

UNITED FOR IMPACT:

Building Pathways to Potential



United Way of
Southwestern Indiana

Overview

For nearly 100 years, United Way of Southwestern Indiana's mission has been to strengthen communities and improve lives. As the world and marketplace rapidly evolve, our United Way must adapt and respond to these changes. To ensure we are good stewards of donor investment dollars, it is essential that we focus our efforts and investment to make the greatest impact on the priority issues facing our community today. To that end, United Way of Southwestern Indiana (UWSWI) is unveiling a new strategic direction, investment focus, and goal for our impact work.

Strategic Direction

In 2018, UWSWI embarked on a strategic plan to engage donors, businesses, Partner Agencies, and the public in a conversation about the issues facing our community and how donations are invested to address those issues.

The conversations, the Community Health Needs assessment, the statewide ALICE report, and data gathered through the Talent 2025 Initiative revealed that poverty and the challenges surrounding those who are employed, yet struggling, are the most pressing and pervasive issues facing our region. Our donors, key business partners, and the Talent 2025 Initiative have asked that we take a lead role in solving these complex issues. UWSWI is uniquely positioned to convene and leverage resources, technology, and human capital to drive systemic change such as this.

Accordingly, UWSWI and its Board of Directors have refined its vision and mission statements and have also approved a new strategic framework. The framework – United For Impact: Building Pathways to Potential - will focus investment and impact efforts into the goal of empowering individuals and families with resources to support upward mobility.

An exciting element of our strategic shift will be new opportunities for local 501(c)(3) nonprofits to apply for funding to help achieve our goal. In addition, UWSWI will invest in high-priority outcomes that are demonstrated to improve upward mobility, such as graduating on time, increasing wages, or earning licenses and credentials.

The framework moves UWSWI to a process of identifying a high-priority issue, utilizing an open process to convene resources, and providing investment to drive measurable change in solving the problem.



VISION STATEMENT:

United Way envisions communities where all individuals and families have the opportunity to achieve their full potential.



MISSION STATEMENT:

Unite resources to understand and address priority community issues.

How United Way Will Invest In Our Community

For many years, UWSWI has conducted an annual fundraising campaign, soliciting our community for corporate, employee, and individual donations. Donations were then invested into "Partner Agency" programs and United Way programs, such as K-Camp and Volunteer Income Tax Assistance. In this new approach to addressing our community's most critical issues, UWSWI will retire the legacy concept of "Partner Agencies." **Demonstrated measurement of high-priority outcomes toward our goal of empowering families with resources to become upwardly mobile will be the criteria for which funding will be made available at this time.**

High-Priority: Upward Mobility

Identified Outcomes:

- Individuals gain employment
- Individuals increase wages
- Individuals receive job-relevant licenses, certificates or credentials
- Increase in disposable income through accessing benefits
- Individuals receiving mental health services improve functioning as assessed by a qualified mental health provider (e.g. occupational, social/relational)
- Youth graduate on time
- Youth (15-24) obtain post-secondary employment, enroll in higher education, or earn certificates /credentials
- Children achieve critical developmental milestones



Goal

Empowering individuals and families with resources to support upward mobility

Open Funding

The first Request for Proposal (RFP), to be released in the fall, will fund activities and initiatives meeting the following objective and outcome:

Objective: To empower individuals with resources and services to gain employment

Measured Outcome: Individuals gain employment

Roughly \$250,000 of funding will be available through the RFP and all pertinent details will be released in mid-September when the application window opens. Any 501(c)(3) nonprofit organization operating within our service area, even those who receive transition funding, may apply through the new competitive Request for Proposal process.

Other Outcomes Our Partners Measure

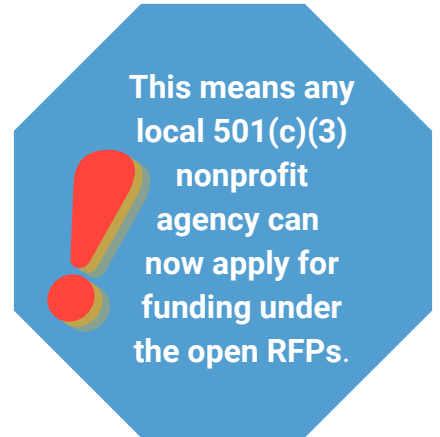
Although all of our currently-funded programs are valuable to the community, not all are measuring the outcomes that have been identified as high-priority for upward mobility. The Board of Directors has thoughtfully developed a plan for those agencies to be eligible for transition funding for up to 18-30 months* (depending upon the percentage of program budget UWSWI provides) to allow time to diversify program revenue sources.

**contingent upon meeting reporting requirements*

Who Is Involved

Community Partners

Partnerships are based on a collaborative model where UWSWI acts as a convener of resources, not only investing funds, but also inviting partners to develop strategies that demonstrate success toward our goal for the community. In this new framework, "partners" are no longer limited to a closed group of agencies that have been able to apply for annual investment. Funding opportunities will focus on high-priority outcomes and the RFP process will be open to any 501(c)(3) nonprofit organization that serves our three-county area.

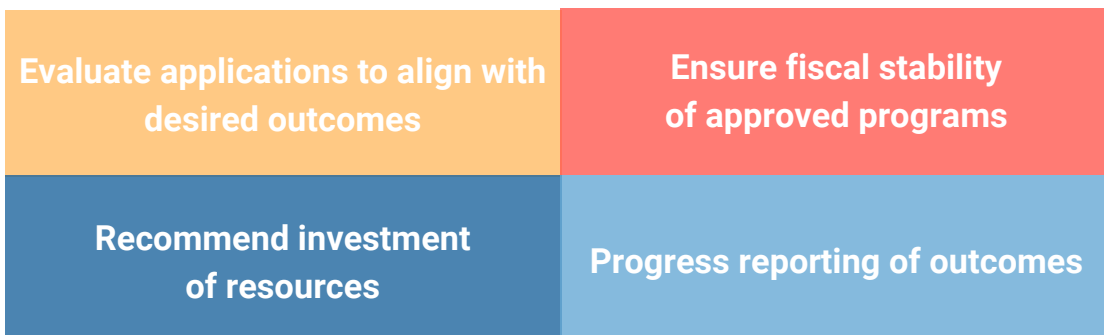


Impact Cabinet

Our Community Impact Cabinet is a standing committee of the UWSWI Board of Directors. Its role is to provide oversight for impact strategies and investments. To avoid any potential conflicts of interest, no employees of any funded community partner may be a voting member of the Impact Cabinet. UWSWI strives to maintain integrity and fairness, while selecting the most effective investments toward our goal.

Impact Panels

UWSWI utilizes a diverse group of cross-sector volunteers and professionals to serve on our Impact Panels. These diligent and passionate volunteers include subject matter experts, business leaders, young professionals, donors, and those who have an interest in community issues. Members of the Impact Panels assess the applications of Community Partners, ensure their fiscal stability, recommend investment, and monitor the reported outcomes to ensure the investment of donor dollars is accomplishing the desired impact.



What is Talent 2025?

A group of 100+ stakeholders in Vanderburgh, Gibson, Warrick, Posey & Henderson counties working together to make our region the talent & economic place of choice. UWSWI leads the poverty reduction workgroup.

Quick Facts

Aspirations Voiced in Harwood Community Conversations

- Opportunities for everyone to be employed at the highest level possible
- Opportunities exist for people in need to achieve self-sufficiency
- Cradle-to-grave learning and empowerment opportunities
- Address underlying causes of homelessness, addiction, and unmet basic needs
- Focus on social determinants of health: housing, transportation, and mental health
- Programs for early learning, financial literacy, and the promotion of skilled trades



UPWARD MOBILITY:
the capacity to rise to a
better economic position

Community Health Needs Assessment Priorities*

Vanderburgh County

- Poverty
- Food Access & Food Insecurity
- Mental Health
- Substance & Alcohol Abuse
- Chronic Health Conditions

Warrick County

- Mental Health
- Substance and Alcohol Abuse
- Chronic Health Conditions
- Access to Care

*Spencer County Data unavailable



7th

Vanderburgh County's state
rank for both impoverished and
employed, but struggling,
families

"Survival" Wage in Vanderburgh County

\$11.30

Single

\$31.24

Family of 4

ALICE Report:

A financial hardship study focused on Hoosiers in poverty and those who are asset-limited, income-constrained, but employed

*wage required to meet basic needs of housing, food, transportation, etc.

Data Source: 2020 ALICE Report based on 2018 point-in-time data

Summary

United Way of Southwestern Indiana has developed this overview to help donors, business partners, and the general public understand the evolution taking place and the process by which we came to this new strategic framework.

We believe we are the organization to mobilize our community to drive social change. That means we cannot do this alone. We must Unite for Impact. We urge you to join us.

Why the Change?

- Donors, key business partners, and the greater community have asked UWSWI to take the lead on tackling the pervasive issue of poverty and the challenges facing those who are employed, yet lack resources.
- Poverty has been a long-term problem in our community; however, the COVID-19 pandemic has intensified it - bringing new obstacles to gaining and retaining employment, maintaining housing, and supporting students who are falling behind.
- The challenges of those who do not have the resources to meet basic needs are multi-faceted and demand a collaborative, systemic approach. Narrowing our focus to concentrate resources toward this problem will enable United Way to activate deeper, long-term change.

What's New?

- United Way is focusing its investment into outcomes that empower individuals and families with resources to support upward mobility.
- Open Request for Proposals will be released, with the first in September, that allow any 501(c)(3) nonprofit organization that provides services in our three-county area to apply for funding for initiatives that align with the stated goal.
- The concept of "Partner Agencies" will be retired.
- Outcomes not identified as high-priority in supporting upward mobility will be eligible for transition funding for up to 18-30 months, subject to annual UWSWI Board of Directors approval.

How To Unite for Impact

- **ADVOCATE** - Become educated about the systemic, historic, and structural barriers that contribute to limited resources and opportunities for upward mobility (e.g. race, location, disability, language).
- **VOLUNTEER** - Serve on an Impact Panel to help guide community investments.
- **GIVE** - Solving a difficult, complex issue takes all of us working together - LIVING UNITED. Join us in building pathways for each person to reach their potential.



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