

Head of the Lakes

The background of the page is a scenic landscape photograph. It shows a calm body of water in the foreground, reflecting the sky and the surrounding forest. The middle ground is dominated by a dense, lush green forest of various trees, including tall evergreens and deciduous trees. The sky is a clear, pale blue. The entire scene is framed by a thin white border.

**STRATEGIC PLAN**  
2021-2025

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## EXECUTIVE SUMMARY

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Beginning in August 2021, Head of the Lakes United Way (HLUW) engaged Northspan to conduct a strategic planning process. The goals of the process were to clarify and/or identify the following:

- Strategic Directions for next 5 years
- Accomplishments by which the strategic directions are achievable
- Mission, Vision, and Core Values

HLUW, over the course of three 3-hour sessions and a follow-up 1.5-hour session, defined the following mission, vision, core values, and strategic directions:

### Mission:

To strengthen our communities by uniting people and resources.

### Vision:

To improve the health, education, and financial stability for every person in every community we serve.

### Core Values:

- 1. Community-led.** We recognize that our efforts must reflect the needs of the people we serve and work with them to develop solutions to the challenges we collectively face.
- 2. Inclusive.** We are committed to intentional outreach to diverse groups and seek to overcome longstanding barriers to equitable outcomes in our communities and systems. .
- 3. Engaged.** We remain in tune with the community and build connections to guide processes of community-led change.
- 4. Sustainable.** We work to ensure consistency in our operations and provide reliable, positive contributions to our partners and communities.
- 5. Transformative.** We creatively seek new approaches to the barriers faced by the people we serve and aspire to lasting change for our communities.
- 6. Integrity.** We are uncompromising in our morals and ethics and recognize that they are essential to maintain the trust of both our donors and partner agencies.

### Strategic Directions:

1. Implementing clear goals & expectations to strengthen & develop the organization
2. Actively building relationships to directly connect with individual donors
3. Developing a focus for community-led change
4. Developing clear, consistent messaging to create community understanding & engagement

This document provides an overview of the new strategic plan, which will guide HLUW's work for the next five years. Details on the planning process and supporting documents from that process are available in the appendices.

## OVERVIEW

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Head of the Lakes United Way (HLUW) is a nonprofit dedicated to providing support for health and human services in the Head of the Lakes region of northeast Minnesota and northwest Wisconsin. It formed in 1922 as the Duluth Community Fund and has undergone several name changes and expansions over the past century, culminating in a merger with the United Way of Superior-Douglas County in 2015 to become Head of the Lakes United Way. Its current reach includes southern St. Louis, Lake, and Cook Counties in Minnesota; and Douglas, Ashland, and Bayfield Counties in Wisconsin. While its name, service area, and philanthropic priorities have shifted over time, the group has retained a core focus on fundraising and volunteer coordination to support community members in areas such as education, financial stability, health, and basic needs.

As of the completion of the strategic planning process, HLUW had ten staff members. A 22-member board of directors guides the organization. It has partnerships with companies, nonprofits, organized labor, and sponsors that allow a broad reach for both fundraising and provision of services through partner agencies. The organization maintains a connection to United Way Worldwide, which provides a framework for its operations.

Against this backdrop, HLUW sought to complete a strategic plan to guide its activities from 2021-2025. The new strategic plan seeks to bring together many of the organization's activities behind a common vision and provide concrete, measurable steps with which to make the vision a reality.

## BACKGROUND INFORMATION

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Head of the Lakes United Way serves a unique role in the philanthropic community of northeast Minnesota and northwest Wisconsin. It serves as a vital connector between donors and recipients of aid and has a broad reach, providing funding to over 50 organizations annually. In 2017 and 2018, the most recent years for which data is available, the organization enabled the distribution of over 2,000,000 pounds of food, 200,000 articles of clothing, provided over 50,000 nights of shelter, served over 10,000 children, assisted over 10,000 people with financial assistance services, and helped provide health care access to over 15,000 people annually. Its longstanding model creates a recognizable brand for charitable giving, and the organization has collected extensive anecdotes on the value it brings to community members in need.

The HLUW service area is home to over 200,000 residents, and the region's population is older, has higher unemployment rates, higher poverty rates, a lower median household income, and lower levels of post-secondary education than the state of Minnesota. Its racial disparities in unemployment and poverty are significant, with Black and Native American residents nearly three to four times more likely to fall into these categories.

While the situation is nuanced, the region also tends to lag in many health indicators. The region's statistics do tend to match those of the state of Wisconsin, and many of the indicators, while lagging, have shown some signs of improvement over the past decade.

Recent years have brought considerable change to HLUW. The arrival of numerous new staff members creates opportunities to re-envision certain roles and think creatively about how to best meet the organization's needs. Shifting donor behavior and broader societal awareness around the importance of diversity, equity, and inclusion of community voices have created new areas of discussion and opened possibilities for new orientations. As with many organizations, the Covid-19 pandemic disrupted operations and forced HLUW to think anew about how to achieve its outcomes.

## STRATEGIC PLAN 2021-2025

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This strategic plan is the culmination of a planning process conducted in August and September 2021. The planning established a new vision, mission, core values, and strategic directions for HLUW. It also established action steps and outcomes to advance the strategic directions.

### **Mission:**

To strengthen our communities by uniting people and resources.

### **Vision:**

To improve the health, education, and financial stability for every person in every community we serve.

### **Core Values:**

- 1. Community-led.** We recognize that our efforts must reflect the needs of the people we serve and work with them to develop solutions to the challenges we collectively face.
- 2. Inclusive.** We are committed to intentional outreach to diverse groups and seek to overcome longstanding barriers to equitable outcomes in our communities and systems. .
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## Strategic Directions:

1. **Implementing clear goals & expectations to strengthen & develop the organization**
2. **Actively building relationships to directly connect with individual donors**
3. **Developing a focus for community-led change**
4. **Developing clear, consistent messaging to create community understanding & engagement**

### SD1

## IMPLEMENTING CLEAR GOALS & EXPECTATIONS TO STRENGTHEN & DEVELOP THE ORGANIZATION

### Definition:

This strategic direction recognizes the importance of clear internal processes for the recruitment and retention of employees. It strives to create a culture of engagement for both board members and staff so that all members of the organization understand each other's roles and can coordinate their efforts. Development of clear plans will allow staff to grow and improve in their roles, thereby strengthening the entire organization.

### Action Steps

1. Reformulate purpose and agenda for consistent weekly staff check-ins that feeds board reporting
2. Create & clarify what a consistent working board culture means with the board, examples: calendar sign-up for volunteering, donating, etc.
3. Develop annual performance goals and set year-end review and professional development planning for staff & leadership
4. Facilitate the board in creating committee charges for each committee: Executive, Governance, Finance, Campaign
5. Create a policies and procedures manual to clarify staff & board expectations, including training on the manual
6. Create a regular board report process
7. Work plans for all teams across the organization

### Outcomes

- Increased donor giving
- Consistent & utilized training model for all positions
- Consistent onboarding and a deeper understanding of employee's positions
- Increased team satisfaction
- Increased tenure, less turnover
- All staff would have a greater understanding of all roles in the organization, creating stronger understanding and empathy
- Higher volume of board volunteer participation

**Definition:**

This strategic direction centers on the organization's fundraising efforts. It develops new avenues for giving and seeks to increase the frequency and financial success of specific campaigns. It reacts to broader trends and engages donors with outreach that resonates with their interests in giving to United Way.

**Action Steps:**

1. Keep finger on the pulse for giving during extra money time periods, e.g., when people get their tax returns or stimulus money
2. Create consistent money-making events
3. Create non-traditional giving avenues
4. Develop affinity groups with clear leave-behinds for workplaces, e.g., retirees
5. Create opportunities for staff, board members, and donors to learn about their impact (e.g., bus tours to agencies that explain what they do and how HLUW benefits them)
6. Increase number of consistent retail roundups with incentive to participate (e.g., Cashwise Liquor, Super One, Whole Foods Coop)

**Outcomes:**

- Increased number of individual donors
- Increased giving as a whole
- Increased number of workplace campaigns
- Better knowledge & higher utilization of the donor database, including workplaces and individuals
- Higher donor retention in workplaces and individuals
- Consistent money-making events: every event should be monetized, at minimum breakeven
- Increased engagement with targeted cohorts / affinity groups, e.g., youth & elders, BIPOC communities, veterans, realtors, attorneys

**Definition:**

This strategic direction reflects a renewed commitment to working with partners and clients to ensure funds raised by United Way meet community needs. It brings community members into the fund allocation process and conducts direct outreach to understand how these funds affect the people who ultimately benefit from them. It relies on best practices research to explore new ways to conduct this engagement work and strives to make United Way increasingly responsive to the communities it serves.

**Action Steps:**

1. Develop processes with community input for fundraising and allocation
2. Research and implement evidence-based models for thriving communities and best practices based on other United Ways and similar organizations
3. Re-implementing community panels for outside ideas on processes
4. Meet regularly with organizations and their stakeholders, including clients, by conducting intentional outreach (don't expect them to come to us)
5. Develop metrics for engagement and outcomes and consistently assess progress

**Outcomes:**

- Meet funding goals
- Programs invested in generate measurable, meaningful results
- Expanding, actively engaged relationships with volunteers, donors, and community partners
- Clear funding strategy and process in place
- Clear process is communicated to donors to show impact
- Work will build on community assets and strengths to leverage those strengths



# SD4

## DEVELOPING CLEAR, CONSISTENT MESSAGING TO CREATE COMMUNITY UNDERSTANDING AND ENGAGEMENT

### Definition:

This strategic direction seeks to expand awareness of United Way's mission, activities, and impact. It incorporates both branding and marketing efforts to tell a fresh story about the organization and implements continuous updates through annual marketing plans. This increase in transparency and clarity strives to drive increased engagement with United Way, ultimately resulting in greater revenue.

### Action Steps:

1. Revamp online presence (website, social media)
2. Develop and measure baseline for communications and marketing data and track it quarterly
3. Building effective yearly marketing plans
4. Develop stability and define communication processes for continuity
5. Create a stable, consistent program for community engagement
6. Generate concepts for awareness to accept and generate online revenue
7. Incorporate strategies to reach untapped donors in marketing plans
8. Adopt different communication strategies tailored to different audiences

### Outcomes:

- Strong community engagement with target audiences
- Engagement leads to an increase in revenue
- Brand is better recognized and understood
- Increase in community partnerships for HLUW
- Organizational transparency to strengthen community relationships; easy access to information on how things work
- Internal and external understandings of HLUW work are more aligned
- Successful online platforms with engagement (e.g., website, social media, augmented reality)

# APPENDICES

## ATTACHED

1. Strategic Planning Process
2. Final HLUW Community Informed Survey Summary 8.13.21
3. HLUW Current Reality & SWOT Mini Survey Summary 8.27.21
4. HLUW PV UC SDs Workshops 8.3 – 8.25 – 8.30.21
5. HLUW Current Reality, Success Indicators & Accomplishments 8.30.21
6. HLUW Strategic Plan Timeline 8.30.21
7. HLUW Vision, Mission, Core Values Mini Summary 9.10.21

## **STRATEGIC PLANNING PROCESS**

Head of the Lakes United Way has prepared this 5-year strategic plan to guide its activities and achieve accomplishments consistent with the group's vision and mission. The strategic process steps, session dates, and agendas are included as an attachment, as are the results of the sessions that followed.

### **PROCESS STEPS**

1. Collection of background information
2. Environmental scan survey with staff, board, and identified stakeholders
3. 08.03.21 Strategic Planning Session 1 of 4
4. 08.25.21 Strategic Planning Session 2 of 4
5. 08.30.21 Strategic Planning Session 3 of 4
6. 09.13.21 Strategic Planning Session 4 of 4
7. 09.15.21 Draft Strategic Plan Review & Feedback
8. 09.28.21 Strategic Plan Board Presentation
9. Complete a 90-day check-in
10. Subsequent quarterly and annual planning

### **COLLECTION OF BACKGROUND INFORMATION**

The strategic planning process began with a series of meetings and communications with Head of the Lakes United Way staff that provided contact information, materials detailing the organization's work and impact, and clarification over the plans for the engagement. This phase also included the collection of background demographic, economic, and health-related data from the US Census American Community survey to provide an overview of the current situation and recent trends in the HLUW service area. Combined with some of the impact-defining materials and the results of the environmental scan survey, this information was included in a context-grounding presentation in the first strategic planning session.

### **ENVIRONMENTAL SCAN SURVEY**

Head of the Lakes United Way solicited input from staff, board members, strategy committee members, and agency partners in a survey in July and August 2021. The survey was sent to 151 individuals and received 73 responses. Participants were asked to share their opinions on the organization's existing vision, mission, and value statements, brainstorm ideas for the practical vision for the strategic planning project, and solicited opinions on overall economic and social wellbeing in the HLUW service area. Full results of the survey are available in the appendix titled Final Community Informed Survey Summary 8.13.21.

## **PRACTICAL VISION** STRATEGIC PLANNING VIRTUAL SESSION

**AGENDA | August 3, 2021 | 11:00AM - 2:00PM**

*Zoom will open at 10:45AM*

- 11:05 Welcome, Zooming In & Introductions
- 11:25 Demographic & Economic Trends Analysis
- 11:45 Vision, Mission & Core Values Review
- 11:50 United Way Impact & Survey Considerations
- 12:05 BREAK
- 12:20 Practical Vision Workshop
- 1:55 Next Steps
- 2:00 Adjourn

## **UNDERLYING CONTRADICTIONS & STRATEGIC DIRECTIONS** STRATEGIC PLANNING VIRTUAL SESSION

**AGENDA | August 25, 2021 | 9:00AM - 12:00AM**

*Open Zoom space at 5:45PM*

- Zoom will open at 8:45AM
- 9:03 Welcome, Zooming In & Introductions
- 9:08 Survey Update
- 9:10 Underlying Contradictions
- 10:30 5-Minute BREAK
- 10:35 Strategic Directions
- 11:58 Next Steps
- 12:00 Adjourn

On August 23, Northspan facilitated a strategic planning session with the HLUW strategy committee that focused on blocks that prevent the organization from reaching its vision and strategic directions to overcome those blocks and barriers.

### **Underlying Contradictions aka Blocks**

Participants identified five contradictions or blocks that they believed held back HLUW. These blocks are available in the appendix in the document titled HLUW PV UC SDs Workshops 8.3 – 8.25 – 8.30.21.

### **UNDERLYING CONTRADICTIONS**

1. Traditional models limit consistent, diverse funding sources
2. Unfocused engagement impedes relationship building in community
3. Unclear roles and limited training create barriers to a healthy, engaged organization
4. Inconsistent communication, processes, and strategies limit collaboration and inclusion
5. Narrow board definition and roles lead to underutilization and undiversified representation

## Strategic Directions

With the contradictions in mind, the participants then moved to identify four strategic directions that they believe will allow HLUW to overcome these blocks. These strategic directions are available in the appendix in the document titled HLUW PV UC SDs Workshops 8.3 – 8.25 – 8.30.21.

### **STRATEGIC DIRECTIONS**

1. Implementing clear goals & expectations to strengthen & develop the organization
2. Actively building relationships to directly connect with individual donors
3. Developing a focus for community-led change
4. Developing clear, consistent messaging to create community understanding & engagement

## **FINISH & CONFIRM STRATEGIC DIRECTIONS AND FOCUSED IMPLEMENTATION** STRATEGIC PLANNING VIRTUAL SESSION

### **AGENDA | August 30, 2021 | 9:00AM - 12:00PM**

*Zoom will open at 8:45AM*

- 9:03 Welcome, Zooming In & Introductions
- 9:08 Current Reality & SWOT Overview
- 9:13 Finish & Confirm Strategic Directions
- 9:45 Focused Implementation
  - Current Reality, Success Indications, Accomplishments
  - Timeline
  - Priority
- 11:58 Next Steps
- 12:00 Adjourn

On August 30, Northspan facilitated a third workshop with the HLUW strategy committee. In this session, participants completed the naming of the strategic directions identified in the previous session and detailed outcomes and accomplishments that could move HLUW toward its strategic directions. To prepare for the session, participants completed a brief survey on the organization's current reality on the strengths and weaknesses of the team, along with the benefits and dangers of success of the strategic plan. The survey asked respondents to identify HLUW's strengths, weaknesses, opportunities, and threats. The results of this survey are available in the appendix titled HLUW Current Reality & SWOT Mini Survey Summary 8.27.21.

## **Accomplishments**

HLUW defined its current reality, identified success indicators, and developed outcomes and accomplishments that will allow the organization to move from current reality to success. These accomplishments and the ideas that led to their creation are available in the appendix in the document titled HLUW Current Reality, Success Indicators & Accomplishments 8.30.21 HLUW then further defined the strategic plan timeline, which is available in the appendix titled HLUW Strategic Plan Timeline 8.30.21.

## **MISSION, VISION, & CORE VALUES** STRATEGIC PLANNING VIRTUAL SESSION

**AGENDA | September 13, 2021 | 2:00PM - 3:30PM**

*Zoom will open at 1:45PM*

2:00 Welcome, Zooming In & Introductions

2:05 Mission

2:25 Vision

2:55 Core Values

3:30 Next Steps & Adjourn

In the final session, the strategy committee revisited the organization's mission, vision, and core values. While HLUW had existing language for all three components, the initial survey revealed varying levels of satisfaction with it, and participants workshopped each of them to retain certain core ideas while better reflecting the organization's activities and goals. An initial mini survey of the strategy committee that helped guide this conversation is available in the appendix titled HLUW Vision, Mission, Core Values Mini Summary 9.10.21.

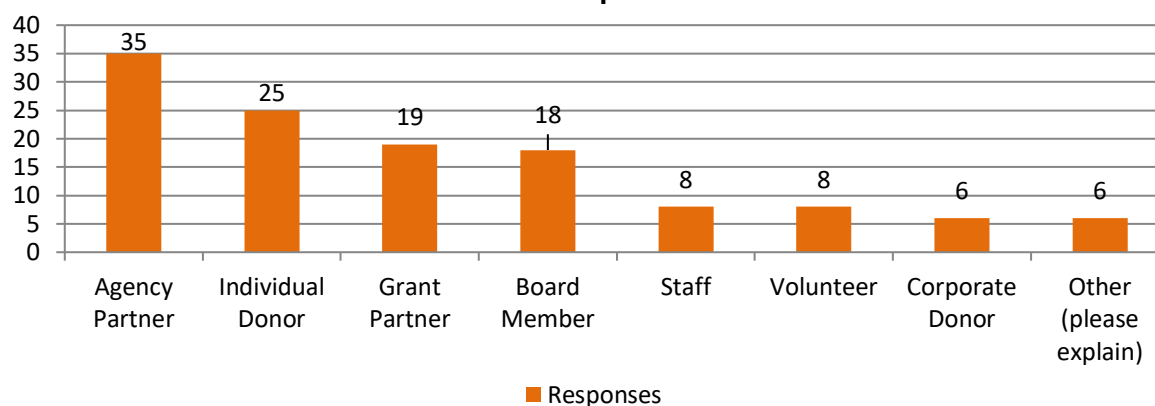


In preparation for the strategic planning sessions, Northspan conducted a community informed survey. The survey was e-mailed directly to participants and was open from July 30, 2021 to August 12, 2021. Respondents consisted of staff members, board members, strategy committee members, as well as other agency partners. This survey covered a range of topics, including vision & mission, value statement, practical vision brainstorming and finishing with a series of questions around the overall economic wellbeing of the service area.

#### RESPONDENTS

The survey was distributed via e-mail to 151 individuals and received 73 responses. Participants were asked to self-identify their association with HLUW, responses are shown in the chart below. Other responses primarily included recipients of HLUW funding, committee members of other partner agencies, and a former employee.

**Head of the Lakes United Way - Community Informed Survey  
Participants**



#### VISION & MISSION

The next section of the survey asked participants to provide feedback on the current vision and mission statements, and whether those statements are still relevant:

## Vision

***"To be the recognized leader in engaging and equipping our communities to eliminate the greatest challenges we face."***

- **Is this the statement you recognize as the vision statement?**
  - Yes - 59%
  - No - 41%
- **Do you feel that this vision statement is still relevant?**
  - Yes - 64%
  - No - 36%
- **If not, please explain** (Received 24 responses to this prompt, summarized and grouped below):
  - **9 responses: Wording "Leader"**
    - *Too agency focused, not community focused, should be about leveraging partnerships and power sharing*
  - **7 responses: Overall Unclear**
    - *Hard to decipher, lacks direction, seems grandiose, intentionally vague*
  - **5 responses: General refinement needed to better reflect work HLUW is doing**
    - *It isn't reflective of the work being done, needs to be revisited...to reflect current goals and mission*
  - **4 responses: Not familiar with this vision statement**



### Mission

*“Uniting caring people and mobilizing resources to empower individuals and strengthen communities.”*

- **Is this the statement you recognize as the mission statement?**
  - Yes - 93%
  - No - 7%
- **Do you feel this statement is still relevant?**
  - Yes - 91%
  - No - 9%
- **If not, please explain** *(Received 8 responses to this prompt, summarized below)*
  - Caring is a good word, but we are more than that.
  - Would suggest "Uniting caring people by mobilizing resources to strengthen communities."
  - Commitment to DEI should be included
  - If "uniting people" is through raising donor funding, than it's relevant. If we are talking about "uniting people" to gather around a movement or cause, then I do not see the relevance.
  - I think it needs to be updated.
  - Should be simpler to have a larger reach and an easier understanding for more people.
  - I think United Way's greatest strength is mobilizing resources, whether that be money or volunteers
  - More systemic approach is needed

### VALUE STATEMENTS

The Head of the Lakes United Way created and is using three value statements. Survey participants were asked to assess if these statements should continue being used. If choosing maybe or no, they were asked to explain. Comments have been summarized.

| Value Statement                     | Yes | Maybe | No  | Comments:  |
|-------------------------------------|-----|-------|-----|--|
| <b>Changing and Improving Lives</b> | 80% | 13%   | 7%  | <ul style="list-style-type: none"> <li>• Does not address systemic and/or institutional barriers</li> <li>• Similar to other Agency statement</li> <li>• Could be stronger</li> </ul>  |
| <b>A Leader and Partner</b>         | 60% | 30%   | 10% | <ul style="list-style-type: none"> <li>• Use of the word “leader” – feels uninvolved, are we living up to that?</li> <li>• Comments regarding HLUW serving more as partner than leader</li> </ul>  |
| <b>Working Together for Results</b> | 74% | 22%   | 4%  | <ul style="list-style-type: none"> <li>• “Not even remotely inspiring”</li> <li>• Better communication with partners and empowering communities served</li> <li>• Suggested changes: building capacity, strengthening social wealth, achieve positive results</li> </ul> |

### PRACTICAL VISION

In this section, respondents were asked to provide 3-5 ideas addressing the question: ***What do you want to see in place in 5 years as a result of our strategic planning actions?*** Participants provided 190 total responses, which have been categorized below.

| Theme                | Number of Responses |
|----------------------|---------------------|
| HLUW operations      | 39                  |
| Enhance partnerships | 36                  |



## APPENDIX 2

### HEAD OF THE LAKES UNITED WAY (HLUW) COMMUNITY INFORMED SURVEY | AUGUST 13, 2021



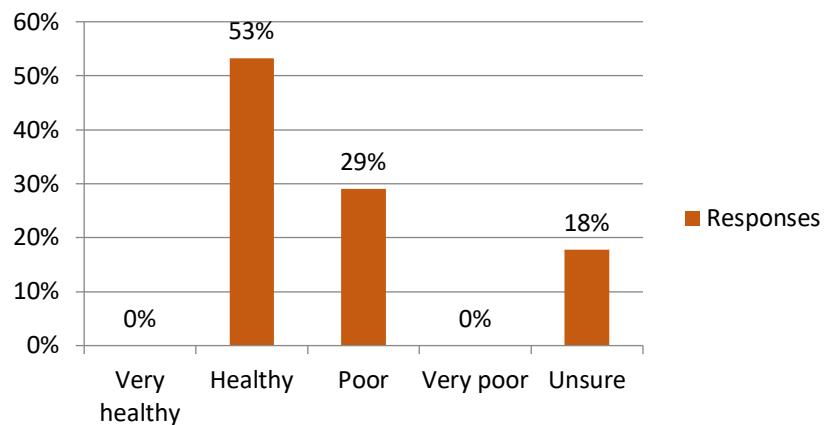
|   |    |
|---|----|
| Expand and stabilize program funding                              | 25 |
| Focused efforts on DEI  | 21 |
| Clear, effective marketing for HLUW showing impact in communities | 21 |
| Increase community engagement                                     | 20 |
| Addressing homelessness and poverty                               | 18 |
| Support programming for youth                                     | 10 |

#### ADDITIONAL CONSIDERATIONS

The final section of the survey had participants consider the overall economic health, employment opportunities, support systems, education, and health outcomes for communities within the HLUW's service area.

Slightly over half (53%) of those surveyed rated the overall health of the region as healthy, while 18% expressed feeling unsure. Twenty-nine percent (29%) assessed the region's economic health as poor.

#### How would you rate the overall economic health of the Head of the Lakes region?



| Topic   | Very satisfied | Satisfied | Dissatisfied | Very dissatisfied | Unsure |
|---|----------------|-----------|--------------|-------------------|--------|
| Employment opportunities                        | 3%             | 48%       | 35%          | 2%                | 11%    |
| Support system and ability to serve basic needs | 5%             | 55%       | 32%          | 0%                | 8%     |
| Education system                                | 5%             | 55%       | 25%          | 2%                | 13%    |
| Health outcomes                                 | 2%             | 50%       | 35%          | 2%                | 11%    |

The survey concluded by asking participants two open ended questions. A sample of responses is shown below.

#### How can the Head of the Lakes United Way promote giving more broadly?

- Engaging with the community more
- Be more consistent in messages and marketing
- Begin to target the entire community, not just workplaces, in our fundraising efforts
- Increased educational and marketing initiatives across a wide variety of platforms and differing communities
- Expand reach outside of stereotypical workplace campaigns and engage with all varieties of workplaces. For example, sole proprietors, contract employees, small businesses, those that work on commission and those that work seasonally
- A better outreach to retirees and youth
- Making that connection to WHY it matters, the positive and powerful outcomes that are possible when people mobilize and come together for their community
- Sharing stories of the needs within our communities
- Increase digital and social media marketing efforts

#### Any additional thoughts or considerations for the Head of the Lakes United Way as it undertakes its strategic planning process?

- Make sure that the strategic plan is reasonable and doable. Words and plans need action behind them
- My biggest issue with this organization is that the board does not reflect or represent the community we serve
- Listening sessions - with the organizations HLUW funds, with other community organizations, and community members
- HLUW should strive to become much more visible in the community
- There is a history of an uncomfortable work environment and tensions between staff and management. More participation and enthusiasm from the board could be beneficial
- I think you need a better understanding of the issues faced by BIPOC communities in our region and why there is such a lack of significant support for issues facing BIPOC individuals and families
- Identify gaps in the community gaps and fill those gaps instead of duplicating efforts

## APPENDIX 3

HEAD OF THE LAKES UNITED WAY  
CURRENT REALITY AND SWOT MINI-SURVEY SUMMARY  
AUGUST 27, 2021



### BACKGROUND

This survey gathered strategy committee input on the Head of the Lakes United Way's Current Reality, grounded in the work completed in the first two workshops, and an organizational SWOT. In the first two workshops, committee members worked through setting an aspirational practical vision, analyzing underlying contradictions, and nearly completed the creation of their strategic directions.

### PRACTICAL VISION | What we want to see in place in five years as a result of our actions?

- Community-Driven Results
- Healthy, Engaged Organization
- Community-Powered Contribution Drive
- Effective, Clear Marketing
- Integrated, Intentional Diversity, Equity & Inclusion

### UNDERLYING CONTRADICTIONS | What may be blocking us or holding us back from moving toward your Practical Vision?

- Unfocused engagement impedes relationship building in community
- Unclear roles & limited training create barriers to a healthy, engaged organization
- Traditional models limit consistent, diverse funding sources
- Inconsistent communication, processes, and strategies limit collaboration and inclusion
- Narrow board definition and roles lead to underutilization and undiversified representation

### STRATEGIC DIRECTIONS *(So close, to be finalized and confirmed on Monday, August 30th @9:00AM)* | What innovative, substantial actions, programs or efforts can our board or staff do, create, or take on that will address our blocks and move us toward our Practical Vision?

1. Implementing clear goals & expectations to strengthen & develop the organization
2. Actively building relationships to directly connect with individual donors
3. Expanding capacity for community-led change
4. Communications & marketing

# APPENDIX 3

HEAD OF THE LAKES UNITED WAY  
 CURRENT REALITY AND SWOT MINI-SURVEY SUMMARY  
 AUGUST 27, 2021



## CURRENT REALITY

Participants were first asked to examine HLUW’s **current reality** and identify Strengths, Weaknesses, Benefits, and Dangers that are grounded in the group’s ability to work toward its Practical Vision.

| Head of the Lakes United Way • Current Reality   |   |
|--|---|
| <p><b>Strengths:</b> <i>What are our strengths as a team?</i></p> <ul style="list-style-type: none"> <li>• Staff – passionate, caring, fresh ideas, enthusiasm, motivated</li> <li>• DEI work</li> <li>• Addition of marketing and impact director positions</li> <li>• Working with Audacity HR</li> <li>• Open to hear other viewpoints</li> <li>• Organization fosters positive community relationships</li> <li>• Results focused/measured</li> </ul>  | <p><b>Weaknesses:</b> <i>What are our weaknesses as a team?</i></p> <ul style="list-style-type: none"> <li>• Dated fundraising model</li> <li>• Lack of diversity within staff</li> <li>• Lack of organizational clarity and structure for both staff and board members</li> <li>• Ineffective use of community needs related data</li> <li>• Entrenched ideas/perceptions may inhibit growth</li> <li>• A community unsure of HLUW’s focus and impact</li> </ul> |
| <p><b>Benefits:</b> <i>What benefits will our success bring?</i></p> <ul style="list-style-type: none"> <li>• A well-resourced human services sector</li> <li>• Opportunity for abundance of new diverse partnerships and connections</li> <li>• Rise of youth and younger generation demographic engagement</li> <li>• Increased funding for current agencies and those yet to be funded</li> <li>• Recognition as a leading force for good in our community</li> <li>• Clearer understanding of job duties</li> <li>• Seen as a partner to agencies in the community - the go to for things</li> </ul> | <p><b>Dangers:</b> <i>What obstacles or dangers do we anticipate confronting when we are highly successful?</i></p> <ul style="list-style-type: none"> <li>• Neglect of rural communities</li> <li>• Politicization</li> <li>• Shifting/loss of donors</li> <li>• Staff burnout</li> <li>• Complacency/stagnation</li> <li>• United Way Worldwide restrictive policies</li> <li>• Increased arrogance leading to decreased listening</li> </ul>                   |



## SWOT ANALYSIS

Next, participants were asked to complete an organizational **SWOT**. This required respondents to analyze Strengths, Weaknesses, Opportunities, and Threats related to Head of the Lakes United Way at an organizational level.

| Head of the Lakes United Way • SWOT Analysis  |   |
|---|---|
| <p><b>Strengths:</b> <i>Internal factors that give our organization an advantage over others</i></p> <ul style="list-style-type: none"> <li>• Supported by a national and state organization</li> <li>• A well-known name – nationwide presence</li> <li>• 100 years of organizational history, being in Duluth, MN</li> <li>• Motivated and mission-driven employees</li> <li>• Relationship with labor unions</li> <li>• A large service area</li> <li>• Common desire for positive impact in our community</li> </ul>  | <p><b>Weaknesses:</b> <i>Internal factors that place our organization at a disadvantage relative to others</i></p> <ul style="list-style-type: none"> <li>• Lack of understanding of community needs</li> <li>• Overreliance on a small number of large corporate donors</li> <li>• Inconsistent execution strategies surrounding alignment, culture, and capacity</li> <li>• Slow adoption of technology tools</li> <li>• Relatively non-diverse board</li> <li>• Lack of presence in all Communities we serve</li> <li>• Outdated Policies and Procedures</li> <li>• Need to recognize that one way approach may not work in all communities</li> </ul>   |
| <p><b>Opportunities:</b> <i>External factors that our organization could capitalize on to our advantage</i></p> <ul style="list-style-type: none"> <li>• Opportunity to be a leader in changing the fundraising structure</li> <li>• Grow donor database</li> <li>• Intentional rural outreach</li> <li>• Opportunity to be a leader in diversity, equity, and inclusion in our community</li> <li>• Donation growth potential with current/past donor/partner businesses</li> <li>• Re-evaluate staff positions</li> <li>• Increase in donor, board, and volunteer participation</li> <li>• Create a community presence (Either through programs or general events)</li> </ul> | <p><b>Threats:</b> <i>External factors that could create challenges for our organization</i></p> <ul style="list-style-type: none"> <li>• Online Fundraising (Hurts our traditional/ Legacy Model)</li> <li>• Widening social inequality in communities served</li> <li>• Covid-19</li> <li>• Partisanship leading to opposition</li> <li>• Low positive brand recognition within local regions and beyond</li> <li>• Many demands for fundraising dollars</li> <li>• Ongoing UWW turmoil</li> <li>• Competition from other non-profits</li> <li>• Competitive job markets (Unappreciated staff can easily find another position)</li> <li>• Challenging landscape to hire employees and recruit Board members</li> </ul> |

*Practical Vision Workshop 08.03.21*

*Underlying Contradictions & Strategic Directions Workshop 08.25.21 & 08.30.21*

**PRACTICAL VISION** | *What we want to see in place in five years as a result of our actions?*

- Community-Driven Results
- Healthy, Engaged Organization
- Community-Powered Contribution Drive
- Effective, Clear Marketing
- Integrated, Intentional Diversity, Equity & Inclusion

**UNDERLYING CONTRADICTIONS** | *What may be blocking us or holding us back from moving toward your Practical Vision?*

- Unfocused engagement impedes relationship building in community
- Unclear roles & limited training create barriers to a healthy, engaged organization
- Traditional models limit consistent, diverse funding sources
- Inconsistent communication, processes, and strategies limit collaboration and inclusion
- Narrow board definition and roles lead to underutilization and undiversified representation

**STRATEGIC DIRECTIONS** (So close, to be finalized and confirmed on Monday, August 30th @9:00AM) | *What innovative, substantial actions, programs or efforts can our board or staff do, create, or take on that will address our blocks and move us toward our Practical Vision?*

1. Implementing clear goals & expectations to strengthen & develop the organization
2. Actively building relationships to directly connect with individual donors
3. Developing a focus for community-led change
4. Developing clear, consistent messaging to create community understanding & engagement

| Community-Driven Results  | Community-Driven Results Continued  | Community-Driven Results Continued   | Community-Driven Results Continued   |
|---|---|--|--|
| <ul style="list-style-type: none"> <li>• Re-establish an allocation process</li> <li>• Supporting agencies that help domestic abuse survivors</li> <li>• Build capacity for and support organizations implementing Asset Based Community Development, with individuals and communities at the center and leading</li> <li>• Communities’ complete understanding of our work.</li> <li>• Meeting strategic needs of community</li> <li>• More board interaction with agencies</li> <li>• Engaging the community more in the role of the United Way</li> <li>• Partnership with Agencies that Address Community Needs</li> <li>• Inclusion of Environmental issues in our priorities</li> </ul> | <ul style="list-style-type: none"> <li>• Establish a regular connection program with agencies and volunteers</li> <li>• Adopt and support use of evidence-based health equity practices, in all organizations and programs that HLUW funds</li> <li>• Building capacity to plan for climate change crises</li> <li>• Long Term Plan to address Community Needs</li> <li>• more community engagement</li> <li>• Helping youth by supporting agencies that focus on their development</li> <li>• DEI-centered fund allocation methodology</li> <li>• More child based support organizations funded</li> </ul> | <ul style="list-style-type: none"> <li>• More engagement with the communities who benefit from our programs</li> <li>• Value of contributing to an organization that is vetted to make sure donations are local and support non duplicated and necessary organizations</li> <li>• Leveraging Community Impact with who United Way supports</li> <li>• Needs identified throughout community engagement process</li> <li>• focus on the needs of the homeless community</li> <li>• Further narrow and define the programs funded.</li> <li>• Raise awareness of HLUW’s role in uniting funders and organizations serving our most vulnerable populations</li> </ul> | <ul style="list-style-type: none"> <li>• Supporting agencies that help the homeless</li> <li>• Engaged with community partners</li> <li>• a more streamlined way of distributing funds that doesn’t have a lot of hoops to jump through</li> <li>• Community based results</li> <li>• Helping feed the hungry</li> </ul> |

| Healthy, Engaged Organization   | Healthy, Engaged Organization Continued  | Community-Powered Contribution Drive   | Community-Powered Contribution Drive Continued   |
|---|--|--|--|
| <ul style="list-style-type: none"> <li>• Well tuned, professional organization</li> <li>• Update Policies and Procedures</li> <li>• Staff development</li> <li>• Hold the President responsible and accountable to give annual goals and feedback</li> <li>• a clear mission</li> <li>• Better Board and Leadership Engagement</li> <li>• Make HLUW an exceptional place to work, where each team member’s talents are fully utilized to best serve our mission</li> <li>• Social portion of board meetings</li> <li>• Broad-based measures of success</li> <li>• A safe, comfortable, cooperative, efficient workplace environment.</li> <li>• Solid Union presence</li> </ul> | <ul style="list-style-type: none"> <li>• Inclusion of elected officials on the board</li> <li>• Reduce overhead.</li> <li>• A seasoned staff comfortable in their roles.</li> <li>• Build a board and organization that represents the communities that we serve</li> <li>• Review the number of people on the Board of Directors and work towards more of a “working board” vs having a large number of people on the board.</li> <li>• Grant Writer and Major Gifts Officer staff positions</li> <li>• Develop Staff Training and Development</li> </ul> | <ul style="list-style-type: none"> <li>• Expand by 50% our donor base.</li> <li>• Revitalize Campaign</li> <li>• More emphasis on events and individual donors.</li> <li>• Strengthening the sustainability of the organization</li> <li>• A diverse board focused on fundraising</li> <li>• Financial stability to support the programs</li> <li>• Growing donations</li> <li>• Engaged donors furthering the mission</li> <li>• Single issue (homelessness, trafficking) annual campaigns</li> </ul> | <ul style="list-style-type: none"> <li>• think and engage outside the usual</li> <li>• A continually growing campaign with community buy-in.</li> <li>• Increase number of engaged donors</li> <li>• Campaign chaired annually by household names</li> </ul> |

### Effective, Clear Marketing

- Increased brand awareness, education and recognition with the communities in which we serve
- Increased awareness by donors, potential donors, and general community of significance of HLUW funding to critical service providers
- A greater degree of understanding of the services HLUW funds by funders and the general public
- Consistent message to the community
- The importance of having a strong and well supported HLUW in place as a strong community service
- Create Better communication Strategies
- Be the go to agency for the community when a new need/ problem arises.
- Strengthen marketing initiatives that both reflect and support the mission and vision of HLUW
- Better community communication and outreach
- Understanding how HLUW works and what happens when people donate
- the community should know what United Way does
- Communicate effectively to all communities

### Integrated, Intentional Diversity, Equity & Inclusion

- A diverse board
- Develop equity strategy to carry out within the work of HLUW
- continue to engage diversity
- Strengthen equity and diversity in all levels
- Youth representatives on the board
- Inclusion statement
- leadership at HLUW that reflects the identities of the community
- Equity and community engagement is at the core of all our practices and engagement
- Deliberately include Native folks and people of color



| <p><b>Unfocused engagement impedes relationship building in community</b></p>   | <p><b>Unclear roles &amp; limited training create barriers to a healthy, engaged organization</b></p>  | <p><b>Traditional models limit consistent, diverse funding sources</b></p>   | <p><b>Inconsistent communication, processes, and strategies limit collaboration and inclusion</b></p>  | <p><b>Narrow board definition and roles lead to underutilization and undiversified representation</b></p>   |
|---|--|--|--|---|
| <ul style="list-style-type: none"> <li>• Unbalanced list of Community Needs</li> <li>• Silos of influence</li> <li>• Allocation model</li> <li>• Underdeveloped rural and diverse community connections</li> <li>• Rising conservative values potentially conflict with UW</li> <li>• Outdated and ineffective models for community engagement</li> <li>• “further clarify” Upcoming generation(s) less engaged in ‘community’</li> <li>• Uncharted engagement and relationships with donors</li> <li>• Limited UW support in smaller communities</li> <li>• Fragmented efforts to reach out to community members.</li> </ul> | <ul style="list-style-type: none"> <li>• Disjointed and underdeveloped potential to meet organization goals due to constant churn of staff</li> <li>• Unrealistic expectations on staff (understaffed)</li> <li>• Disjointed recruitment of new staff</li> <li>• Conflicting experiences of the workplace culture</li> <li>• Unclear job responsibilities, inconsistent and limited training</li> <li>• Underdeveloped focus, unclear roles/ responsibilities of Impact department</li> <li>• Inconsistent leadership</li> <li>• High rate of turnover</li> <li>• Uncoordinated/ ununified teams for action</li> <li>• Uncoordinated supervisory training for leadership team</li> </ul> | <ul style="list-style-type: none"> <li>• Inability to access in-person workplace presentations (Q&amp;A)</li> <li>• Outdated fundraising strategies</li> <li>• Limited fundraising strategies</li> <li>• Outdated legacy funding</li> <li>• Over-dependence on workplace giving as funding source</li> <li>• Corporate Giving on the decline</li> <li>• Under-utilization of volunteers in fundraising</li> <li>• Fluid workforce, faster employee turnaround</li> </ul> | <ul style="list-style-type: none"> <li>• Underutilized use of technology for donations</li> <li>• Neglected digitized record keeping</li> <li>• Inconsistent and misaligned brand messaging</li> <li>• Uncoordinated goals</li> <li>• Inconsistent communication and inconsistent response time</li> <li>• Excessive information available, much inaccurate</li> <li>• Limited UW awareness smaller communities</li> </ul> | <ul style="list-style-type: none"> <li>• Unclear board roles</li> <li>• Underutilization of board members and their community contacts</li> <li>• Absence of diversity within board</li> <li>• Disjointed recruitment for board members</li> <li>• Underutilization of board and committees.</li> </ul> |

| <b>Implementing clear goals &amp; expectations to strengthen &amp; develop the organization</b>   | <b>Implementing clear goals &amp; expectations to strengthen &amp; develop the organization<br/>CONTINUED</b>   | <b>Actively building relationships to directly connect with individual donors</b>  | <b>Expanding capacity for community-led change</b>  | <b>Communications &amp; marketing</b>   |
|---|---|--|---|---|
| <ul style="list-style-type: none"> <li>• Determine and implement clear goals and tracked metrics for President</li> <li>• Develop and execute staff and board recruitment plans</li> <li>• Construct strong Code of Ethics</li> <li>• Develop consistent training with increased accessibility to supervisors</li> <li>• Implementation of office hours for easy access to supervisors</li> <li>• Team-based action times over the year</li> <li>• Deepen Board/ Staff capacity to implement equity initiatives</li> <li>• Define expectations as a board member's responsibilities</li> <li>• strive to include inclusion practices throughout daily work structure</li> </ul> | <ul style="list-style-type: none"> <li>• Cross train and appreciate each other</li> <li>• Ensure alignment of staff on Mission</li> <li>• Hire great staff and train them well</li> <li>• Introduce board participation standards and fundraising expectations</li> <li>• Frequent realistic appraisals of individual workplace experiences</li> <li>• Offer regular ongoing supervisory trainings to leadership team</li> <li>• Clearly defined roles, duties and expectations of all positions (not job descriptions)</li> <li>• Effectively engaging diverse publics in HLUW leadership roles</li> </ul> | <ul style="list-style-type: none"> <li>• Creating direct relationships with donors (B2B2C model)</li> <li>• Create and execute an individual donor outreach plan</li> <li>• Communicate 'investment' qualities of UW support</li> <li>• Celebrate high-participation businesses &amp; Learn their practices and propose mentorship</li> <li>• Communicate how UW funded agencies benefit whole community</li> <li>• Focus giving campaign to how individuals give</li> <li>• Augmented fundraising strategies- get a book</li> </ul> | <ul style="list-style-type: none"> <li>• Explore /adopt innovations in community-led initiatives</li> <li>• Determine pressing community needs, fund them aggressively</li> <li>• Develop and execute an HLUW Ambassadors program</li> <li>• Enrich rapport and relationship with community influencers</li> <li>• Community Needs focus groups</li> <li>• Explore/ Adopt innovations in successful United Way organizations</li> <li>• Acts of service to the community</li> </ul> | <ul style="list-style-type: none"> <li>• Create clear and concise brand messaging within all communication avenues</li> </ul> |

## Current Realities, Success Indicators & Accomplishments

**Current Reality:** Description of the current situation as it relates to the Strategic Direction.

**Success Indicators:** Explains what will be different in 5 years if the organization mobilizes around and gets behind the Strategic Direction.

**Accomplishments:** Considers and answers “What do we need to accomplish at a level of program, project, or event to begin moving from Current Reality to Success as described?”

### SD1. Implementing clear goals & expectations to strengthen & develop the organization

#### **Current Realities**

Unclear expectations for staff and board

- New staff
- Some training and HR related onboarding
- Planned and upcoming trainings
- Board job description
- Differing levels of board engagement
- Audacity HR
- New focus on future and present versus past
- Need clarification for leadership expectations, e.g, UWW review forms don't fit us well as is
- Need clear policies/procedures training for staff and leadership

#### **Success Indicators**

- Increased donor giving
- Consistent & utilized training model for all positions
- Consistent onboarding and a deeper understanding of employee's positions
- Increased team satisfaction
- Increased tenure, less turnover
- All staff would have a greater understanding of all roles in the organization, creating stronger understanding and empathy
- Higher volume of board volunteer participation

#### **Accomplishments**

1. Reformulate purpose and agenda for consistent weekly staff check-ins that feeds board reporting
2. Create & clarify what a consistent working board culture means with the board, examples: calendar sign-up for volunteering, donating, etc.
3. Develop annual performance goals and set year-end review and professional development planning for staff & leadership
4. Facilitate the board in creating committee charges for each committee: Executive, Governance, Finance, Campaign
5. Create a policies and procedures manual to clarify staff & board expectations, including training on the manual
6. Create a regular board report process
7. Work plans for all teams across the organization

## APPENDIX 5

HEAD OF THE LAKES UNITED WAY  
AUGUST 30, 2021



### **SD2. Actively building relationships to directly connect with individual donors**

#### ***Current Realities***

- Very limited engagement with individual donors
- Focused on organizations
- Sending out flyers and ads on radio and TV
- Workplace agreements in place
- Connect with & reply on Employee Campaign Coordinator (ECC)
- No current moneymaker events

#### ***Success Indicators***

- Increased number of individual donors
- Increased giving as a whole
- Increased number of workplace campaigns
- Better knowledge & higher utilization of the donor database, including workplaces and individuals
- Higher donor retention in workplaces and individuals
- Consistent money-making events: every event should be monetized, at minimum breakeven
- Increased engagement with targeted cohorts / affinity groups, e.g., youth & elders, BIPOC communities, veterans, realtors, attorneys

#### ***Accomplishments***

1. Keep finger on the pulse for giving during extra money time periods, e.g., when people get their tax returns or stimulus money
2. Create consistent money-making events
3. Create non-traditional giving avenues
4. Develop affinity groups with clear leave-behinds for workplaces, e.g., retirees
5. Give donors purpose, making the “why,” and connect staff and board with opportunities to learn (e.g., bus tours to agencies that explain what they do and how UW benefits them)
6. Increase number of consistent retail roundups with incentive to participate (e.g., Cashwise Liquor, Super One, Whole Foods Coop)

### **SD3. Developing a focus for community-led change**

#### ***Current Realities***

- Lack of connection with community orgs and critical community issues
- Community funding panels review grant apps, listen to presentations by nonprofits seeking funding, and make decisions
- No engagement about where to put funding (guidelines developed internally)
- Lack of overall community engagement
- Volunteer coordination is in the works but has been neglected
- Planning tends to be very short-term, no longer-term effort
- Have lots of data but need to dig into (student survey, Bridge to Health)

#### ***Success Indicators***

- Meet funding goals
- Programs invested in generate measurable, meaningful results
- Expanding, actively engaged relationships with volunteers, donors, and community partners
- Clear funding strategy and process in place

## APPENDIX 5

HEAD OF THE LAKES UNITED WAY  
AUGUST 30, 2021



- Clear process is communicated to donors to show impact
- Work will build on community assets and strengths to leverage those strengths

### ***Accomplishments***

1. Develop processes with community input for fundraising and allocation
2. Research and implement evidence-based models for thriving communities and best practices based on other United Ways and similar organizations
3. Re-implementing community panels for outside ideas on processes
4. Meet regularly with organizations and their stakeholders, including clients, by conducting intentional outreach (don't expect them to come to us)
5. Develop metrics for engagement and outcomes and consistently assess progress

### **SD4. Developing clear, consistent messaging to create community understanding & engagement**

#### ***Current Realities***

- People don't know what HLUW does - lack of brand knowledge and awareness
- People are vaguely aware of philanthropic work - but where does it all go?
- Communication materials exist, but are outdated
- OK base of materials but has not been used in past
- Lack of communication and marketing policies in local organizations; resources available from United Way Worldwide
- Neglected record-keeping/online storage - lots created, but not kept and lost access, so often starting over
- Historically, materials have not recognized diversity of community
- Lack of relationship with the media
- Huge engagement in medical community, but little direct outreach
- Individuals who are corporate donors give for years but fall off when they retire

#### ***Success Indicators***

- Strong community engagement with target audiences
- Engagement leads to an increase in revenue
- Brand is better recognized and understood
- Increase in community partnerships for HLUW
- Organizational transparency to strengthen community relationships; easy access to information on how things work
- Internal and external understandings of HLUW work are more aligned
- Successful online platforms with engagement (e.g., website, social media, augmented reality)

### ***Accomplishments***

1. Revamp online presence (website, social media)
2. Develop and measure baseline for communications and marketing data and track it quarterly
3. Building effective yearly marketing plans
4. Develop stability and define communication processes for continuity
5. Create a stable, consistent program for community engagement
6. Generate concepts for awareness to accept and generate online revenue
7. Incorporate strategies to reach untapped donors in marketing plans
8. Adopt different communication strategies tailored to different audiences



## APPENDIX 7

HEAD OF THE LAKES UNITED WAY  
VISION, MISSION & CORE VALUES MINI-SURVEY SUMMARY  
SEPTEMBER 10, 2021



### BACKGROUND

This survey gathered strategy committee input on the Head of the Lakes United Way's Vision, Mission and Core Values, further building upon work completed.

During the previous three workshops, the strategy committee identified the practical vision, underlying contradictions, and strategic directions, which are detailed below.

#### **PRACTICAL VISION** | *What we want to see in place in five years as a result of our actions?*

- *Community-Driven Results*
- *Healthy, Engaged Organization*
- *Community-Powered Contribution Drive*
- *Effective, Clear Marketing*
- *Integrated, Intentional Diversity, Equity & Inclusion*

#### **UNDERLYING CONTRADICTIONS** | *What may be blocking us or holding us back from moving toward your*

*Practical Vision?*

- *Unfocused engagement impedes relationship building in community*
- *Unclear roles & limited training create barriers to a healthy, engaged organization*
- *Traditional models limit consistent, diverse funding sources*
- *Inconsistent communication, processes, and strategies limit collaboration and inclusion*
- *Narrow board definition and roles lead to underutilization and undiversified representation*

#### **STRATEGIC DIRECTIONS** | *What innovative, substantial actions, programs or efforts can our board or staff do, create, or take on that will address our blocks and move us toward our Practical Vision?*

1. *Implementing clear goals & expectations to strengthen & develop the organization*
2. *Actively building relationships to directly connect with individual donors*
3. *Developing a focus for community-led change*
4. *Developing clear, consistent messaging to create community understanding & engagement*

**This mini-survey asked three questions to identify core values and gather input on how committee members visualize the Head of the Lakes United Way's future.**

The first question asked participants ***"What are your aspirations or dreams for this organization?"***

Responses revolved around a few key themes including increased donations and funding and cohesion between staff and board members rising to the top. Other responses emphasized a desire to be recognized by the community as a leading charitable organization to both donate and/or receive support from in the region.


## APPENDIX 7

HEAD OF THE LAKES UNITED WAY  
VISION, MISSION & CORE VALUES MINI-SURVEY SUMMARY  
SEPTEMBER 10, 2021



Next, committee members were asked *“How would things be different if your aspirations & dreams came true?”*

Many responses indicate that if their aspiration from question one was to come true, there would be broad positive impacts for communities in the region. By increasing revenue and donations, the organization would have more consistent allocations for communities.



*“The community would be better served if we could pull together. We could fund organizations that do the work that is needed. We could be a positive impact to the people in need.”*

Finally, respondents were asked to identify **three words** that they felt, or hoped, embody the Head of the Lakes United Way. Those surveyed suggested 36 words, four words were mentioned multiple times.

| Core Value | # of Responses |
|------------|----------------|
| Community  | 4              |
| Focused    | 3              |
| Inclusive  | 3              |
| Innovative | 2              |