

# **UNITED WAY OF DELAWARE**

**Living United 2024:**  
*A Five-Year Strategic Plan to  
Transform Delaware's Trajectory Through True Collective Impact*

**Board Approved 04.18.19**

## EXECUTIVE SUMMARY

Over the last 14 years, United Way of Delaware (UWDE) evolved from a transactional organization operating an annual fundraising campaign to a relationship-based organization executing a year-round collective impact strategy. In those years, we defined our strategic priorities and focused a majority of our resources in Delaware's communities of greatest need. But, if UWDE is to achieve true collective impact, our strategic journey must continue.

To guide us on the next phase of that journey, UWDE's leadership has developed a new five-year strategic plan: *Living United 2024*. The plan retains our three existing strategic priorities--Grade-Level Reading, College and Career Success, and Financial Empowerment--and our focus on Delaware's eight promise communities. These priorities are fundamental to Delaware's progress, play directly to UWDE's strengths and will remain relevant across the five-year longitude of our plan.

*Living United 2024* puts significant emphasis on the need for improving UWDE's operational excellence and delivering on our goals with a heightened urgency. Simply put, WHAT we do may not change over the next five years, but HOW we get our work done will change dramatically.

This more aggressive approach to operational excellence will require that UWDE lean in to those qualities that define our unique value proposition. As we implement *Living United 2024*, these are the operational qualities we will leverage in pursuit of excellence:

- Lead with urgency
- Focus on driving change at the grassroot *and* systemic levels
- Leverage our position as a statewide convener, collaborator and thought leader
- Become the donor's philanthropic partner of choice
- Achieve our financial targets

## BACKGROUND

More than 14 years ago, United Way of Delaware (UWDE) took a look in the mirror. What leadership saw was an organization in a repetitive cycle of transactions, rooted in the annual workplace campaign model that had served UWDE well for many years. But Delaware—and philanthropy in general—was changing rapidly. Many Delaware businesses were merging, consolidating, moving or closing. The concept of a “job for life” at a single employer, the very foundation of the workplace campaign model, was shifting underfoot. And as the internet evolved, donors were being presented a new and dizzying array of charitable giving options.

Leadership at the time determined that UWDE would adapt to these macro changes. We therefore developed and implemented a series of multi-year strategic plans, all of which fostered the organization's evolution from an inward-facing transactional model, to today's outward-facing, relationship-based model built on the concept of collective impact. Collective impact is the idea that by working with others in a structured fashion we can achieve much more together than we could ever achieve alone. This commitment to collective impact is the driving force that powers UWDE's strategic journey. And in seeking collective impact, UWDE is guided by the following mission and vision statements:

### **Our Mission**

United Way of Delaware works to maximize the community's resources to improve the quality of life for all.

### **Our Vision**

United Way of Delaware envisions a community where everyone has an opportunity to achieve his or her potential. The core vision of the three strategic priorities ensure that:

- Delaware children are reading on grade level and prepared to succeed in school
- Delaware's young people are prepared for college and/or workforce success when they graduate from high school
- Delaware families are financially stable and positioned to thrive

With this mission and vision, UWDE has successfully implemented three successive strategic plans and is no longer a transactional organization. We built an enviable statewide network of relationships with a wide range of community stakeholders. We refined the scope of our work into the three strategic priority areas and we concentrated our resources in Eight Promise Communities (“promise communities” or “our promise communities”). We have designed and implemented, or have partnered in the design and implementation of, programming that gives substance to our strategic focus areas. And after several years of decline, we stabilized our fundraising situation.

Yet despite this success, UWDE is not yet a true collective impact organization. As a collective impact organization, *all* of our partners will share our vision, we will measure our progress with shared metrics and we will engage every partner in mutually reinforcing activities that drive our mission forward.

And so our strategic journey must continue. To guide us on this journey, UWDE is adopting a new five-year strategic plan: *Living United 2024*. The hallmark of *Living United 2024* is straightforward: while WHAT we do may not change, HOW we execute will change dramatically.

### **Leading With Urgency**

The social problems we seek to address are complex and deep-rooted. There are no quick, easy solutions. And though we are focused on three long-term strategic deliverables, UWDE is mindful that our work does not occur in a vacuum. What we seek to achieve with *Living United 2024* will play out in environments that are often marked by generational poverty, chronic unemployment, high crime, low graduation rates, poor health conditions, substance abuse and more. No single organization, UWDE included, can succeed on its own in this environment; the case for pursuing our strategy through collective impact is self-evident.

Generating that collective impact will require that UWDE *lead with urgency*. This means leveraging our global brand, applying the depth and breadth of our statewide reach, activating our relationships across the business community, effectively deploying our financial and human resources and setting the tone and pace for collective impact in Delaware.

The core principles of *Living United 2024* are as follows. UWDE will:

- Organize its work within a collective impact framework
- Seek collaborative relationships focused on achieving common goals
- Share goals, accountability and metrics with its partners
- Seek or design programming that is multi-generational and holistic
- Work at both the grassroot and systemic levels
- Strengthen community engagement activities
- Execute on a single business model
- Achieve a world-class donor experience
- Advocate for policies that sustain our impact
- Aggressively pursue its financial goals
- Operate in a flexible, nimble style

### **UWDE's Unique Value Proposition**

In leading with urgency, UWDE brings significant skill sets to bear. Together, these qualities form UWDE's unique value proposition:

- ***UWDE Works at the Grassroot and Systemic Levels:*** We enable direct services while also driving system-wide change.
- ***UWDE is a Bridge Builder, Convener and Thought Leader:*** We build and maintain relationships with the public, private and nonprofit sectors. We leverage these relationships to foster cooperation in achieving shared goals.
- ***UWDE is a Capacity Builder:*** We are Delaware's leading fundraiser for nonprofits. We provide unrestricted support to many of our partners and in so doing, we build their capacity to execute on their missions.

- ***UWDE is a Jobs Partner:*** We help ensure that our young people are prepared to join and succeed in Delaware's workforce.
- ***UWDE is Customer Focused:*** We align with donor aspirations, at both the corporate and individual level, and we seek to help donors realize those aspirations through strategic partnerships.



## LIVING UNITED 2024: OUR WHY

UWDE believes that social change and outcomes matter. But our goal is to change more than the singular conditions we encounter in the promise communities. UWDE seeks to change the *trajectory* of these communities. And in so doing, we also seek to improve the trajectory of our collective future as Delawareans.

UWDE exists to accelerate and amplify the individual impact of our donors, agency partners and community stakeholders. We create impact that is broader and greater than the sum of its parts. As we approach our work, we address the issues in our promise communities across a *continuum from birth through adulthood*. This “Community Continuum” approach provides a broad perspective that engages UWDE in multi-generational initiatives that drive short-term improvements *and* long-term cultural shifts.

*This* is what makes UWDE different from other more singularly focused nonprofits. This is true collective impact. This is our “Why.”

The Community Continuum approach addresses Delawareans in four life phases:

- *Developing*: Birth through Elementary School
- *Exposing*: Middle School
- *Practicing*: High School
- *Applying*: Post-High School

As we work across the Community Continuum, UWDE will collaborate with others to implement existing initiatives, perfect emerging initiatives and develop new initiatives that address each of these phases. We will manage a “Lead Program” in each phase, and will often be involved in managing supporting programs as well.

Some of these lead and supporting initiatives have been underway for years, while others are recent additions. *Living United 2024* calls for bringing our lead and supporting programs to greater scale, while also identifying and developing emerging programs that add value to our work.

## LIVING UNITED 2024: OUR STRATEGIC GOALS

### Grade-Level Reading

Too many children in the promise communities are not reading on grade-level. Compared with their peers from more affluent communities, many of these children fall into an academic achievement gap that becomes increasingly difficult to escape. Often children in this gap do not graduate high school, fail to prepare for college or fail to gain the career success skills necessary to enter and thrive in the workforce.

In response to this situation, UWDE has launched *Get Delaware Reading*, a multi-year, multi-generational, year-round and holistic partnership aimed at ensuring that an increasing number of Delaware children are reading on grade level when they enter fourth grade. Other supporting initiatives in this area include our Help Me Grow, My Very Own Library, Make Summer Smarter, and Delaware Afterschool Network.

### UWDE's 2024 Grade-Level Reading Goals

#### Primary Goal

- 50% of students in Delaware's promise communities will read on grade level by 4th Grade.

#### Supporting Goals

- Foster equity in our promise communities by working to ensure that appropriate levels of funding and other resources are delivered to these communities.
- Ensure that adults who directly impact students in our promise communities will have the knowledge and assets to enhance a child's development.
- Partner with community-based organizations who share our agenda and deploy a multi-generational approach to literacy.

In executing its Grade-Level Reading strategy, UWDE will aggressively pursue the goals of *Get Delaware Reading*, a dual-generational approach of engaging children and their caregivers in year-round, evidence-based activities that drive significant gains in reading scores. As part of this strategy UWDE will align its work with existing best practices and will move with determination to:

- Expand the *Help Me Grow* initiative to screen for developmental milestones
- Adopt Nemours' Bright Start! Reading curriculum
- Aggressively expand *My Very Own Library*
- Engage with *Parents As Teachers*, *Read Assist Delaware* and others to amplify their work
- Expand *Make Summer Smarter* to prevent summer learning loss
- Adopt family engagement strategies that include home visits to counsel parents regarding employment opportunities, financial management skills, and other intervention strategies

## **College and Career Success**

Young people living in high-need areas such as our promise communities are much less likely than their peers in more affluent communities to be prepared for college and/or career success. In 2015, then Governor Jack Markell issued an executive order creating *The Delaware Promise*, a state commitment to ensure that by 2025, 65% of Delaware's workforce will have earned a college degree or professional certification, matching the percentage of jobs that Delaware forecasts will require one. UWDE has been a partner in this work from the start.

In response to this situation, UWDE engages young people in initiatives that foster learned behaviors and developmental skills essential to success in the workplace. We successfully launched *Step On It!*, our signature middle school program, we collaborate with the State of Delaware and others regarding *Pathways To Prosperity* which provides young people career training and mentoring experiences, and we collaborate with the City of Wilmington and others to implement a *Summer Youth Employment Program* that places young people in real-world work situations.

### **UWDE's 2024 College and Career Success Goals**

#### **Primary Goal**

- **75% of students from our promise communities within Delaware Pathways will matriculate into college or a career upon high school graduation.**

#### **Supporting Goals**

- Foster equity in promise communities by working to ensure that appropriate levels of funding and other resources are delivered to these communities.
- Ensure that adults who directly impact students in our promise communities will have the knowledge and assets to enhance a child's development.
- Partner with community-based organizations who share our agenda and believe in and support work-based learning.

In executing its College and Career Success strategy, UWDE will work to ensure that Pathway students in our promise communities graduate from high school with the certification necessary to move straight into the job market, and/or to take on the challenges of college. This will include focused conversations regarding apprenticeships, credentialing, post-secondary education, and military service. Early work experiences play a critical role in healthy youth development. Through summer jobs, young people explore career options, discover personal interests and strengths, learn about work culture, build professional networks, develop skills and earn a paycheck.

Focusing its work in our promise communities, UWDE will pursue a laser-focus to develop grassroots strategies that identify and engage a growing number of young people and, especially middle school students, in initiatives that prepare them for college and/or a career success. We will collaborate with community-based organizations to help youth develop the learned behaviors, developmental assets and developmental skills that will serve them in achieving lifelong success.



## **Financial Stability and Empowerment**

Too many Delawareans are living at or near the poverty line, are pressured by dealing with traumatic living conditions, suffer employment instability or lack the education and/or vocational training necessary to stabilize their lives and achieve financial empowerment. Typically living paycheck-to-paycheck, these Delawareans often turn to payday lenders, high-interest credit cards and other financially dubious tools to pay everyday living expenses. This behavior sets up a cycle of indebtedness that can seem inescapable and that makes the idea of financial independence seem unachievable. In Delaware, African Americans are more than twice as likely as whites to live in poverty, and Hispanics are three times more likely to be poor. Urban areas experience higher rates of poverty. Poverty in Kent and Sussex Counties is higher than in New Castle County.

In response to this situation, UWDE has successfully partnered with the State of Delaware to build and expand the *Stand By Me (\$BM)* initiative, which positively impacts the lives of thousands of Delawareans with financial training and coaching. At the same time, we have built awareness of the Delaware 211 Helpline (211) brand as a “go-to” resource for Delawareans seeking assistance for a wide range of issues, including financial problems and we are working to diversity 211’s portfolio of resources to assist in these situations.

### **UWDE’s 2024 Financial Stability and Empowerment Goals**

#### **Primary Goal**

- **50% of the adults that engage UWDE’s financial empowerment resources will resolve their emergency and ameliorate the root cause(s) of their financial problems.**

#### **Supporting Goals**

- Foster public policy that advances financial stability and empowerment.
- Ensure that resources are advanced and distributed equitably.
- Evolve UWDE’s focus to include financial acumen as the appropriate follow-up to financial empowerment

In executing its Financial Empowerment strategy, UWDE will aggressively pursue engaging individuals and families in intervention, education and coaching techniques that will help move these Delawareans from financial crisis to financial stability and ultimately, financial empowerment. We will connect Delawareans with the education and training resources, and other wraparound services needed to move from low-skill/low-pay jobs to mid-skill jobs that provide a living wage and ultimately, to career-level opportunities.

The primary vehicle for this work will remain \$BM, which UWDE developed and operates in partnership with the State of Delaware. \$BM offers free one-on-one support to Delawareans who want to understand more about their money, make good financial decisions, and achieve financial goals. And through our administration of the Delaware 211 Helpline, we will continue to engage and counsel Delawareans as they cope with a wide range of social, emotional, and financial crises.

## **Philanthropy and Engagement**

Delaware's business community continues to evolve. No longer as heavily reliant on the banking and chemical sectors as it once was, the state's economy is now more diverse, with more small and mid-sized businesses and start-ups. After several years of declining fundraising results, UWDE closed its 2018 campaign having achieved its goal of \$15.5 million. As of the draft date of this strategy, Delaware's unemployment rate stood at a 10-year low of 4.0%, job growth was predicted at 0.6% through 2026, and real GDP was expected to improve by 1.6% in that same time frame.

This generally healthy economy should support modest revenue growth for UWDE over the five years of *Living United 2024*. At the same time, UWDE maintains a healthy base of nearly 22,000 donors, though this participation rate of 12% of the marketplace falls short of United Way's national average participation rate of 18%. And UWDE has engaged more than 4,200 volunteers in a wide range of activities in support of its strategic objectives.

These metrics notwithstanding, UWDE must continue to grow revenue and engagement commensurate with the challenges we will face over the next five years. We believe there are a number of untapped markets that will support this growth.

### **UWDE's 2024 Philanthropy and Engagement Goals**

#### **Primary Philanthropy Goals**

- **Grow revenue at an average 2.3% compound annual growth rate (CAGR) over the plan period.**
- **Grow Resources Under Management (RUM) at an average 2.6% CAGR, or about 60% of funds raised.**

#### **Primary Engagement Goals**

- **Grow the number of donors at an average 4.1% CAGR over the plan period.**
- **Grow the number of volunteers and an average 8.2% CAGR over the plan period.**

Over the five-year plan period, UWDE will drive revenue growth by:

- Targeting and developing a wide range of Promising Accounts through direct CEO calls and expansion of campaign kickoff activities
- Adding new accounts through direct prospecting
- Pursuing grants that align with our strategic initiatives

Over the five-year plan period, UWDE will drive engagement growth by:

- Targeting an increase of 2,045 volunteers, a 4.1% increase
- Recruiting volunteers from our top 50 accounts

## **Our Customer Experience**

The donor, both individual and corporate, is UWDE's customer.

### **UWDE's 2024 Customer Experience Goal**

**UWDE seeks to be our customers' philanthropic partner of choice.**

We will work with customers to understand their philanthropic goals and aspirations, offer choices that align with those passions, and work to ensure that their investments achieve the greatest possible social return. As a trusted partner, we will keep our customers abreast of how our strategy aligns with the community's needs, and we will work to define the most effective ways in which donors can address those needs.

Nothing is more important than the trust and confidence of our customers. As stewards of our donor's funds, UWDE maintains the highest standards of professionalism, accountability, integrity and transparency when handling these funds. Equally, UWDE values the trust donors place in UWDE when they share their personal information. UWDE will adhere to the highest standards in collecting, using and safeguarding personal information and under no circumstances will UWDE share or sell this information outside UWDE.

Over the plan period, UWDE is committed to continually refining its donor experience, with the goal of providing every donor with a "world-class donor experience." By this we mean that when we work with donors, UWDE will be:

- Properly resourced with the data and services donors expect.
- Prompt and responsive
- Appropriate by tailoring our services for each individual
- Personable, engaging, and polite
- Meticulous by keep first-class donor records
- Prepared to meet donors where they are, which may mean covering off hours.
- Open and honest
- Cheerful and helpful

## **Brand Development**

While marketplace awareness of UWDE is generally positive, too many people in Delaware do not understand what we do, the value we add, or how we operate. As the philanthropy landscape continues to evolve, other nonprofits are pitching for direct support, some businesses are shifting toward open campaigns, and consumers, especially millennials, are trending toward online donations through a growing number of philanthropy apps. In this environment, it is more important than ever that UWDE be mindful of the value of its brand.

UWDE has made important advances in addressing this situation, including a monthly newsletter, an aggressive social media strategy, and a recently refreshed website. Importantly, our continued presence in the community through our participation in a wide range of community activities also contributes positively to the public's understanding of UWDE. We must broaden and deepen these efforts over the course of the plan period.

### **UWDE's 2024 Brand Awareness Goal**

**Build awareness of and engagement with the United Way of Delaware brand.**

We will do this by more frequently and deliberately sharing compelling stories of our work in all media and by:

- Establishing, through research, a baseline understanding of the degree to which donors and potential donors in our marketplace:
  - Are aware of the UWDE brand
  - Understand the UWDE business model
  - Have a positive/negative impression of UWDE
- Planting a "data flag" in the ground at the launch of Living United 2024 as a reference point to determine how effectively our strategy influences public opinion over the five-year plan period
- Updating and refining UWDE's Case for Support
- Developing consistent messaging and branded materials for all audiences
- Engaging new audiences with compelling social media content
- Executing a comprehensive media relations plan
- Constantly refreshing and updating UWDE's website



## **LIVING UNITED 2024: CLOSING THOUGHTS**

After nearly 75 years of service to Delaware, UWDE is among the most trusted and respected nonprofit organizations in the state. We have been entrusted with both the opportunity and the responsibility to serve with a level of leadership necessary to improve the quality of life for all Delawareans.

Moving forward, our work is rooted in this five-year strategic plan. We are confident that our vision, mission, values and strategic direction will keep us focused on addressing the most pressing needs in our communities. Our commitment is to advancing this work in as a statewide leader that embraces the spirit of collective impact and that acts with urgency.

While this document sets our direction for the next five years, we will monitor progress and results on an ongoing basis, making the necessary adjustments to remain on track to meet our strategic goals.

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