

UNITED WAY OF SOUTH CENTRAL OKLAHOMA

Strategic Plan

March 2020-2022

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TABLE OF CONTENTS:

I.	Executive Summary	3
II.	About United Way of South Central Oklahoma	4
III.	Strategic Advantages	4
IV.	Vision	5
V.	Mission	5
VI.	Values	5-6
VII.	Assumptions	6
VIII.	Critical Success Factors	7
IX.	Goals and Objectives	8

Executive Summary

This document offers an overview of the United Way of South Central Oklahoma's (UWoSCO) 2020-2022's strategic planning process and is designed to build a bridge from the organization's past accomplishments to its future desires. This process was facilitated and carried out by the UWoSCO Board of Directors and Staff.

The planning process began with gathering input from key stakeholders to help the board make more informed decisions, which formally ended with a 1 day Board retreat. This plan is not meant to be static, and its written goals and objectives will continue to be updated and modified based upon the evolving landscape of the nonprofit sector, capacity of UWoSCO, needs of the community, and input received from stakeholders.

Through a Self-Assessment Report and conversation with stakeholders of every type within in our five county regions, we aim to be the force that pulls together the needs of our community into a comprehensive response which will effect long-term positive change.

About the United Way of South Central Oklahoma

In an effort to improve the quality of life of families and the communities of South Central Oklahoma, the organization focuses on:

- ❖ **Education** – helping children and youth achieve their potential
- ❖ **Financial Stability** – promoting financial stability and independence
- ❖ **Health** – committed to improving health in the communities served.

Overseen by a Board of Directors, UWOSCO runs independently of other United Way organizations. This autonomy offers the Board of Directors the opportunity to provide proactive policy making that is both receptive and responsive to local needs, and a reflection of the priorities and core values of South Central Oklahoma residents.

Strategic Advantages

Strategic planning offers a vital opportunity to evaluate where we are and chart a course for the future. This Strategic Plan will guide us in our decision making of allocating resources to accomplish the identified goals, strategies, and objectives best suited to meet the needs of the residents of South Central Oklahoma.

Vision

A community of healthy, educated and financially secure individuals.

Mission

The Mission of the United Way of South Central Oklahoma is to improve lives and enhance the community by mobilizing the caring power of the people of Southern Oklahoma

Values

Integrity:

We act with integrity that inspires the highest truth. We therefore:

- Stand as “one” in the relentless pursuit of instilling and promoting public confidence and trust.
- Maintain the highest standards of excellence and accountability, including prudent use of finances, and fair, accurate and honest disclosures of information.
- Keep our promises. People know that “United Way makes my caring count.”

Impact:

We make a positive difference and have a measurable impact of enduring consequence. We therefore:

- Make a difference in our community and change lives through our efforts.
- Are committed to a United Way that is relevant to its people, its community and the times.
- Assume responsibility as good stewards and are accountable for our work and sustainable results.

Volunteerism:

We have impact and are made relevant through the spirit of volunteerism. We therefore:

- Are outstanding in the way that we invite volunteers to express their philanthropic beliefs (expression of one’s “love of humanity”).
- Believe that the most effective models of service and excellence are created through the leadership of volunteers.
- Encourage volunteer participation.

Inclusiveness:

We are strong only when we are inclusive. We therefore:

- Aspire to involve every segment of the community in every aspect of our work.

- Act in ways that respect the dignity, uniqueness, and intrinsic worth of every person, the community, the donors, our own Board members, staff, volunteers and representatives.
- Believe in a movement built from the rich diversity and gifts of all people in all systems.

Community Leadership:

We provide leadership for community building to be a catalyst for positive change. We therefore:

- Are effective educators and facilitators bringing all segments of the community together to promote individual well-being and common good.
- Are leaders of a process that multiplies the impact of people's innate desire and capacity to care for one another.
- Help transform visions of compassion and giving into dynamic reality.

Assumptions

During the planning process staff acknowledged, documented, and at times, verified the underlying assumptions that this plan is built upon. Assumptions are always at the foundation of any strategic plan, though they are often omitted or neglected. In the effort of transparency, the assumptions are documented below:

We Assume

1. An increase in community awareness will create trust, understanding and accountability.
2. We will be met with enthusiastic cooperation from the stakeholders of South Central Oklahoma.
3. The majority of South Central Oklahoma's non-profits, faith-based organizations, Universities, businesses, local government etc. will welcome mutually beneficial partnerships.

We shall not Assume

1. The Board and staff understand the challenges facing South Central Oklahoma.
2. Current donors and the community at large know the value of our work and its impact on the community.
3. We will not experience any decrease in future funding that will impact ne goals.

Critical Success Factors

The strategic plan requires more than goals and objectives; there are often intangibles that contribute to the success of the plan. These are known as critical success factors. The achievement of goals, objectives, and the mission of this plan rely on the following:

The United Way of South Central Oklahoma will:

1. Remain fully active and closely engaged in creating and executing the plan.
2. Respect the opinions, ideas and input of each other.
3. Not act independently or make decisions for personal gain or agenda.
4. Act as a unit and stand behind decisions made as such.
5. Focus on and stay committed to the mission, vision and values.
6. Consider the impact to the communities of South Central Oklahoma in making decisions.
7. Create an action plan with foreseeable goals that will greatly influence community awareness.
8. Foster an environment that gives rise to trust, ensuring that our credibility and character continues to promote the community's confidence in our capabilities.
9. Use this strategic plan as a road map to move forward.
10. Confirm clear roles and responsibilities for the continuous communication and execution of the final plan.

Goals and Objectives

Goal 1: Establish Business Model Based Upon Desired Community Impact

Goal 2: Improve Governance Capacity and Organizational Infrastructure

Goal 3: Increase Community Involvement and Engagement

Goal 1: Establish Business Model Based Upon Desired Community Impact				
<u>Objectives</u>	Desired Output(s) (Quantitative Achievement, i.e., # participants, # visits, tangible deliverable)	Desired Outcome(s) (Qualitative changes over time, i.e. Changes in behavior, conditions, attitude, increase in skill/knowledge)	Responsible Party	Due by
1.1: Conduct business as a donor centric business model.	Build multiple pathways engage donors and market segments.	Deeper, more personal connections to our donor base.	ED and BOD	2022
1.2: Explore & develop future business models to support desired impact.	Clear investment priorities and plans. Allocation policy with specific funding expectations.	Increased opportunity for sustainability. Better decision making when allocating resources.	ED and BOD	2022
1.3: Assess organization capacity.	Assessment of organizational capacity. Priorities/impact established based upon our capacity.	Future direction decided. Clear direction and priorities.	ED, Strategic Planning Committee and BOD	2021

Goal 2: Improve Governance Capacity & Organizational Infrastructure				
<u>Objectives</u>	Desired Output(s) (Quantitative Achievement, i.e., # participants, # visits, tangible deliverable)	Desired Outcome(s) (Qualitative changes over time, i.e. Changes in behavior, conditions, attitude, increase in skill/knowledge)	Responsible Party	Due by

2.1: Amend the current by-laws and Policy Manual to reflect any needed modifications.	Review and approve set of by-laws. Review and approve all updates and additions of new and modified policies.	A future governing guide for decision making and direction.	ED, Strategic Planning Committee and BOD	2022
2.2: Identify and recruit board members focusing on diversity to guarantee the community at-large and clients are adequately represented.	During BOD rotations cultural components and diversity will be made a high priority during selection process.	Clear direction and priorities for a diversity of thought and a diverse representative of shareholders.	ED and BOD	Annual
2.3: Institute a board profile to ensure board members have the skills, talents, and connections relevant to the needs of the organization.	Include Officers job descriptions in addition to the Board of Directors job description within Policy Manual and BOD orientation packets.	Clear understanding regarding what is expected of each Officer regarding job duties involved with organization.	ED	Annual

Goal 3: Increase Community Involvement & Engagement				
<u>Objectives</u>	Desired Output(s) (Quantitative Achievement, i.e., # participants, # visits, tangible deliverable)	Desired Outcome(s) (Qualitative changes over time, i.e. Changes in behavior, conditions, attitude, increase in skill/knowledge)	Responsible Party	Due by
3.1: Develop a comprehensive outreach plan.	Describe a specific message to communicate between us and the public by means of social media, web, word	Increase community engagement and presence.	ED and Marketing Committee	Annual

	of mouth, media, etc.			
3.2: Increase participation at key community events.	ED is expected to be present at community events. BOD, and agency partners are encouraged to be present at community events.	Creates ways in which to disseminate information and deliver messages. Increased community engagement and presence.	ED and BOD	Annual
3.3: Initiate a social media campaign.	Build social media based campaigns involving FB, Twitter, and Instagram.	Increase millennial awareness/giving.	ED	Annual
3.4: Develop informational marketing material.	Describe organization through marketing materials. (Not partner agencies)	Increase awareness about organization and availability of services.	ED and Marketing Committee	2021