



February 14, 2017

To: Community Members

From: Alison Munson, CEO of United Way of the Lewis and Clark Area (UWLCA)

Thank you all for allowing us the opportunity to present to you this morning on the vision and future of UWLCA. We would like to share the following document with you on how the process was lead and the results. This vision, created by our community members, will guide us as we respond to the changing needs in the tri-county area and our transition to a **collective-impact approach**.

We are committed to moving towards a collective impact model. Collective impact is a proven structured approach to fostering deep collaborations across all sectors: nonprofits, government, businesses, funders, educators and faith communities. We are confident that this approach will allow us to address complex issues within our priority areas of health, education, prosperity and basic needs.

Please join us! Our ask of you as a respected community member is to join a community conversation. Sign up sheets are on your table or you can Contact Trina Filan, trina@unitedwaylca.org, so that we can target work to solving deeply rooted local concerns. These conversations will provide us with the perspective of the community..

**United Way of the Lewis and Clark Area's Mission:
Build the capacity for people to care for one another in the Broadwater,
Jefferson, and Lewis and Clark counties.**

United Way of the Lewis and Clark Area builds a better community for all in the areas of education, health, prosperity and basic need.

We collaborate with a diverse community partners to identify important social issues and bring together resources to address them.

We give donors a trusted, one-stop way to support critical services for members of our community, and make sure that donated dollars are invested wisely and well.

Like our Facebook page today to follow our progress or sign up for email updates by visiting www.unitedwaylca.org today!

United Way of the Lewis & Clark Area

P.O. Box 862 Helena, MT 59624

406-442-4360

www.unitedwaylca.org

LIVE UNITED



LIVE UNITED



Of The Lewis & Clark Area

Community Visioning Session Results



2017

Mission & Vision

During the vision sessions, United Way stakeholders reviewed the organization's mission and "We Believe" statement and developed a new vision to guide the organization in the future. UWLCA's mission is a statement of "Who", "What" and "How" the organization works. The vision statements encapsulates the ideal future for the Lewis and Clark area (Broadwater, Jefferson and Lewis and Clark counties) if the United Way fully achieves its mission. The "We Believe" statement is the underlying value and belief of the organization that guides its work.

Mission

Our mission is to increase the organizational capacity for people to care for one another in Lewis and Clark, Broadwater and Jefferson counties.



"We Believe" Statement



We believe all people should have the opportunity to be educated, engaged, prosperous, and healthy.

Vision

We envision a united community of thriving neighbors.



Background

In October through December 2016, stakeholders from across our community convened to give their input on the future vision and direction of the United Way of the Lewis and Clark Area (Broadwater, Jefferson and Lewis and Clark Counties). The groups met for four, one-hour sessions, which were facilitated by an independent contractor and designed to answer the following questions.

Where are we now?

Through a series of participatory exercises, stakeholders were asked to describe the United Way of the Lewis and Clark Area's internal strengths and weaknesses as well as external opportunities and threats.

Where do we want to be?

The group reviewed the United Way of the Lewis and Clark Area's Mission and "We Believe" statement and developed a new, overarching vision to guide the organization moving forward. The group also identified key priority areas for collective action for the United Way of the Lewis and Clark Area to focus on in the future.

How will we get there?

Finally, the gathered stakeholders developed guiding principles, a clear set of core beliefs and values, that can be used by the United Way of the Lewis and Clark Area to guide future decision making for funding, especially as UWLCA transitions to a collective impact business model. This transition involves a purposeful shift from a "me" perspective to a "we", or community-wide, perspective. Collective Impact will allow United Way to bring groups together with common goals to create true social change.

The results of the visioning session input are presented on the following pages.

SWOT Analysis

- Energy - Dedication - Trusted - Solid - Efficient - Invested - Knowledge - Visible - Welcoming - Collaborative - Supportive of agency partners - Accessible - Experienced - Wide reaching - Eager to help - Popular - Open minded - Communication - Accessible - Caring - Clear and measurable goals
- Long, rich history
- Provides consistent funding to partners and non-profits
- Provides help to children in need
- Open to everyone
- Serves basic needs of the community
- Established processes
- Connection to community as a whole
- Coordinate coalitions
- Connects businesses and non-profits
- Helena's generous spirit & stable economy
- Work place giving system
- Money raised
- Provision for contributions to non-United Way partners
- Grant process engages community members
- Clean audits

Strengths

- Money, not outcome based - need more metrics
- Ability to reach broader citizen community with "impact" message
- Support but not big picture change
- Reinforces the status quo
- Money can seem like an entitlement
- Pulled in too many services "band aid" fixes
- Board driven allocations
- Limited money and competition for dollars
- Lack of diversity
- 450 non-profits in our area, over-extended potentially - can't do "it" all
- Not seen as a leader
- Communication with partner agencies
- Tight operating budget, small staff
- Governance-Ambiguity in citizen review evaluation
- Confusing organization to new partners and donors
- Difficult grant process
- Achieving public/private coordination
- Enough interaction with partners to know their needs
- Attracting young volunteers
- So much information-Services not known

Weaknesses

Opportunities

- Show impact of services and funding-accountability
- Leverage resources to meet community needs
- Collective impact can showcase how each non-profit contributes
- Braided funding of many non-profits makes the money go further
- Bigger impact=bigger grants
- Potential for more outreach
- Bring together resources to fill gaps
- Coordinate services without duplication
- Encourage risk taking
- Proactive versus reactive approach
- Learn from similar top organizations
- Increase community compassion
- Bringing to awareness to issues, greater visibility
- Creates hope and produces synergy
- Better meet needs and understand issues
- Expanded, engaged community and volunteers
- Opportunity potential for more outreach

Threats

- Lose ability to help all partners
- Loss of funding
- Competition and not agreeing with agencies that get funding
- Pushback from partners, fear of change
- Resistance to assistance model
- Agencies used to entitlement funding
- More and more needs
- Staff changes, losing momentum with the shift
- Losing NPOs
- Politics
- Lack of community support
- Losing donors if we don't change
- Money not available to those who do the work
- Loss of donors (aging/retirement)
- Fundraising exhaustion
- Corporate matching being cut
- Lack of business involvement
- Less government funding
- Manage growth
- Not ahead of the game in terms of how people want to give (online, through apps, etc.)

* Direct input from participants.

Priority Areas

FOR COLLECTIVE IMPACT

The following areas were prioritized by the participating stakeholders for funding areas of focus for the United Way of the Lewis and Clark Area in the future. The items are listed in order of the number of votes each received by the group during the prioritization exercise, bolded items received the most votes.

Basic Needs

- **Housing: homelessness, shelter, affordability**
- **Food insecurity and hunger**
- Transportation
- Ease of access to systems
- Crisis: child abuse, ACEs, families in crisis
- Economic issues: increase minimum wage, family connectivity and security

Prosperity

- **Life skills and education: education, budgeting, free tax help**
- **Affordable, safe childcare**
- Job training
- Youth activities

Education

- **Life and job skills: financial education, technical/vocational skills, debt education**
- Early education
- Graduation/Hi-Set/Vocational Training
- Gaps in availability of education

Health

- **Mental health**
- **Suicide**
- Adverse Childhood Experiences
- Substance abuse
- Chronic disease
- Health literacy

Guiding Principles

FOR COLLECTIVE IMPACT

The following principles were developed by the visioning group to guide the United Way of the Lewis and Clark Area toward a greater focus on collective impact in the future.

- **Collaboration and inclusivity:** We foster innovative, collaborative solutions that leverage resources across sectors and are supported by the input of diverse voices.
- **Transparency and accountability:** We require measurable and achievable metrics.
- **Sustainability:** We focus on implementation of solutions that last.
- **Evidence based practice:** We support effective solutions supported by research and evaluation.
- **Convening and facilitation:** We coordinate processes that build our community's capacity.

Acknowledgements

The United Way of the Lewis and Clark Area (Broadwater, Jefferson, and Lewis and Clark counties) would like to thank the following individuals and organizations for participating in our 2016 visioning session:

Ann Waickman	Marcia K. Wall
Annie Mclaughlin	Melissa Baker
Bev Blokzyl	Michael McLane
Bonnie Anderson	Michael O'Neil
Bruce Day	Michele Curlee
Carrie Krepps	Nancy Cormier
Christopher Facundo	Newell Anderson
Colleen Brady	Nick Zullo
Colleen Roylance	Paula Hunthausen
Daneal Lightner	Peggy Benkelman
Darla Fitzpatrick	Riley Kuntz
Deb Halliday	Rob Shipley
Drenda Nieman	Robert Rasmussen
Erik Amundson	Roger Stone
Jasyn Harrington	Sarah Shapiro
Jaymie Sheldahl	Shani Rich
Jenny Wallace	Shannon Hall
Karen Lane	Sioux Roth
Kathie Wagner	Steve Garrison
Kathy Marks	Steve Rock
Kim Howard	Suzanne Severin
Kim Lloyd	Suzi Stanger
Kris Brandt	Theresa Ortega
Laurie Ekanger	Tim Fitzpatrick
Liz Campbell	Wilmot Collins
Lori Ladas	

We also extend our heartfelt thanks to all community members who attended community conversations over the last year!