

UNITED WAY
NORTHWEST INDIANA
**STRATEGIC
PLAN**



2023
—
2025

H A R N E S S T H E P O W E R

O F C A R I N G

United Way Northwest Indiana Strategic Plan 2023-2025

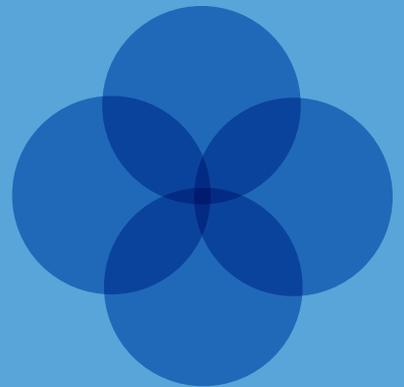


UNITED WAY

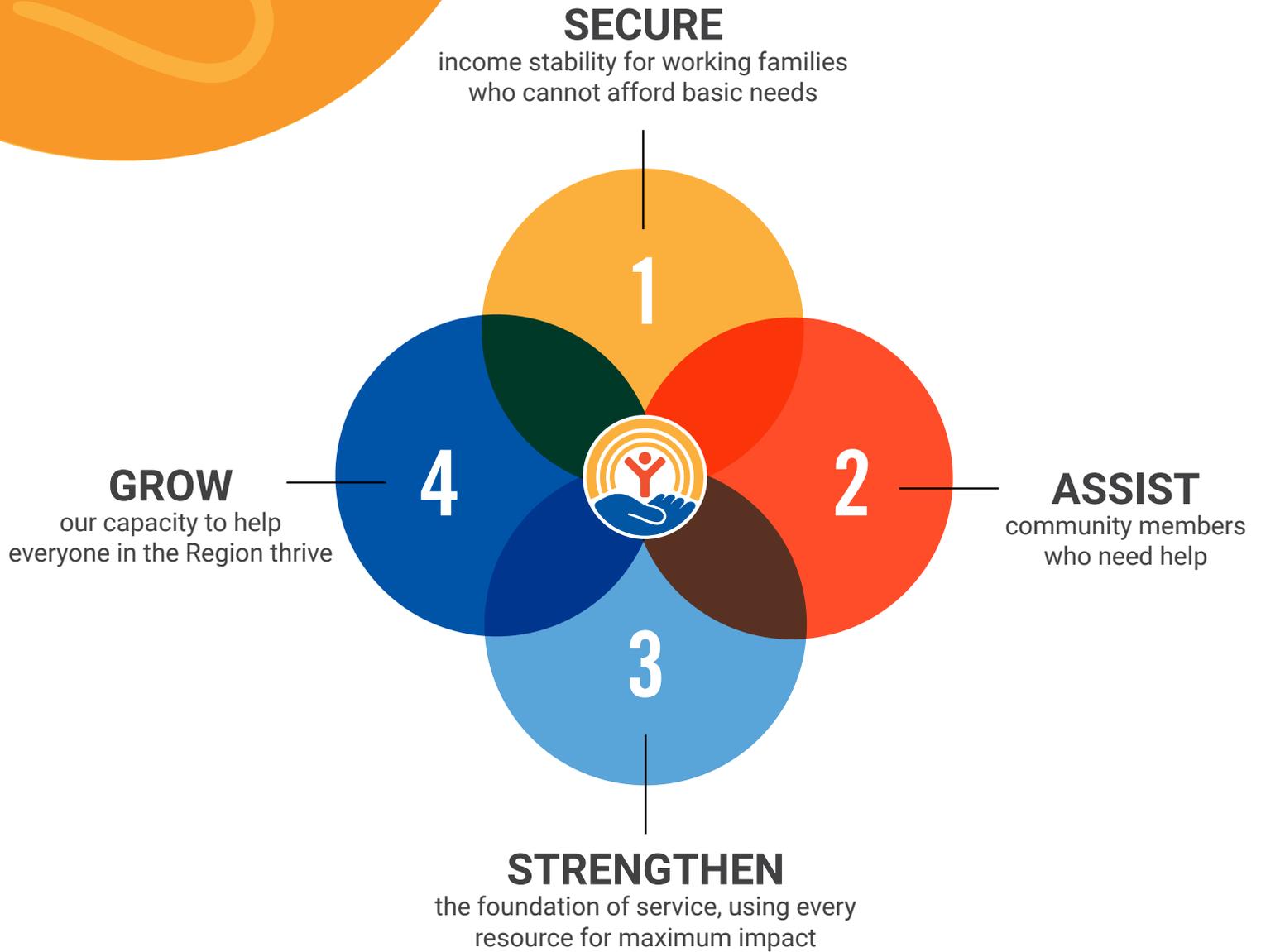
Northwest Indiana

Two local United Ways merged in 2021—Lake Area United Way and United Way of Porter County. Their aim was to build a powerful organization that could rise to face the Region’s challenges today. Under the leadership of our new President and CEO Adam O’Doherty, we gathered extensive data as we embarked on a listening campaign, surveying and speaking with people of all walks throughout the communities we serve. We engaged many citizens, staff members, board leaders, donors and volunteers. We used our findings and a rigorous planning process to determine how we could best use our resources to help people when they need help and tackle root causes to build up lives and livelihoods. We believe everyone in Northwest Indiana deserves the right to thrive. Our new bold plan harnesses the power of caring to make every life in Northwest Indiana better—today and tomorrow.

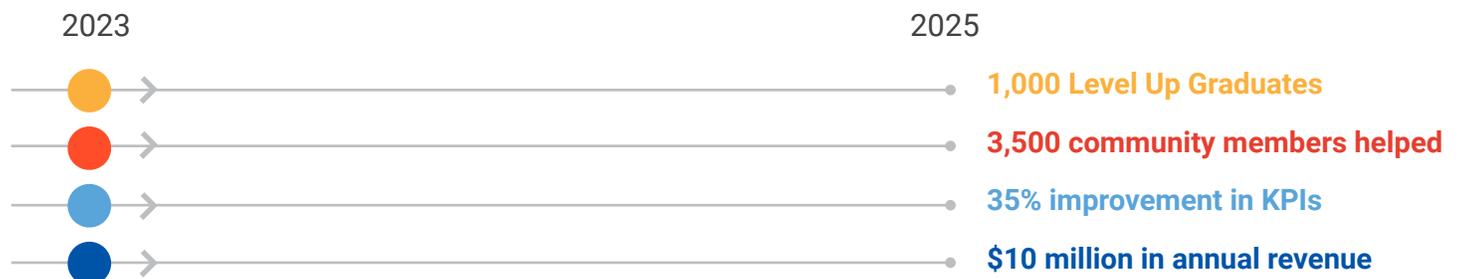
Our mission: to help people thrive and bring our community together to solve the toughest challenges



FOCUS AREAS



PROGRESS



1

SECURE

Reduce the number of NWI households living below financial sustainability levels by producing 1,000 graduates through the Level Up program.

Why:

- Throughout the counties we serve, about 1 in 3 households cannot afford basic needs such as housing, childcare, food, transportation, and healthcare.
- Level Up uses one-on-one mentoring and wraparound services to enhance skills, education and workforce readiness, advancing the earning ability of low-income households.

Steps we will take:

1. Launch a targeted outreach and recruitment effort to reach households in need
2. Create a model for scaling up capacity of the Level Up program
3. Build partnerships with organizations that can rapidly extend the reach and cost-effectiveness
4. Work with corporate partners to assess workforce needs and provide skill building supports to employees
5. Implement a multigenerational approach to set youth on a successful path, partnering with schools and youth organizations
6. Define and establish a dashboard of key finance, participation and outcome metrics; establish a system for data reporting and continuous improvement

2

ASSIST

Guide at least 3,500 community members to the immediate help they need by creating a one-on-one case management and referral service.

Why:

- We receive approximately 1,000 phone calls from neighbors requesting emergency help every year.
- Navigating support services alone can be overwhelming and confusing.
- A request for immediate help is often the tip of an iceberg. A case management approach allows us to solve problems more holistically, reducing the need for future assistance.

Steps we will take:

1. Establish structure and staffing for a new community navigator role built around a case management approach
2. Design job descriptions; build a staffing plan; recruit, hire, and train qualified social workers
3. Promote and advance community awareness through clear messaging and sustained marketing
4. Connect qualified candidates to the Level Up program for even more comprehensive and sustainable change
5. Gather and analyze data on types of assistance needed to inform service development for the nonprofit community
6. Provide targeted supports to nonprofits that extend the ability to meet needs through volunteer management and recruitment
7. Evaluate and as necessary reconfigure our internal program lineup and resource allocation to ensure alignment with defined needs and outcomes
8. Initiate a collaborative impact approach to address root causes of community challenges
9. Define and establish a dashboard of key financial, participation and outcome metrics; establish a system for data reporting and continuous improvement

3

STRENGTHEN

Refine and strengthen our operational foundation, ensuring we operate with efficiency and effectiveness, accountable to all, demonstrating at least 35% improvement in Key Performance Indicators.

Why:

- United Way Northwest Indiana is a steward of the Region's trust and financial support. Using every resource efficiently and effectively is essential to our mission.
- Our bold plan requires major operational alignment to create a solid foundation for making an impact.

Steps we will take:

1. Align board, staff, volunteers and community around a common purpose
2. Assess and reinvent systems and processes throughout the organization to eliminate unnecessary tasks and create the structure needed to achieve strategic priorities
3. Advance the role and structure of the board of directors to be an asset to the organization
4. Assess and strengthen our use of technology, applying best-fit tools to improve productivity and effectiveness
5. Assess and strengthen financial systems, applying best-fit tools to understand and maximize our use of financial resources
6. Use tools and metrics to be fully data driven and accountable, reporting to the community on performance and impact
7. Define workflows, job descriptions, accountability model, and organization-wide staffing plan to align with the strategic plan
8. Recruit, train and mentor qualified team members to be successful in their roles
9. Foster an engaged, excited and collaborative team culture that generates results
10. Define and adopt Key Performance Indicators; establish baseline and accountability system, with a system for data reporting and continuous improvement

4

GROW

Increase annual revenue to \$10 million.

Why:

- The need in Northwest Indiana is great.
- Growing financial resources allows us to scale and grow impact throughout the Region.

Steps we will take:

1. Refine and expand our public communications and outreach with clear messaging and frequent touch-points across all media to engage a broader audience
2. Provide transparency into what we do, how we do it, and what we achieve
3. Restructure fundraising efforts with a specific plan to engage donors and supporters with our mission and goals
4. Define development roles and scale up team appropriately
5. Identify and pursue expanded funding sources via grants and other resources
6. Define donor data points and tools needed to maintain meaningful communications with diverse supporters
7. Expand relationships with donors and corporations throughout Northwest Indiana
8. Implement a major gifts program
9. Define and establish a dashboard of key metrics; establish a system for data reporting and continuous improvement



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DIVERSITY, EQUITY AND INCLUSION

United Way Northwest Indiana is a place where people of many backgrounds and perspectives come together, unified in a common vision to make our community better. The strength of this diversity and the spirit of inclusion are what makes our community strong and unique. We offer residents a place to unite in a common vision to better their community.



unitedwaynwi.org

info@unitedwaynwi.org

