



**UNITED WAY OF JACKSON
COUNTY --
STRATEGIC ROADMAP 2022-2025**

United Way of Jackson County -- Strategic Roadmap 2022-2025

- Work began in 2019 once the new building was in place and it was time to grow.
- Stopped the work due to COVID and the fires.
- Reconvened in January 2021, met monthly.
- Goal was to craft a new roadmap for the next 3 years.
- Review committees, bylaws, values, belief statement and more.
- Process to provide alignment with our values, our strategic pillars and our desired target.
- Members included chair, Chris DuBose, Becky Snyder, Bret Champion, Dan Thorndike, Don Kania, Steve Erb, Sue Slack. Staff included Anna Barnsley Werblow and Dee Anne Everson.

United Way of Jackson County *Strategic Roadmap 2022-2025*

UWJC Vision: Creating positive community change

UWJC Mission: Mobilizing caring to affect change

CORE VALUES

Community: We bring together our diverse population to uncover problems and deliver solutions to the challenges impacting the health and well-being of all of us.

Compassion: We offer opportunity, encouragement and inspiration within our community to care for one another.

Empowerment: We provide the ability to grow, collaborate and transform for individuals, organizations and communities.

Vision: We help people fulfill their potential and improve lives in our community by informing, advocating, convening and facilitating human services.

Integrity: We are honest and trustworthy providing clarity, consistency and strength in our mission.

Inclusion: We promote diversity, equity and inclusion (DEI) in our committees, councils, Board and staff. We develop leaders who are educated and aware of DEI. We work to ensure our policies, actions and procedures honor DEI.

STRATEGIC PILLARS

Everyone completes high school – measured by graduation

Everyone is housed – measured by PIT count (Homeless Point in Time) and 80% median income

Everyone has good health – measured by child abuse, drug/alcohol, suicide rate

Everyone has a foundation for a secure future – measured by ALICE, poverty, EITC, transportation

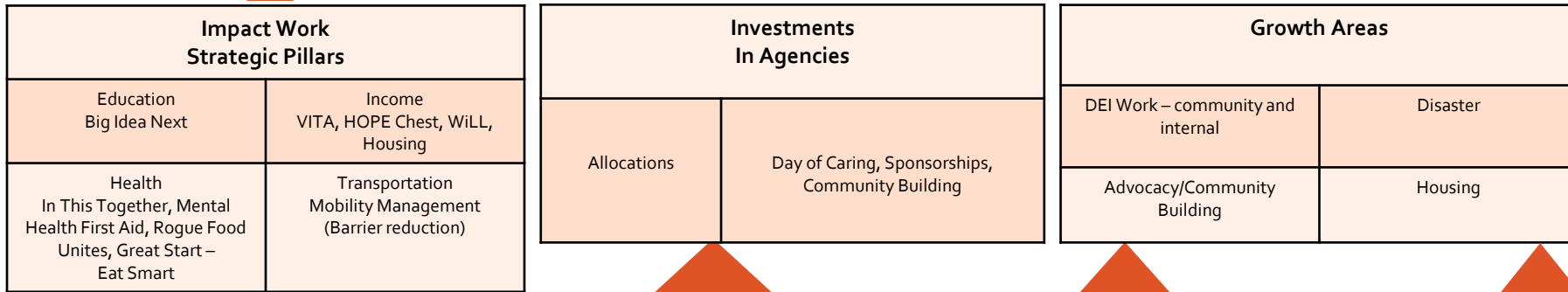
Everyone participates actively in community – measured by Giving in Oregon study, volunteerism, voter registration/voting

Our Mission: mobilizing caring to affect change

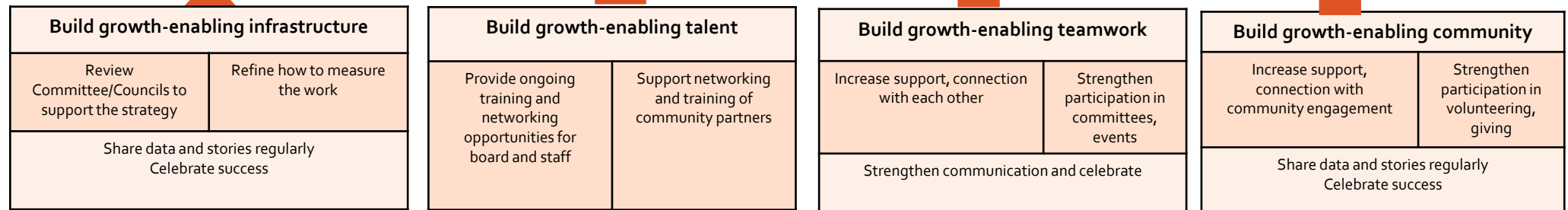
CUSTOMER

Jackson County and surrounding areas for individuals and families in need and people who can help.

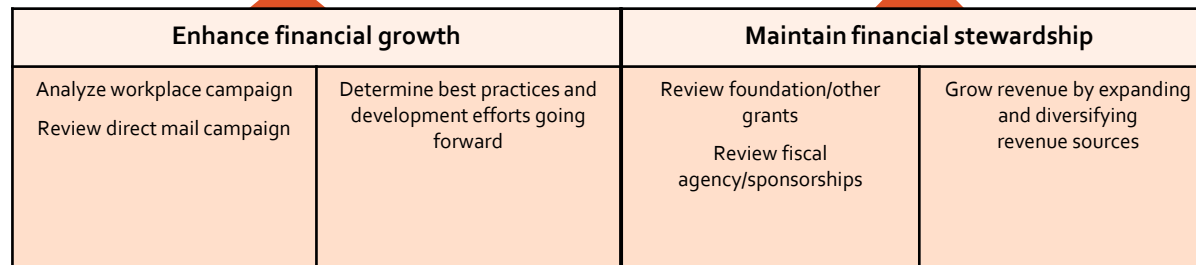
Impact Agenda



Internal



Financial Security



Our Belief Statement

At its core, United Way of Jackson County believes people are connected and interdependent. When we reach out a hand to one, we influence the condition of all. We all win when children form healthy attachments through a loving family, when they succeed in school, graduate and make successful transitions to adult responsibilities. We all win when families are financially stable, when people have good health, when people have a place to live, and when people are engaged and connected. We all win when people have access to transportation to pursue education, access to medical services and work.

Through our role as convenor, facilitator and advocate, our goal is to create long-lasting change by addressing the underlying causes of problems. We believe in agility, flexibility and partnership to take advantage of opportunities and respond to our community.

Our Equity Statement

United Way fights for the education, income, health, housing, and transportation of every person in our community.

We take the broadest possible view of diversity as we continue to learn and be inclusive.

We value the visible and invisible qualities that make you who you are.

We welcome that every person brings a unique perspective and experience to advance our mission and progress our fight for the education, income, health, housing, and transportation of every person in our community.

We believe that each United Way partner, donor, volunteer, advocate, employee, and person served must have equal access to solving community problems.

We strive to include diversity, equity, and inclusion practices at the center of our daily work.

We commit to using these practices for our business, our communities, and our relationships. Join us in embracing diversity, equity and inclusion for every person and every family in our community.

Key Questions to Guide Us

- Does it make us more effective and efficient?
- Does it help us make decisions aligned with our values?
- What are the right committees to support the work?
- What activities and structures can we do away with to focus on our vision?

Guiding Principles

- Agility to be effective in a dynamic world
- Moving families and communities forward
- Willingness to do right thing, right time, right resource

Internal Strategy – Grow!

Resources

- Annual campaign
 - Use analytic tools to gain insight into growth opportunities
 - Workplace – number of campaigns, donors, lost campaigns, average gift
 - Direct mail – gig workers, freelancers, retirees, small business, average gift
 - Foundations – grant reviews by impact area, on mission?
- Expand funding sources
- Board/Committee engagement – attendance, giving, succession
- Capital campaign

Branding

- Website
- Social media – Facebook, Instagram, Twitter
- Community Impact
- Public awareness

Internal Strategy – Grow! continued

Staffing

- Right size, right people, right jobs
- Succession

Technology

- Remote work, flexible scheduling
- Infrastructure plan
- Cyber security
- Computer and network infrastructure
- Telecom system
- Software

Internal Strategy – Grow! continued

Physical Plant

- Building fund
- Physical security
- Configuration/use of space
- Environmental sustainability

Committee/Council Review

- Consider alignment to ensure proper committees/councils to support the work
- Required in bylaws – Executive and Nominating
- All board members must serve on one committee/council.
- Where does disaster work belong? How do we manage it?
- Housing
- Data analytics
- Review by-laws (completed review 10/21)

Committees, Councils, Task Forces 2021

Committees

- Administrative
 - Executive
 - Finance & Investment
 - Nominating
 - Personnel
 - Audit
- Fundraising
 - Campaign
 - Fire Fund
 - Capital
- Impact
 - Big Idea Next
 - Day of Caring
 - Public Policy
 - Transportation Impact

Councils

- Community Building
- DEI (Diversity, Equity and Inclusion)
- WiLL (Women Living Leadership)

Task Forces

- Strategic Roadmap

Committees, Councils, Task Forces Proposed

Committees

- Administrative
 - Executive
 - Audit
 - Finance & Investment
 - Nominating & Governance
 - Personnel
 - Ad Hoc Task Forces
- Fundraising
 - Campaign
 - Disaster
 - Impact Projects
 - WiLL
 - Capital
 - Grantwriter/Analytics

Councils

- DEI (Diversity, Equity and Inclusion)
- WiLL (Women Living Leadership)

Impact Projects

- Big Idea Next
- Day of Caring
- Public Policy
- Transportation Impact
- Disaster
- Secure Futures
- Maximizing Wellness

Strategic Pillars

-- Committee/Council Alignment

Education –
Everyone
completes high
school

- Big Idea Next Task Force

Everyone has a
foundation for a
secure future.
Income – Everyone
is housed.

- Secure Futures
- Disaster – Response and Preparedness

Health – Everyone
has good health.

- Maximizing Wellness

Strategic Pillars

-- Committee/Council Alignment

Transportation –
Removing
barriers.

- Transportation Impact

Community –
Everyone
participates
actively in
community..

- Day of Caring
- Public Policy

Councils – cover
internal and
external issues or
cross over pillars

- DEI (Diversity, Equity and Inclusion)
- WiLL (Women Living Leadership)

Strategic Pillars

-- Committee/Council Alignment

Administration
(mission) –
Mobilizing
caring to affect
change

- Executive
- Audit
- Finance & Investment
- Nominating & Governance
- Personnel
- Ad Hoc Task Forces

Fundraising –
Money for the
mission

- Annual Campaign
- Disaster
- Impact Projects
- WiLL
- Capital
- Grantwriter/Analytics

**QUESTIONS,
COMMENTS,
FEEDBACK....**

Thank You!