance the common good by uniting volunteers, donors and community partners to improve the quality of life in the River Region.

Our Vision

We envision a united River Region, creating opportunities for a better life for all.

Core Values

In pursuing our mission, the following principles guide our relationships with stakeholders, including donors, volunteers, partners, employees and the communities we serve.

Integrity: We resolve to maintain the highest standards of personal and organizational honesty in all our activities.

Accountability: We are responsive to our stakeholders, at all levels, and act as good stewards of their investments of time and resources.

Responsibility: We are compelled to advocate for positive social change in the communities we serve.

Leadership: We spearhead efforts to build a better life for all and create a stronger River Region.

Collaboration: We join with individuals, groups and businesses in our communities to work together toward common goals.

Inclusivity: We involve and unite the local community, knowing that respect, diversity and inclusiveness make us stronger.

Commitment: We are devoted to serving individuals and families in our communities in the most efficient and innovative manner.

Intentionality: We strive to deliver relevant services and quality outcomes through thoughtful, deliberate actions.

About the River Region United Way



The River Region United Way (RRUW) advances the common good in Autauga, Elmore, Lowndes, Macon and Montgomery counties by creating opportunities for a better life for all.

We adhere to the philosophy that each of us has a stake not only in the well-being of our own children, but also in the child next door or even down the street. We all have a stake in creating a healthy, prosperous community and improving the quality of life in our River Region.



Our Focus

The River Region United Way works closely with 40+ affiliate agencies and community partners in three key impact areas: Education, Income and Health.

Education: Helping children and youth achieve their potential

Income: Promoting financial stability and independence

Health: Encouraging healthy lifestyles and promoting well-being

We believe everyone deserves opportunities to have a good life: a quality education that leads to a stable job, enough income to support a family through retirement, and good health. That's why United Way's work is focused on the building blocks for a good life.



Our Role

We recruit and mobilize the people and organizations that bring the passion, expertise and resources needed to improve the lives of people in the River Region.

Along with hundreds of volunteers from across our five-county service area, we work together to identify and **assess** the needs in our community, and we recognize that most needs are complex and require multiple solutions. River Region United Way helps our affiliate agencies put in place the tools and programs to address those needs – helping others and changing lives today and tomorrow.

Our highly skilled and dedicated volunteers help **acquire** the necessary resources – both human and financial – to address identified community needs.

They **account** for investments of time and money, ensuring that these resources are being used effectively and efficiently to make a real difference in the lives of others.

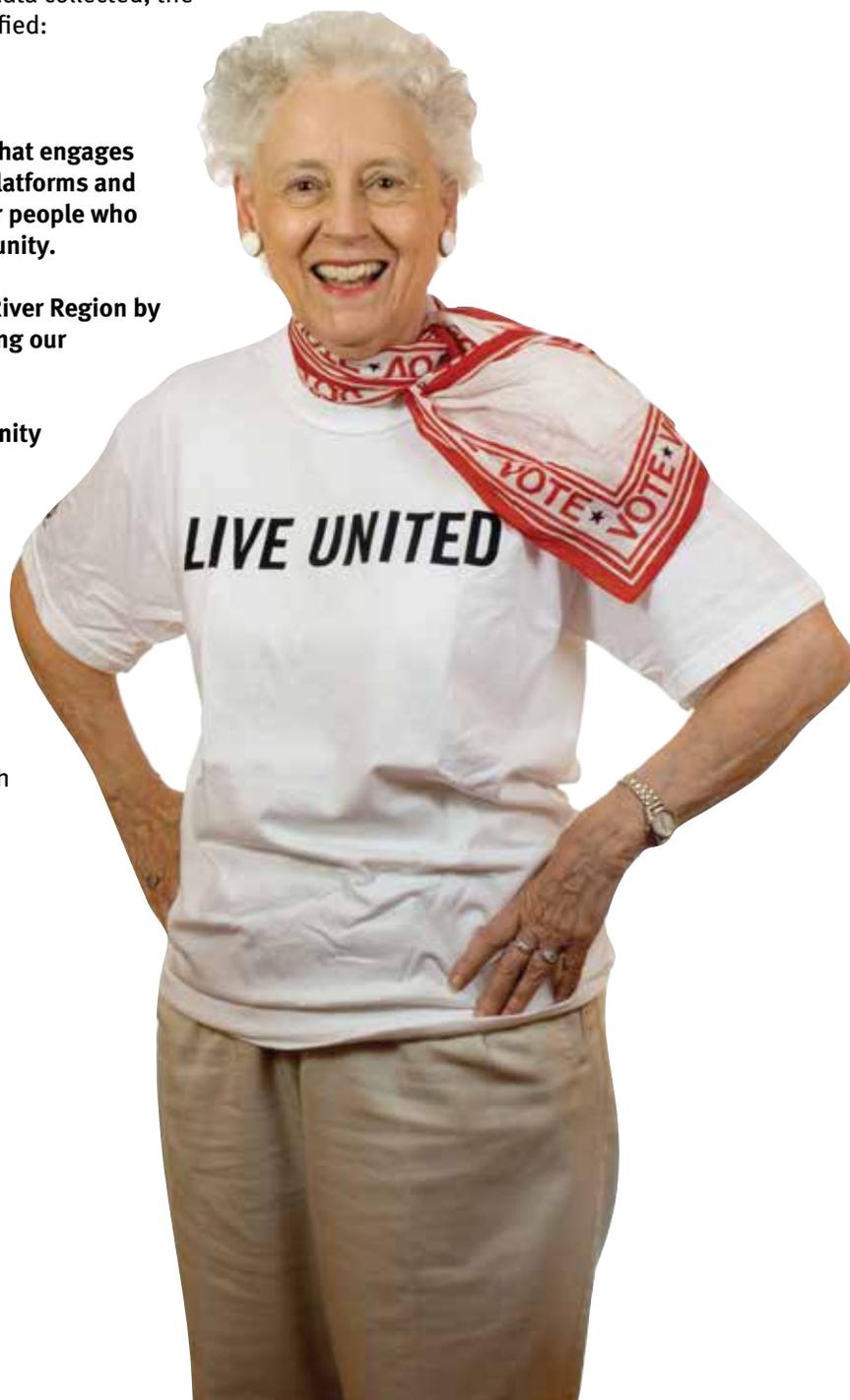
The River Region United Way (RRUW) is committed to creating sustainable, positive community change by addressing the underlying causes of barriers to quality education, financial stability and healthy living.

RRUW's 2014-2018 Strategic Plan is a result of hundreds of hours of input from well over 150 stakeholders representing 15 unique constituency groups. Focus groups were conducted and information was also collected via online surveys and interviews. A Strategic Planning Steering Committee was formed, and upon careful consideration of the input and insights gleaned from the data collected, the following strategic objectives were identified:

Strategic Objectives

- **Deliver a consistent brand experience that engages our community across all constituent platforms and positions RRUW as the ideal partner for people who want to make a difference in our community.**
- **Impact more lives and strengthen our River Region by growing our revenue base and mobilizing our community to give.**
- **Perform as a trusted steward of community resources which focuses on positive impact and lasting results.**

This strategic plan is a flexible, living document that sets our direction for the next five years. RRUW is committed to excellence and accountability for results that bring measurable, lasting change. The following pages detail how we will grow our capacity to create this change through bold, but achievable goals.



Deliver a consistent brand experience that engages our community across all constituent platforms and positions RRUW as the ideal partner for people who want to make a difference in our community.

While brand awareness of United Way is positive, we are not connecting with everyone in the River Region. Our goal in the coming years is to stay relevant and help all constituents more fully understand our work so they can be more active supporters of our mission. This strategy focuses on creating that clarity first internally, and then sharing it externally.

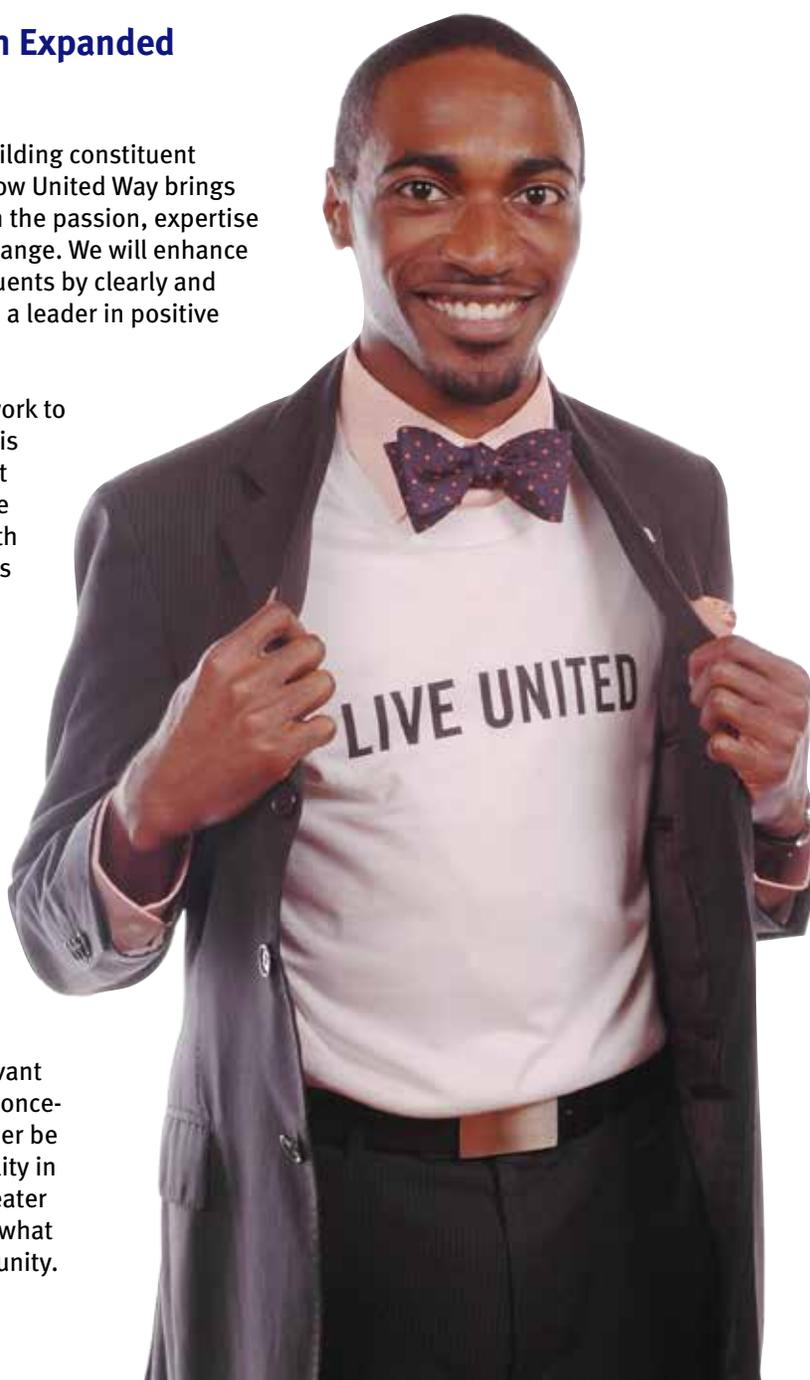
Building Awareness through Expanded Communications

We will support community goals by building constituent awareness and understanding about how United Way brings people and organizations together with the passion, expertise and resources to lead to sustainable change. We will enhance the perception of RRUW among constituents by clearly and consistently communicating our role as a leader in positive community change.

Sharing the compelling stories of our work to improve education, income and health is integral to understanding the value that RRUW brings to our communities. These are the stories of United Way's work with community partners, donors, volunteers and recipients. They are the human faces of what United Way is all about – accomplishments that drive lasting, positive change in the River Region.

Increasing Volunteer and Community Engagement

We will expand ways people interact with us to mobilize and engage individuals to be a part of the positive change and to give, advocate and volunteer. In part, this will be done through the creation and implementation of year-round relevant and compelling messaging rather than once-a-year requests for support. It will further be accomplished through increased visibility in the community by creating new and greater opportunities for people to experience what United Way brings them and the community.



Strategic Objective I.



Strategic Objective	Goals	Strategies
<p>Deliver a consistent brand experience that engages our community across all constituent platforms and positions RRUW as the ideal partner for people who want to make a difference in our community.</p>	<p>Expand all forms of communication to enhance public perception, brand recognition and understanding of RRUW, our work and our impact as the leader in positive community change.</p>	<ul style="list-style-type: none">• Develop a Comprehensive Case for Support• Develop consistent RRUW messaging and branded materials for all internal and external audiences• Develop a Social Media Communications Strategy that not only informs but also engages and encourages individuals to Give, Advocate and Volunteer• Develop, execute and evaluate a Comprehensive Media Plan• Expand the capacity of the RRUW Marketing & Communications team to provide year-round focus on communications with donors and volunteers, as well as expanded social media efforts• Create an RRUW Ambassadors program or Speakers Bureau to help share our United Way story
	<p>Be a leader in community and volunteer engagement.</p>	<ul style="list-style-type: none">• Improve the placement of RRUW volunteers by matching volunteer skill sets and interests with volunteer placement opportunities• Provide a comprehensive volunteer orientation for every RRUW volunteer• Provide year-round opportunities for meaningful volunteer and community engagement by offering or participating in community-wide events (i.e. MLK Day of Service, United Way Day of Action, 9/11 Day of Service)• Implement volunteer recognition and appreciation initiatives• Engage new volunteers and expand opportunities for volunteer and donor involvement through “affinity groups” (Women’s Initiatives, Young Professionals, Youth Groups, Retirees, etc.)
	<p>Strengthen our relationships with existing donors by adding value and relevancy.</p>	<ul style="list-style-type: none">• Provide communication and training internally at RRUW to create a shift in the culture from transaction-oriented to relationship-focused in the way RRUW operates and interacts with both its internal and external constituents• Communicate regularly with donors throughout the year to provide information and updates and maintain relationships• Strengthen relationships with businesses and connect with executive leadership at companies engaged in workplace giving campaigns• Develop personalized communication strategies for connecting with donors and donor groups• Explore cause-related marketing opportunities through potential partnerships with local and regional companies

Strategic Objective II.



Impact more lives and strengthen our River Region by growing our revenue base and mobilizing our community to give.

The River Region United Way seeks to pursue innovative approaches and refine existing ones to grow relationships with both current and prospective donors, inside and outside the workplace, resulting in both increased donations and donor retention levels.

Expanding the Donor Base to Serve More People

Our Leadership Giving Societies, specifically our Tocqueville Society, have seen a significant increase in membership, helping to offset decreases in other areas of our annual fundraising campaign. Our strategic approach focuses on maintaining and growing relationships with our leadership donors while at the same time, identifying ways to increase retention rates among all donors and recognize new revenue from untapped channels, such as corporate sponsorships.

Addressing Gaps in Community Services

An Impact Fund will be created and maintained for the purpose of addressing identified gaps in community programs and services. Drawing on the results reported from RRUW's 2013 Community Needs Assessment, as well as other community needs assessments conducted in the River Region, we will monitor and report to the community specific, measurable outcomes that demonstrate success.

Securing Grant Funding for Greater Impact

Our goal is to establish a comprehensive process to secure grant funding for the purpose of addressing community needs. Our extensive research and understanding of potential grant funders will allow us to position ourselves as the organization of choice for results-oriented action in the health and human services arena within the River Region.

Growing the Endowment for Future Needs

River Region United Way will grow its endowment by undertaking a comprehensive effort to develop a planned giving program, to include strategies for identifying, cultivating, soliciting and recognizing planned giving donors. While integrated with current fundraising efforts, this separate approach will address the central tenet of our work by demonstrating to planned giving donors and prospects our long-term focus to improve the lives of people across our community.



Strategic Objective II.



Strategic Objective	Goals	Strategies
Impact more lives and strengthen our River Region by growing our revenue base and mobilizing our community to give.	Expand the annual campaign donor base and increase total revenue.	<ul style="list-style-type: none">• Implement a year-round relationship management strategy with all donors• Broaden our base of community support by growing the number of workplace giving campaigns• Grow and retain the number of Leadership Givers• Develop and implement a comprehensive corporate sponsorship program
	Develop and maintain an Impact Fund for addressing identified gaps and unmet needs in the community.	<ul style="list-style-type: none">• Create a pool of funds to address unmet community needs• Develop procedures for the implementation of an Impact Fund (application process, etc.)• Develop messaging around the purpose of the Impact Fund• Conduct annual evaluation of the Impact Fund, including successes, impact and challenges• Communicate the results/impact made as a result of this funding
	Establish a comprehensive process to identify and secure grant funds to address community needs.	<ul style="list-style-type: none">• Develop a Case Statement/Case for Support• Clarify community needs to be addressed and then identify prospective grant funding sources that could be a match• Improve processes for developing/drafting grant proposals• Improve processes for administering funded grant proposals, reporting results, etc.
	Grow the endowment in total value and stabilization.	<ul style="list-style-type: none">• Develop a comprehensive planned giving program• Develop strategies to identify, cultivate, solicit and recognize planned giving donors• Identify long-term community goals• Develop and implement a communications plan to educate prospective donors on our long-term community goals

Strategic Objective III.

Perform as a trusted steward of community resources which focuses on positive impact and lasting results.

River Region United Way seeks continuous improvement in community investments by regularly reviewing, revising and enhancing our current practices to maximize our impact.

Striving to be the recognized leader in community services, the River Region United Way seeks to closely align its guidelines and processes for allocating funds directly with community and agency needs. RRUW recognizes the importance of demonstrating donor impact and is committed to providing its stakeholders with reported outcomes from the programs and services provided by its affiliate agencies.

Strategic Objective	Goals	Strategies
Perform as a trusted steward of community resources which focuses on positive impact and lasting results.	Align our funding process to produce the greatest impact in the community.	<ul style="list-style-type: none">• Clearly define expectations on funding applications and reporting of demonstrated outcomes• Develop a program to strengthen and support the leadership of affiliate agencies by providing networking opportunities and offering special training
	Simplify reports produced to clearly communicate performance tracking related to financial information and Community Impact outcomes.	<ul style="list-style-type: none">• Improve and enhance the presentation of financial information provided to the RRUW Board of Directors, Committees and other stakeholders



After 90 years of service to our communities, United Way is among the most trusted and respected charitable organizations in the River Region. We have been entrusted with both the opportunity and the responsibility to provide the communities we serve with the leadership necessary to change lives and improve community conditions. In short, the 2014-2018 Strategic Plan is designed with a single vision: a united River Region, creating opportunities for a better life for all.

Moving forward, our work begins with a clear and unified understanding that our mission is to advance the common good by uniting volunteers, donors and community partners to improve the quality of life in the River Region. We are confident that our vision, mission, core values and strategic direction will help us remain focused and diligent in addressing the most pressing and challenging needs in our communities.

While this document sets our direction for the next five years, we will monitor progress and results annually, making the necessary adjustments to remain on track to meet our strategic community goals. River Region United Way is committed to excellence and insistence on accountability for results that bring measurable, lasting change.

Only through increasing levels of awareness and understanding of the value United Way brings, can we deepen engagement among various constituents across the River Region. Delivering upon this strategic plan will require focus, commitment, responsibility and energy from the entire community. Working together, we can achieve the sustainable community change that we all desire and truly LIVE UNITED.

GIVE. ADVOCATE. VOLUNTEER.
LIVE UNITED



**River Region United Way
proudly serving**



**Autauga County
Elmore County
Lowndes County
Macon County
Montgomery County**

LIVE UNITED

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