



The Network-Wide Strategy articulates the **UNIQUE POSITIONING** and **KEY ACTIONS** (Bold Plays) that will power our efforts to create a world where everyone has the opportunity to live a better life.

Unique Positioning

- ▶ We develop **integrated solutions** that improve lives AND communities
- ▶ We focus on what's most needed and **what works locally**
- ▶ We get leaders and organizations from **all sectors to work together**
- ▶ We **invite millions of people** to be part of the change and amplify the impact

Key Actions

BOLD MOVE WE MUST MAKE

TO ADDRESS THE CHALLENGE WE FACE

BOLD PLAY 1

EXECUTE ON A CLEAR BUSINESS MODEL

Shift from *“One great product marketed the same way to everyone”* to *“The right product to the right donor at the right time in the right way”*

Successful impact work not always driving revenue growth

BOLD PLAY 2

CREATE GREAT INDIVIDUAL EXPERIENCES

Engage people in ways they love in our new digital world: **personal, online and in-person, year-round, and over a lifetime**

Donor loss (slow growth outside U.S.); Rise of digital engagement platforms

BOLD PLAY 3

REIGNITE STRATEGIC CORPORATE RELATIONSHIPS

Re-establish United Way as the **Partner-of-Choice** for companies by delivering unparalleled employee engagement, community impact, and business value via strategic agreements and network-wide account management

Changing expectations for business affecting United Way value proposition

BOLD PLAY 4

DRIVE TRANSFORMATIONAL GIVING

Build a network of high-net-worth ambassadors, including a **\$10 Million Giving Society**, who accelerate our impact and innovation worldwide

Slower growth of High Net Worth Individual giving to United Way in recent years

BOLD PLAY 5

WORK TOGETHER AS ONE NETWORK

Harness the power of scale to raise our operational performance and speak as **one brand with one voice**

Competitive pressures require us to work “as one” more often

Key UWW/Collective Actions

- A. Develop a refreshed Business Model with clear content (proven impact products, RD insights, etc.) and support LUW execution via consulting/toolkits and LUW performance scorecards
- B. Improve LUW/UWW performance by advancing culture, organizational design, talent, and diversity practices and initiatives

- A. Engage workplace employees at scale through Shared Digital Services and by accelerating promising Individual Experience (IE) practices
- B. Create more air-cover and expand reach via innovative initiatives/alliances (Hero Effect, NFL, Do Something, Salesforce, etc.)

- A. Pursue Network-Wide Corporate Relations capability to manage strategic relationships; Incorporate 3rd party processor strategy to get closer to our companies and their people
- B. Execute a marketing initiative that recognizes top corporate partners, connects to their marketing, drives C-Suite engagement, and communicates UW's relevance

- A. Attract transformational gifts through the creation of a \$10M giving society
- B. Grow Tocqueville giving by building LUW capacity and competencies

- A. Shift to working “as one” across markets including facilitating the Strategy Leadership Council and Network Operating Groups
- B. Develop and help deliver consistent, compelling Brand messages across markets

Key LUW Actions to Consider

- A. Clarify your LUW business model including integrating Impact, RD, and Marketing to deliver “The right impact product to the right person in the right way”
- B. Focus on high-performance in your LUW by drawing on UWW resources to improve Talent/Diversity/Board and setting multi-year performance goals on impact, operations and revenue

- A. Implement LUW best practices from the 2016 Individual Experience Report (text “innovation” to 51555 or visit <http://bit.ly/iereport2016>) and engage in network IE efforts such as Shared Digital Services, LINC, etc.
- B. Focus on access to individual donors (data) in highest growth potential workplace campaigns

- A. Develop and execute strategic agreements with your top local companies that articulate clear social impact and business value goals (with a focus on employee engagement) as well as set regular meeting/reporting standards
- B. Inform/Execute network-wide corporate agreements including supporting cross-market corporate recognition efforts

- A. Seek transformational gifts at \$10M level or “add a zero” to your current top level
- B. Build local capacity and competencies to secure large gifts including recruiting/managing a Tocqueville Cabinet and developing written plans to retain and grow multi-year giving

- A. Contribute your expertise and insights to the network and align your LUW strategy/efforts; Participate in network operating groups as appropriate
- B. Communicate your LUW's unique position in the market in alignment with overall Brand messages including reporting on impact goals

“Quick Start” 2016 LUW Actions

Talk to your donors in the workplace to determine their interests (by segment) and map back to your impact products/causes

Improve your 2016 campaign by setting a specific donor # goal, capturing personal donor data, and implementing 2016 Individual Experience best practices (bit.ly/iereport2016)

Create 2–3 local corporate agreements in 2016

Identify 10 potential \$1M–\$10M donors in your market

Complete the United Way Business Model Guided Toolbox and identify specific needs that will drive your interactions with UWW and the broader UW network

ADDITIONAL RESOURCES:

Access UWW's tools and resources for LUWs of all sizes as needed

- ▶ Visit online.unitedway.org/strategy
- ▶ Small LUWs: Connect with peers and access resources: bit.ly/smallUW