

# Our Way Forward:

## United Way of Calgary and Area 2023-2027 Strategic Plan



**United Way**  
Calgary and Area

## Introduction

### Background

Serving as a compass to guide our work, United Way of Calgary and Area's strategic plan sets our intention, articulates what we stand for, builds on our strengths, and sets guidelines to realize our potential. Our Way Forward: 2018 - 2022 Strategic Plan set the course for United Way's transformation over the past five years, and as we continue this transformative work, it remains a relevant and meaningful strategic plan to build upon.

In 2021, United Way's Board of Directors approved a Strategic Plan Refresh to be conducted in 2022. The direction was to undertake a "refresh" exercise as opposed to a wholesale change, with the intent of sharpening some of the existing strategic direction and being responsive to changed environmental conditions, such as economic and social instability caused by the COVID-19 pandemic and pre-existing factors in significant sectors such as the energy sector.

### Key Successes of Our Way Forward, 2018 - 2022 Strategic Plan

United Way is proud of the achievements made throughout the duration of the 2018 - 2022 Strategic Plan. We created a refined and ambitious Revenue Generation Strategy, a meaningful Diversity, Equity, and Inclusion strategy, a new, focused Community Impact Framework, and we are embarking on our digital transformation. Organizational transformation takes time, and we have been working hard and strategically over the past five years to strongly position our organization for long term, sustainable impact in Calgary and the surrounding area.

### Strategic Plan Refresh

We took an honest look at the challenges before us and pushed the envelope on how to embrace these challenges as opportunities. Our resulting Strategic Plan is inclusive, thoughtful, and purposeful. It confronts the realities of a rapidly changing world, sets the trajectory for United Way moving forward, and builds on our strengths to ensure we deepen community impact by expanding our reach, inspiring relevance and commitment, and growing revenue. Following valuable input from United Way's Board of Directors, and in-depth review and analysis by the management and staff team, the following document outlines United Way of Calgary and Area's refreshed Strategic Plan which sees the organization through to 2027.

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## Our Way Forward - Refreshed Strategic Plan

### Our Purpose

#### About Us

United Way of Calgary and Area is a registered not-for-profit organization that has existed for more than 80 years. As part of a federated network that forms the United Way movement, we have a long-standing history of developing deep roots and trust with our community. As a social impact organization, we mobilize the caring spirit of our community by bringing together corporations, donors, volunteers, governments, and agencies with the common purpose of working together to improve local lives. Working with community, we are upholding a caring and compassionate society that values diversity, inclusion, and opportunity for all.

#### History

Born as part of a worldwide movement more than a century ago, United Way's unwavering focus has been to improve lives through the power of communities. As one of Canada's largest and most widely recognized not-for-profit organizations, United Way has over 70 offices nationally which offer or support more than 6,000 programs. Globally, there are 1,800 offices in 40 countries and territories that impact more than 50 million lives annually around the world. Each office is registered as its own not-for-profit organization and governed by an independent volunteer-led Board of Directors.

#### Creation Story

United Way's Creation Story details the evolution of our journey of working with Indigenous communities in Calgary. This story is formed with the help and validation of the Elders. The Creation Story helps us incorporate an Indigenous lens across all of our work, signaling our commitment to being an ally and supporter of Indigenous communities.

### Our Values

- Demonstrate trust, integrity, respect, transparency, inclusivity, and diversity
- Inspire donor and volunteer engagement
- Energize innovation, partnerships, engagement, and collective action
- Lead in an unbiased, evidence-based, and principled way to advance community good for all
- Steward resources and leverage investments efficiently and effectively

### Vision

- A resilient and caring community where everyone thrives.

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### Mission

- To mobilize communities for lasting social change.

### Value Proposition

- We are local experts who bring people together to solve complex social problems to improve lives.

### Our Work

Every day, people across our community struggle to build better lives for themselves and their families. Their challenges are fueled by serious social and economic barriers which make getting ahead difficult and threaten the strong social fabric that is vital to individual, family, and community well-being.

We help people and families build better lives – today and tomorrow. We dig deep into the underlying causes holding people back from reaching their full potential, and overcome these issues with solutions that create meaningful, lasting change.

Working within a strong network of social services and not-for-profits, we work together to advance common outcomes through research, initiatives, and programs. We use our collective voice to influence public attitudes, systems, and policies. And we engage with community to create grassroots change.

With the caring support of Calgarians, we are building a strong social safety net so everyone has access to social supports when they need them most. We do this through programmatic investments, innovation, and collaborative systems change.

### Principles

In order to deepen community impact, the following principles and levers will be utilized.

1. **SYSTEMS APPROACH:** When understanding social issues and designing solutions, we will use a systems lens. This includes:
  - Basing analysis in how different systems and different levels of systems interact (individual, community, sector, system)
  - Recognizing the person at the centre of the system
  - Identifying where in the system we can create the greatest impact
  - Engaging people and organizations across different sectors
  - Acknowledging the deep interdependence between issues
  - Indigenous and Western systems work in ethical space

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2. **GROWTH MINDSET:** We will focus our efforts on creating value for the social sector and community as a whole. We will emphasize measuring our success by the impact we contribute through our own actions and through the partnerships we participate in. We believe in abundance, noting that fundraising is a key activity but not our organizational purpose. We will focus relentlessly on our chosen outcomes.
3. **EMERGENT RESPONSE:** To have a deep impact, we have to have a broad understanding. We will need to engage in simultaneous information gathering, planning, and execution, with a focus on flexibility to be responsive to a changing landscape. A key component is a constant process of collecting and analyzing information from the environment to guide our decisions.
4. **COLLECTIVE ACTION:** Deepening community impact won't happen if we are acting in isolation. Addressing complex issues requires that we have a greater focus and more resourcing for activities that bring together multiple partners such as convening, collaboration, and co-creation.
5. **EQUITY & INCLUSIVITY:** Issues of equity and inclusivity are central to solving complex social issues. This will form a key consideration in how we decide what to participate in, where we spend our greatest efforts, and the ways we work and set an example in the community.
6. **SOCIAL INNOVATION:** Through processes of seeking new information and partners, getting outside our "bubble", and engaging in continuous prototyping and testing, we will seek new ways of deepening community impact.

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### Three Foundational Goals

As a social impact organization, everything we do is driven by our desire to create lasting social change. Three foundational goals will advance our strategic direction over the next five years to help us achieve this. Interdependent, all three support and build on one another.

1. Deepen community impact
2. Establish a robust revenue portfolio driven by change-makers
3. Demonstrate excellence as a trusted, high-performing organization

### Goal 1. Deepen Community Impact

#### Objectives

#### **1.1 Systems and services are resilient, diverse, and inclusive**

- Systems are public, private and non-profit organizations that are interconnected and work together (e.g., health, education, justice, social care systems).
- The ways that systems function, or fail to function, are often at the root cause of complex, sticky issues.
- Systems can be improved through capacity building, policy change, integration, operational changes, and governance.

#### **1.2 Inspire and nurture social innovation**

- We are helping to build an eco-system that enables people to work together to find novel solutions to problems and scale them up and out.
- Building skills, leading the design of new solutions, and creating new funding mechanisms are all ways United Way is engaging social innovation to improve people's lives.

#### **1.3 United Way and Indigenous communities have a relationship built on trust, respect, and reciprocity**

- United Way's Indigenous Strategy is all about finding ways to work in parallel, honoring both Indigenous ways and Western ways.
- Guided by Indigenous Elders and in close collaboration with Indigenous leaders and organizations, United Way is committed to the healing and well-being of Indigenous people who make their home in Calgary and in the surrounding communities.

#### **1.4 Implementation of a DEI strategy contributes to a community where everyone belongs**

- We recognize that many groups experience systemic discrimination and exclusion that hinders their ability to thrive and participate fully in community.

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- We are starting our journey with a humble and sincere effort to listen and learn.
- We will take action by standing *with* - not *for* - groups that are seeking greater equity in society.

### Goal 2. Establish a Robust Revenue Portfolio Driven by Change-Makers

#### Objectives

##### **2.1 Donor interests are connected to community change**

- Marketing research has demonstrated that our greatest opportunity is to help people to feel connected to community change.
- We will continue to learn about and understand donor interests and tailor communications and experiences to meet their needs.

##### **2.2 Transformational philanthropy is grown**

- Transformational philanthropy is about cultivating long-lasting relationships with people and organizations who deeply share a commitment to United Way's mission.
- Partners in this kind of charitable giving are involved in co-designing large multi-year gifts that will facilitate significant a level of impact that would not be achievable otherwise.

##### **2.3 Corporate partnerships deliver strategic value**

- The needs of employers, employees, and workplaces are evolving.
- We will work with businesses to redesign our offerings to support employee engagement, advance Environmental, Social, and Governance goals (ESG), and help organizations to achieve other business benefits.

##### **2.4 Non-philanthropic resource streams are developed**

- Non-philanthropic revenue includes grants and contributions from governments, foundations and social finance, as well as earned income through social enterprises.
- Building up non-philanthropic resource streams is one way that we will diversify our revenue portfolio for greater long-term sustainability.

### Goal 3. Demonstrate excellence as a trusted, high-performing organization

#### Objectives

##### **3.1 Structures, staff and governance are effective, resilient, and inclusive**

- Continuous improvement in how United Way operates will enhance capabilities, people, and processes.

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- A focus will be placed on culture development and internal diversity, equity, and inclusion.

### **3.2 Our brand is relevant, builds connections, and inspires co-creation**

- “Brand” is what communicates an organization’s identity, personality, and values.
- United Way is adopting a customer-centred approach to understanding and shifting the way that our customers (potential donors, partners, and other funders) see United Way so that we build lasting relationships that meet people’s needs and desires.
- We are also using a new partnership framework to transform how we relate to our community partners to better achieve collaborations that are built on trust and shared value.

### **3.3 United Way has a modern digital and technology infrastructure**

- Digital tools and infrastructure will enable United Way to operate more effectively and efficiently in all aspects of its business.
- We will also focus on harnessing the power of our own data to generate new insights and inform decision making and explore data collaborations that will promote data-informed innovation and improvement across the non-profit sector.

## Strategic Plan Implementation

United Way’s Board of Directors will continue to review and approve an annual Business Plan, Budget, and Risk Control Plan. Regular report-back mechanisms allow for course corrections, immediate response to emerging issues, and the reallocation of resources as needed.

Internally, annual Operations Plans identify the details required to achieve strategies and provides staff with direct line of sight between day-to-day work and strategic priorities.

## Measurement

All plans will include key performance indicators to monitor and report on progress. While operational indicators may change slightly over time, key performance indicators will remain more stable over the course of the strategic plan, enabling the Board to monitor progress against the overall strategic direction.

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### Strategic Plan Key Performance Indicators

- **Total distributions, community programs, and services expenses drawn from the General Fund** reflects the amount of money allocated directly to community impact work whether carried out by United Way employees or funded agencies. Higher amounts reflect more community impact output. In addition to the distributions to community, this amount also includes the TAFRA\* portion the operating support expenses incurred by United Way annually.
- **Net revenue available for distribution from the General Fund** reflects the total money brought in within a given year that could be used for community impact work (annual revenue minus fundraising expenses). This amount does not count the full amount of funds in reserves (Tomorrow Fund) only the number of reserves that are distributed each year. Higher amounts reflect more funds available to put toward community impact.
- **Excess (deficiency) of revenue over expenses with respect to the General Fund** is the difference between the net funds available for distribution and the total distributions metrics described above and is therefore a measure of how effectively the organization can balance the need to invest in operations to remain high functioning and the need to create positive community impact. A very high value either positive or negative would be unsustainable over a long period of time.



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## Appendix 1. Strategic Plan Refresh - Comparative View

The following table offers a comparative view of the 2018-2022 Strategic Plan and the 2023-2027 Strategic Plan (RED indicates changes):

Strategic Plan Section	2018-2022 Strategic Plan	2023-2027 Strategic Plan
<b>Values</b>	Demonstrate trust, integrity, respect, transparency, inclusivity, and diversity.  Lead in an unbiased, evidence-based, and principled way to advance community good for all	No Change
<b>Vision</b>	A resilient and caring community where everyone thrives	No Change
<b>Mission</b>	To mobilize communities for lasting social change	No Change
<b>Value Proposition</b>	We are local experts We bring people together We solve complex social issues  We generate high return on community investment and measure impact	We are local experts who bring people together to solve complex social problems to improve lives
<b>Goal 1</b>	Deepen Community Impact	No change
<b>Goal 1 Objectives</b>	<ul style="list-style-type: none"> <li>The social sector is working together towards common outcomes</li> <li>United Way and Indigenous communities have a relationship built on trust, respect, and reciprocity</li> </ul>	<ul style="list-style-type: none"> <li>Systems and services are resilient, diverse, and inclusive</li> <li>Inspire and nurture social innovation</li> <li>United Way and Indigenous communities have a relationship built on</li> </ul>

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	<ul style="list-style-type: none"> <li>• United Way is a key contributor to a more equitable community</li> <li>• Partnerships are designed to optimize investments in three focus areas</li> </ul>	<p>trust, respect, and reciprocity</p> <ul style="list-style-type: none"> <li>• <b>Implementation of a DEI Strategy contributes to a community where everyone belongs</b></li> </ul>
<b>Goal 2</b>	Inspire Relationships and Generate Resources	<b>Establish a Robust Revenue Portfolio Driven by Change-Makers</b>
<b>Goal 2 Objectives</b>	<ul style="list-style-type: none"> <li>• Donors have great, customized individual experiences</li> <li>• Strategic corporate partnerships are revitalized</li> <li>• Transformational giving is a key focus</li> <li>• Revenue streams are diversified</li> </ul>	<ul style="list-style-type: none"> <li>• Donor interests are connected to community change</li> <li>• Transformational philanthropy is grown</li> <li>• Corporate partnerships deliver strategic value</li> <li>• Non-philanthropic revenue streams are developed</li> </ul>
<b>Goal 3</b>	Demonstrate Excellence as a Trusted High Performing Organization	Demonstrate Excellence as a Trusted High Performing Organization
<b>Goal 3 Objectives</b>	<ul style="list-style-type: none"> <li>• The business model is dynamic to balance human and financial resources</li> <li>• Our reputation as a community impact organization is amplified</li> <li>• The digital and technological experience of United Way is modernized</li> </ul>	<ul style="list-style-type: none"> <li>• Structure, staff and governance are effective, resilient and inclusive</li> <li>• Our brand is relevant, builds connections and inspires co-creation</li> <li>• United Way has a modern digital and technology infrastructure</li> </ul>

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## Appendix 2. Refreshed Strategic Plan Summary

### Vision

A resilient and caring community where everyone thrives

### Mission

To mobilize communities for lasting social change

### Values

- Demonstrate trust, integrity, respect, transparency, inclusivity, and diversity
- Lead in an unbiased, evidence-based, and principled way to advance community good for all

### Value Proposition

We are local experts who bring people together to solve complex social problems to improve lives.

### Goals

1. Deepen community impact
2. Establish a robust revenue portfolio driven by change-makers
3. Demonstrate excellence as a trusted, high-performing organization

### Objectives

- |   |  |  |
|---|--|--|
| 1.1. Systems and services are effective, resilient, representative, equitable and inclusive             | 2.1. Donor interests are connected to community change through a brand that is relevant, builds connections and inspires co-creation | 3.1. Structure and governance are effective, resilient, representative, equitable, and inclusive |
| 1.2. Inspire and nurture social innovation  | 2.2. Transformational philanthropy is grown  | 3.2. United Way has a modern digital and technology infrastructure                               |
| 1.3. United Way and Indigenous communities have a relationship built on trust, respect, and reciprocity | 2.3. Corporate partnerships deliver strategic value  |  |

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1.4. Implementation of a DEI Strategy contributes to a community where everyone belongs

2.4. Non-philanthropic revenue streams are developed

### GLOSSARY

GOALS set the parameters for what the plan is intended to achieve. They represent the creation of a new model that integrates and activates all United Way's considerable assets, connections, and resources to resolve complex social issues and demonstrate the value of United Way.

OBJECTIVES are the check points that tell us if we are on the right track.

STRATEGIES are the means by which we will accomplish our goals.

TACTICS are activities and actions to accomplish these strategies.