



**United Way**  
Guelph Wellington  
Dufferin

# OUR WAY FORWARD TO 2022

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## STRATEGIC DIRECTIONS REFERENCE PACKAGE



**United Way Guelph Wellington Dufferin  
hired Openly to facilitate the development of  
a new Strategic Plan in early 2019.**

This plan builds from the development of a new operational business model, itself a response to trends identified through key informant interviews, a sector environmental scan, and the facilitation of two community impact strategies.

United Way convened a Strategic Planning team of Senior Volunteers, Board Members, Agency Leaders, and Staff. This team worked through a series of strategic planning workshops to assess and reflect upon stakeholder input, sector trends, and their experiences with United Way's work, to develop United Way's Strategic Plan.

This document is a reference package that compiles the sources of information that the Strategic Planning Team used in their work.

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## United Way Guelph Wellington Dufferin, Strategic Planning, Key Informant Themes

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January, 2019

In 2018, United Way Guelph Wellington Dufferin began a Community Impact Strategy project, defining two integrated strategies: first, United Way's external approach to bringing together community partners to build collective plans to address community issues, and second, United Way's internal business model for engaging and mobilizing community stakeholders in a shared responsibility for local community.

United Way acknowledges that the ways in which people like to connect with a charity, and make a difference in their community, are changing and that United Way must adapt as well. As such, early in the process, United Way asked a diverse range of trusted stakeholders to share their insights for the future. They suggested that United Way transform and adapt to:

- boldly educate and engage stakeholders, year-round, in a shared responsibility or purpose to help the local community,
- build individual, two-way relationships with donors, unique to the preferences of key donor groups, such as baby-boomers, gen-x, and millennial generations, and
- act as a leader to coordinate specific plans and achieve specific results on a handful of key issues.

Insights from these key informants have been utilized by United Way's senior staff to adapt United Way's business model to remain relevant and responsive to stakeholder and community needs (insights are summarized in the first section below).

Adapting to sufficiently activate a new business model will require United Way to adjust some practices, and transform others. In early 2019, United Way again turned to an additional set of trusted stakeholders to provide further key informant insight on the recommendations it received earlier in 2018. This feedback forms most of this report.

### Key Informant Highlights – Insights on United Way's Business Model

#### Purpose and Highest Potential

There was significant alignment among stakeholders regarding the perceived purpose and highest potential of United Way's work and mission. In addition to traditional strategies, such as using United Way's understanding of community needs to fundraise and provide local agencies with resources to create change, stakeholders suggest that United Way's highest purpose and potential is in:

- supporting the community to become stronger and more resilient, based on a shared belief in the responsibility to help local community.

## Adapting in a Changing Sector

Carrying-out the above purpose will require change. Key informants identified ways in which the charitable sector is changing, and considerations for United Way to adapt:

Trend	Adaptive Response
Demographics, industries and employment, and giving preferences are shifting, requiring adaptation to engagement strategies: <ul style="list-style-type: none"><li>→ long-time donors are retiring, manufacturers are leaving the community, and millennial workers are more precarious and less willing to do payroll donation,</li><li>→ donors want to see direct, personal connections between their contribution and its impact in the community,</li><li>→ third-party (workplace) relationships with donors are fragile</li></ul>	<ul style="list-style-type: none"><li>→ cultivate individual-level communications and relationships with all donors, especially millennials and retirees</li><li>→ champion new ways of working together to achieve greater community impact</li><li>→ avoid a single approach; move to the forefront of new ways to give</li><li>→ identify community issues and convene stakeholders to address them together</li></ul>
Fundraising competition is increasing: <ul style="list-style-type: none"><li>→ in United Way's traditional umbrella role (e.g. community foundation), and</li><li>→ new ways to give have emerged (e.g. crowdfunding), creating more donor options</li></ul>	<ul style="list-style-type: none"><li>→ think more boldly and creatively about UWGWD's role</li><li>→ be consistently active in the community all year round</li><li>→ educate community, stakeholders, and donors about United Way's potential</li></ul>
United Way struggles to demonstrate its relevance: <ul style="list-style-type: none"><li>→ United Way fades into the background much of the year, and</li><li>→ United Way's value is vague due to its pooled approach (donors are divided on this)</li></ul>	<ul style="list-style-type: none"><li>→ make United Way's mission visible</li><li>→ achieve and demonstrate impact on specific issues</li><li>→ tell compelling, tangible stories</li></ul>

## Reaching UWGWD's Highest Potential

Taking these considerations together, stakeholders suggest that achieving United Way's highest potential will include:

- boldly educating and engaging stakeholders year-round, in a shared responsibility or purpose to help the local community,
- building individual, two-way relationships with donors, unique to the preferences of key donor groups, to increase fundraising and other support, and
- acting as a leader to coordinate specific plans and achieve results to move the needle on core social issues.

## Key Informant Input – Insights for United Way’s Strategic Plan

As United Way considers a new Business Model, it is actively planning what it will take to implement that model through a Strategic Plan that will drive strategy for the next 24-36 months. United Way turned to trusted stakeholders to seek their input on:

- the strategies, suggested by other key stakeholders, to sufficiently implement a new business model and initial factors to keep in mind, and
- necessary areas to build capacity, and the results that would justify that capacity.

### Suggested Strategies

As noted, Key Informants, in 2018, suggested that United Way move forward:

- boldly educating and engaging stakeholders year-round, in a shared responsibility or purpose to help the local community,
- building individual, two-way relationships with donors, unique to the preferences of key donor groups, to increase fundraising and other support, and
- acting as a leader and coordinate specific plans and achieve results to move the needle on core social issues.

Stakeholders, in 2019, were invited to respond to these strategies, and reflected as follows:

Suggested Strategy	Key Informant: Support and Benefits	Key Informant: Influencing Factors
Boldly educate and engage stakeholders, year-round, in a shared responsibility or purpose to help the local community	<ul style="list-style-type: none"> <li>→ All stakeholders suggested that this was an important priority, and perhaps actually a key mandate of United Way.</li> <li>→ Year-round community presence gives credibility to United Way’s leadership role:               <ul style="list-style-type: none"> <li>→ It helps people make connections between their contributions and the leadership those contributions make possible;</li> <li>→ It may help United Way escape the “fall fundraiser” image and enable it to engage people in issue leadership year-round.</li> </ul> </li> </ul>	<p>In playing this role, stakeholders suggest that it is important that:</p> <ul style="list-style-type: none"> <li>→ United Way consider new approaches, such as public education about issues, and supporting the grassroots of community to get involved,</li> <li>→ United Way continually tell the story of networks of agencies working, with donor support, to make a difference, putting faces on the issues, and work,</li> <li>→ United Way engage with volunteerism and grow the base, promoting the opportunity to support social change as volunteers</li> </ul>
Act as a leader to coordinate specific plans and achieve results on key issues	<ul style="list-style-type: none"> <li>→ Stakeholders agree that issue leadership, identifying emerging issues and linking them to opportunities to invest in community, is a key role for United Way to provide value to community.</li> </ul>	<p>In seeking to play this role, stakeholders suggest that it is important that:</p> <ul style="list-style-type: none"> <li>→ United Way seek to identify and improve structural barriers between stakeholders (e.g. turf, funding policies,</li> </ul>

	<ul style="list-style-type: none"> <li>→ United Way is seen as a third-party that is well positioned to act as a convenor to bring community members and interested parties together to respond to issues collectively.</li> </ul>	<p>service practices) that can be barriers to collaboration,</p> <ul style="list-style-type: none"> <li>→ United Way seek to convene around issues that are perceived as critical, that can motivate stakeholders to act,</li> <li>→ Addressing emergent or surging social issues may require a shift in stance and approach, not using only traditional funding approaches</li> </ul>
Build individual, two-way relationships with donors, unique to the preferences of key donor groups, such as baby-boomers, gen-x, and millennial generations	<ul style="list-style-type: none"> <li>→ Stakeholders support this strategy, noting its essential foundational role in supporting the other strategies and work of United Way.</li> <li>→ Continuous, individual relationships are important to United Way's ability to:               <ul style="list-style-type: none"> <li>→ Balance the interests of direct supporters (e.g. donors) and the broad community, and</li> <li>→ Understand segments of existing and potential supporters to grow existing and new commitment</li> </ul> </li> </ul>	<p>For individual relationships, stakeholders suggest:</p> <ul style="list-style-type: none"> <li>→ United Way build dedicated channels to communicate with supporters individually, and directly, rather than solely through intermediaries, and</li> <li>→ United Way seek to continuously assess and understand the participation and giving interests of each supporter, in order to group them with like-minded supporters for engagement, and report-back immediate and meaningful results.</li> </ul>

Stakeholders are supportive of United Way evolving, adopting new strategies to remain current, and emphasize its critical role in strengthening the network of agencies and services to benefit the community.

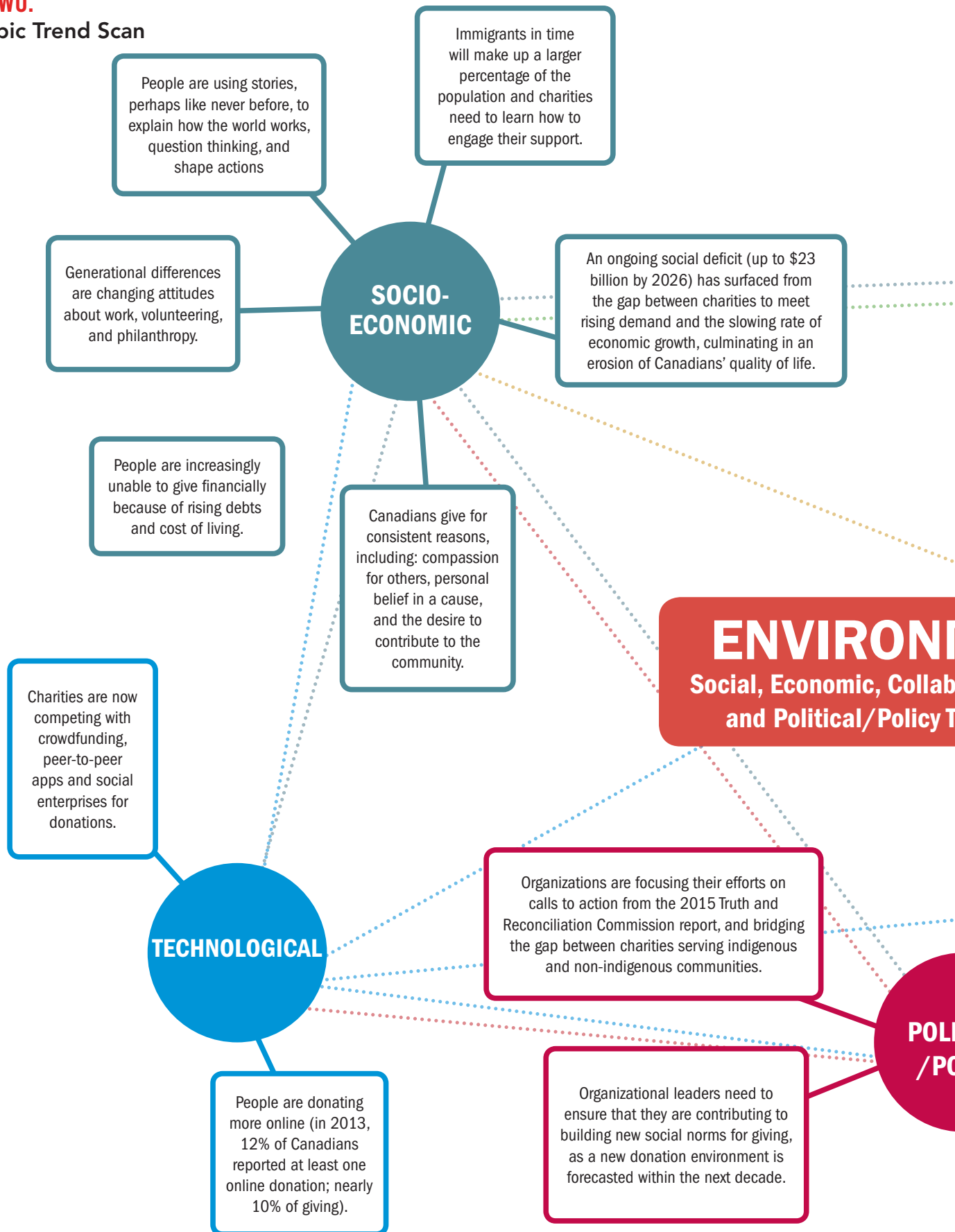
## Building Capacity

Stakeholders proposed that attaining UWGWD's strategic goals will require the organization to build capacities, and suggest this likely includes:

- human resources, with training on the new work, to fully leverage new opportunities,
- relationship building – direct, and individual, with donors, community leaders, and community agencies, emphasizing agency relations, diversification of fundraising, and expanded communications, and
- technology – for internal operations, fundraising, and communications,
- all to ultimately, increase and effectively use resources in community impact work, with partnering agencies, to achieve new community impact.

Stakeholders acknowledge that United Way is known for having low administrative costs, and that new investments in capacity are also required. They suggest that new resources are required to be bold and proactive, and that it will be essential to measure results and show real community benefit for the investment.

## APPENDIX TWO: Philanthropic Trend Scan

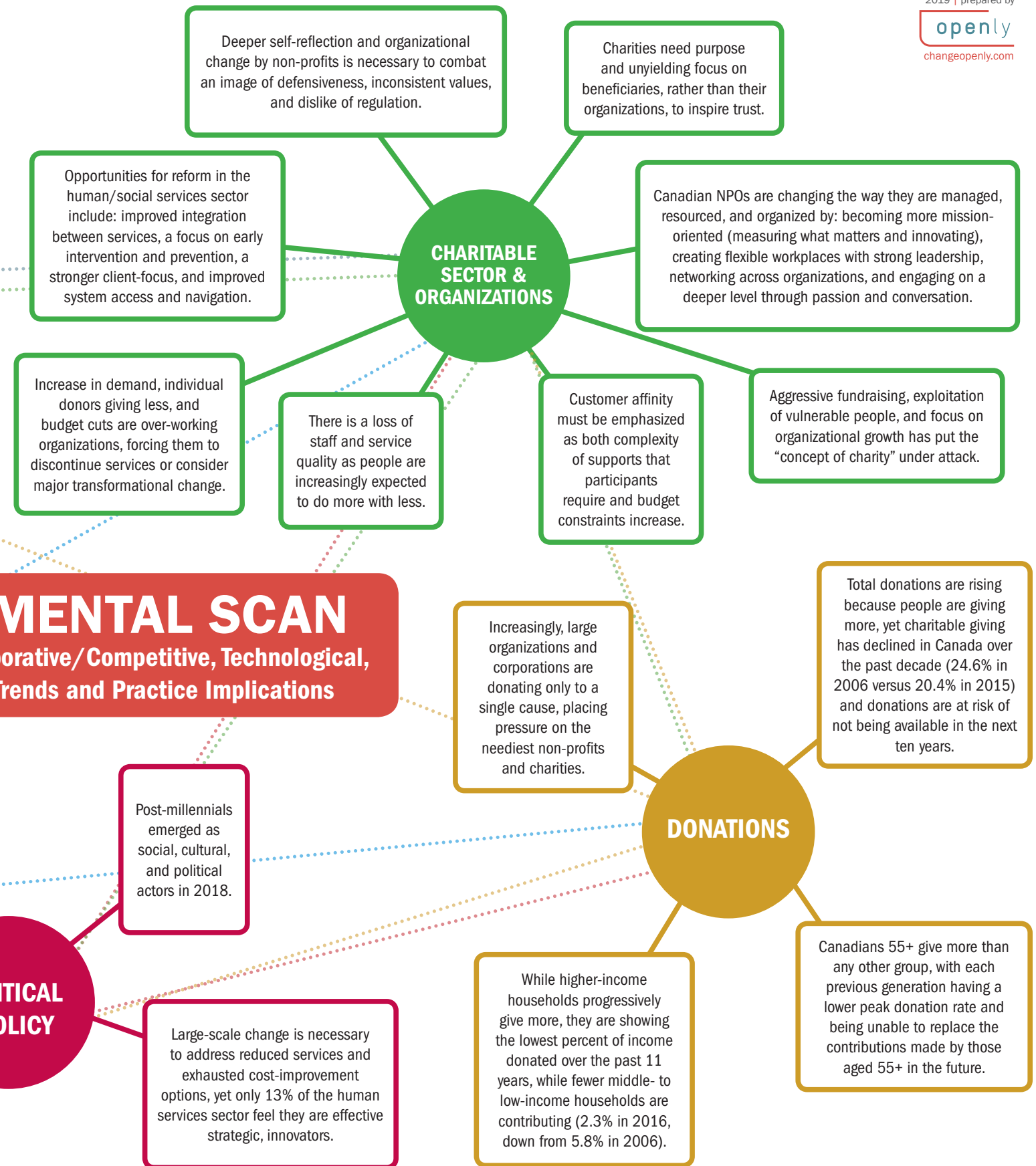


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## APPENDIX THREE:

### Consolidated Trends and Stakeholder Input

Stakeholder interviews and research scanning identifies important social, economic, policy, technology, and philanthropic trends and responses before us:

TREND	ADAPTIVE RESPONSE
<b>Demographics, employment, and giving are shifting, requiring new engagement strategies:</b> <ul style="list-style-type: none"> <li>→ long-time donors are retiring, manufacturers are changing, and younger workers connect in new ways,</li> <li>→ donors want direct and personal connections between their contribution and its impact,</li> <li>→ third-party relationships with donors are fragile</li> </ul>	<ul style="list-style-type: none"> <li>→ build individual relationships, unique to each supporter</li> <li>→ personally involve people in the issues; help them see they can make a difference</li> <li>→ champion new ways of collaborating for impact</li> </ul>
<b>The fundraising landscape is more complex:</b> <ul style="list-style-type: none"> <li>→ in United Way's traditional umbrella role, and</li> <li>→ new ways to give have emerged (e.g. crowdfunding), creating more donor options</li> </ul>	<ul style="list-style-type: none"> <li>→ move to the forefront of multiple new ways to give</li> <li>→ think boldly about UWGWD's role; make it visible</li> <li>→ be active year round</li> </ul>
<b>The importance of United Way's role isn't always visible:</b> <ul style="list-style-type: none"> <li>→ United Way is less visible part of the year,</li> <li>→ Social issues are complex and hard to change, and</li> <li>→ United Way's traditional pooled approach can make impact less clear on specific issues</li> </ul>	<ul style="list-style-type: none"> <li>→ educate community about United Way's potential</li> <li>→ achieve and show impact – line of sight - on specific issues</li> <li>→ tell compelling, real stories</li> </ul>

Planning participants reflect that:

- corporations and individuals are growing more likely to focus on (and give to) defined causes, and relationship management needs to become issue-segmented and focused upon individuals and corporations alike,
- community impact work allows United Way to address complex social issues, and highlight all of its work year-round,
- United Way needs a comprehensive business model that integrates and balances community impact planning and investment, communications, engagement and participation, and fundraising, and achieves measurable results, and
- United Way will need the capacity (new resources and skills) to achieve this transformation, and the ability to articulate why it is necessary.

Taken as a whole, input, reflection and analysis suggests that United Way pursue three directions:

- **boldly engaging stakeholders year-round**, in a shared purpose to help local community,
- **building individual relationships and ways** for stakeholders to participate and give to increase fundraising, support and collaboration, and
- **acting as a community impact leader** to coordinate plans, and achieve social results,

that reflect a need for United Way to build the capacity and respond transformationally to become recognized throughout the community as a trusted, credible, highly valued community mobilizer.






# BUSINESS MODEL

**MISSION** UWGWD strives to meet emerging and existing social needs in order to improve lives and build community.






**ASPIRATION** United Way builds community that **SHARES RESPONSIBILITY FOR SOCIAL GOOD.**



## TO CREATE THIS, WE

-  facilitate **ongoing engagement** with community issues
-  lead **collective solutions** to those issues (donors, agencies, supporters)
-  **mobilize support** for change (ideas, dollars, voices)

## LEADING TO

-  **continuous, individual communication** on the issues that matter to stakeholders
-  **reciprocal relationships** between United Way and supporters
-  **stakeholder awareness, engagement, and investment** in social issues
-  **credible collective strategies** to impact social issues
-  **trust and support** as a community mobilizer

## FOR

connected kids, adequate basic needs, sense of belonging, positive mental health and supports for seniors





# STRATEGIC PLAN

## INTENDED IMPACT

### A COMMUNITY THAT SHARES RESPONSIBILITY

for connected kids, adequate basic needs, sense of belonging, positive mental health and supports for seniors

#### WHAT

##### ENGAGED STAKEHOLDERS

- continuous, individual communication on the issues that matter to stakeholders
- reciprocal relationships between United Way and supporters

##### MOBILIZED COMMUNITY

- stakeholder awareness, engagement, and investment in social issues
- credible collective strategies to impact social issues

#### HOW

**DIRECTION:**  
be the leader  
for social good

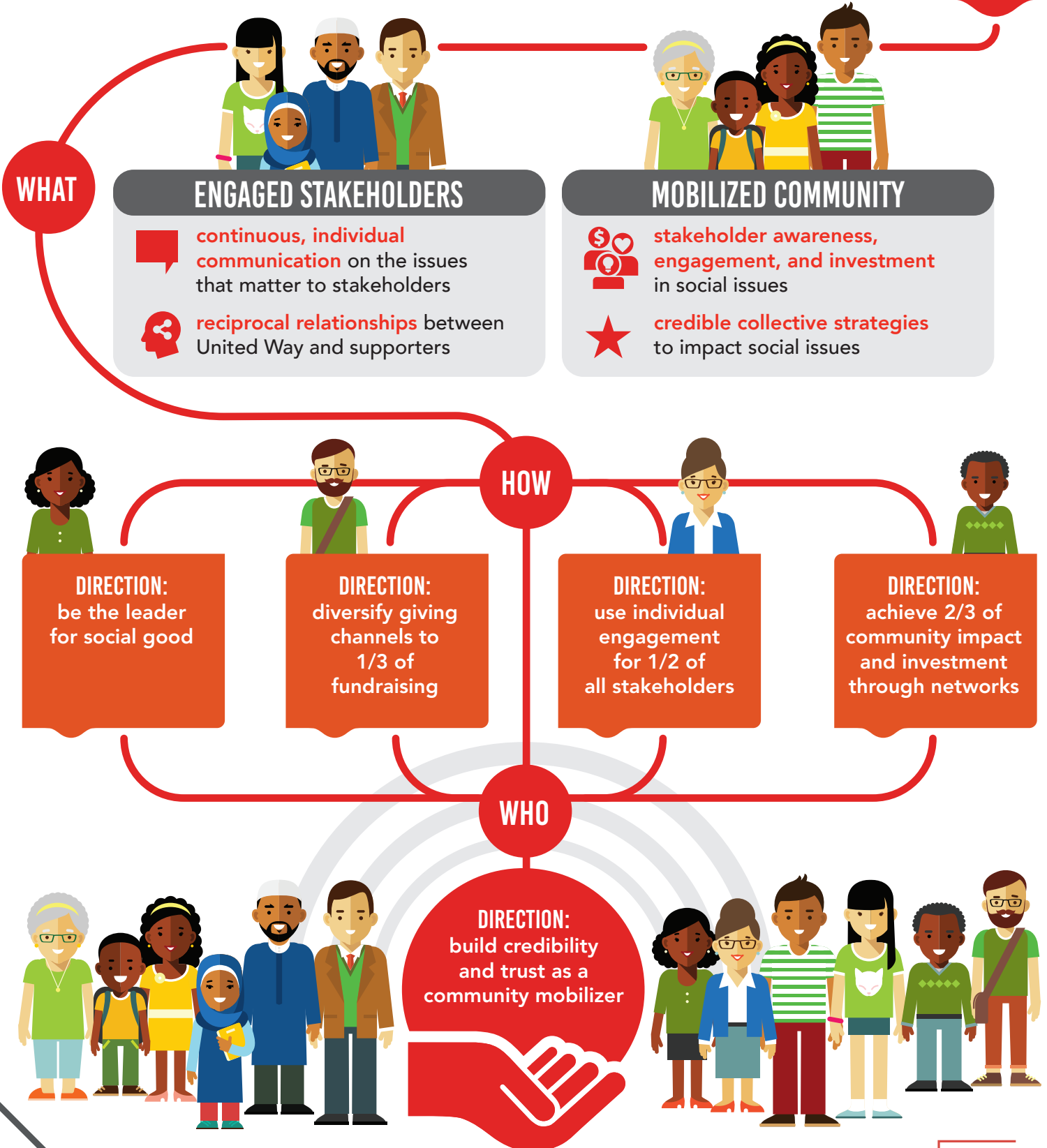
**DIRECTION:**  
diversify giving  
channels to  
1/3 of  
fundraising

**DIRECTION:**  
use individual  
engagement  
for 1/2 of  
all stakeholders

**DIRECTION:**  
achieve 2/3 of  
community impact  
and investment  
through networks

#### WHO

**DIRECTION:**  
build credibility  
and trust as a  
community mobilizer



## APPENDIX SIX:

### Projected Strategic Objectives

#### “BE THE LEADER FOR SOCIAL GOOD”

→ **STRATEGIC OBJECTIVE:** United Way delivers on its aspiration to build a community that shares responsibility for social good by engaging a cross-section of people and organizations through education on community issues, United Way’s role, calls to action, and results. 12-24 months

##### FOCUS:

- year-round marketing and engagement
- demonstrating responsibility through action (visible presence, hands-on opportunities, etc.)

##### RESOURCES:

- staff & volunteer time
- digital and online materials / platform
- marketing plan

##### SKILLS:

- streamed marketing, social media, community development expertise

#### “DIVERSIFY GIVING CHANNELS TO 1/3 OF FUNDRAISING”

→ **STRATEGIC OBJECTIVE:** United Way uses new technology, understanding of donor interests, and year-round engagement to solidify existing and build new fundraising channels. 6-24 months

##### FOCUS:

- dedicated major giving tied to community impact projects (product development)
- significant community giving channels (peer-to-peer, giving platforms, leveraging CRM)
- supporting workplace campaign with technology (online giving)
- making 1-1 relationships a core standard

##### RESOURCES:

- full-time MIG staff
- dedicated time to create new channels

##### SKILLS:

- peer-to-peer & MIG fundraising, product dev., and online giving expertise

## “USE INDIVIDUAL ENGAGEMENT FOR ½ OF ALL STAKEHOLDERS”

- **STRATEGIC OBJECTIVE:** United Way engages individual stakeholders through purposeful, streamed pathways, enabling relationship cultivation, education, participation, and stewardship, enabling reciprocal stakeholder relationships. 12-24 months

### FOCUS:

- making 1-1 relationships a core standard in all relationships (prioritizing retirees, indiv. donors, and stakeholders in the -40 demographic)
- shift to a customer relationship management approach to know and track the stakeholder

### RESOURCES:

- CRM system
- CRM champion / staff

### SKILLS:

- donor and client management expertise
- CRM / IT skills

## “ACHIEVE 2/3 OF COMMUNITY IMPACT AND INVESTMENT THROUGH NETWORKS”

- **STRATEGIC OBJECTIVE:** United Way acts as a credible systems leader, integrating investment with collective impact, amplifying collaborative work and results, and educating partners about United Way’s changing role. 6-24 months

### FOCUS:

- frame impact strategies as donor products
- resource the operation of networks
- engage new partners, aligned to common good

### RESOURCES:

- network dollars
- new staff time
- volunteer advisory

### SKILLS:

- network leadership and partnership expertise

## “ACHIEVE CREDIBILITY & TRUST AS A COMMUNITY MOBILIZER”

United Way diligently uses new and existing resources to activate the comprehensive approach necessary\* to create the broad consensus and credible strategies needed to build awareness, investment and action to improve lives and the community, and achieve lasting impact

\*as above

## APPENDIX SEVEN: Anticipated Results

<p><b>ENGAGED STAKEHOLDERS:</b></p> <ul style="list-style-type: none"> <li>→ continuous, individual communication on the issues that matter to stakeholders</li> <li>→ reciprocal relationships between United Way and supporters</li> </ul>	<ul style="list-style-type: none"> <li>→ All UW communications are tailored and streamed by donor profiles and responses (feedback loop) by 2021</li> <li>→ UW distills messages into key calls to action, overall purpose, specific issues, and deeper reference materials and uses online platforms</li> <li>→ an education campaign for all five strategies to inform understanding results in increased donor fluency in these strategies by 2021</li> <li>→ community members identify Guelph's top two social issues by 2021</li> <li>→ UW knows the CSR mandate of top 15 accounts</li> <li>→ 50% of donors in the top 10 campaign accounts have a detailed, donor profile by 2021 and are receiving segmented communications</li> <li>→ 50% increase of retention rate of donors at the 365+ level</li> <li>→ UW has an additional 7,000 stakeholders in the database by 2023</li> </ul>
<p><b>MOBILIZED COMMUNITY:</b></p> <ul style="list-style-type: none"> <li>→ stakeholder awareness, engagement, and investment in social issues</li> <li>→ credible collective strategies to impact social issues</li> </ul>	<ul style="list-style-type: none"> <li>→ UW offers stakeholder participation opportunities year-round (e.g. volunteerism, emergency response, leadership, tours, etc.), aligned with CSR for accounts, and interests by individual donors</li> <li>→ UW offers 4 high-profile community learning events each year</li> <li>→ 50% of stakeholders are moved to act (donate, volunteer, advocate)</li> <li>→ United Way has created new giving channels, using new technology, streamed engagement, year-round giving, and new products</li> <li>→ Two Community Impact Strategies are implemented and resourced by 2021, and all five outcomes by 2023</li> <li>→ UW is funding courageously, has achieved an intentional program vs network investment ratio by 2021, and has completed a needs based resource allocation shift, for the greatest community impact, by 2023</li> <li>→ UW is able to issue a call to action that achieves a unified community response, on an emerging issue, by 2023</li> </ul>



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