

United Way of Rock River Valley

MISSION STATEMENT

To improve life in the Rock River Valley by mobilizing the caring power of our community.

VISION

We will create a community of healthy, well educated and financially stable individuals and families.

CORE VALUES

- Integrity
- Accountability and Transparency
- Respect for Human Dignity
- Dedication to Community Success
- Innovative Leadership
- Operational Excellence

AREAS OF FOCUS

- Education
- Income
- Health

SERVICE AREA

Winnebago and Ogle Counties

Board of Directors

Steve Balogh

Attorney
WilliamsMcCarthy LLP

Brent Bernardi

President
Alpha Controls & Services

Patti Bigger

Corporate Relations Manager
Specialty Screw Corporation

Rick Brattland

Integration Manager.
Jones Lang LaSalle

Craig L. Carlson

V.P./Relationship Manager
JPMorgan Chase Bank, N.A.

Nancy Conry

Business Development Coordinator
Hamilton Sundstrand

Bill Derry

President
Field Fastener Supply

Earl Dotson, Jr.

Deputy County Administrator
Winnebago County Administrator's Office

Ms. Idalis Edgren

Attorney

Linda Gerber

CEO
Rock River Valley Blood Center

Darrin Golden

Business Manager
IBEW Local 364

Gary Halbach

Executive Director
Remedies Renewing Lives

Roberta Holzwarth

Attorney
Holmstrom & Kennedy

Wray Howard

President and CEO
YMCA of Rock River Valley

Phillip Johnson

Retired
AFT/IFT 540

John Kane

Director of Human Resources
Stillman BancCorp, N.A.

Harlan Knuth

Sr. V.P./Human Resource Director
Associated Banc-Corp

Nick Lauer

Cedric Lewis
Chief Financial Officer
Rockford Public Schools

Pam Maher

CEO
KMK Media Group

Pat Morrow

Sr. V.P.
Alpine Bank

Tom Myers

V.P., Marketing & Strategic Planning
SwedishAmerican Health System

Dan Parod

Sr. V.P., Hospital & Administration Affairs
Rockford Health System

Lucy Rivas

Director, Human Resources
OSF Saint Anthony Medical Center

Jim Ryan

City Administrator
City of Rockford

Marilyn Spradling

UAW Local 1268, Chrysler

Andrea Ward

Community Banking Regional President
Harris N.A.

Linda Zuba

Attorney
Zuba & Associates

Edward Zurowski, Jr.

APWU Local 79

Ad-Hoc Strategic Planning Committee

Steve Balogh
Patti Bigger
Rick Brattland
Bill Derry
Linda Gerber
Gary Halbach
Roberta Holzwarth
Phil Johnson
Lucy Rivas
Linda Zuba

Staff

Paul Logli, President/CEO
Rodney Prunty, Vice President
Andy Burningham, Campaign Director

United Way of Rock River Valley

Strategic Planning Summary

2013/2020



GIVE. ADVOCATE. VOLUNTEER.
LIVE UNITED

www.unitedwayrrv.org | www.wevolunteer.org



United Way
of Rock River Valley

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United Way of Rock River Valley

Strategic Focus

Goals for the Common Good

2011 and 2012 will be busy years as we work towards accomplishing our 2013 strategic goals. For over 90 years, United Way of Rock River Valley has mobilized the caring power of our community. Much of our work has focused on raising funds each year to support programs at local agencies that provide programs that serve children, youth, seniors, those with disabilities, and more. While we maintain our commitment to providing funds to our agency partners, we now face new challenges and this strategic plan represents our transition to the Campaign for the Common Good.

Our Strategic Challenges

EDUCATION

The graduation rate in School District #205 lags behind other school districts in the state. During the 2008-2009 school year, 70.9% of students graduated from Rockford high schools compared to 93% in Hononegah, 96.1% in Winnebago, and 100% in Pecatonica.

Source: 2010 Healthy Community Study

Only 13.6% of residents in Winnebago County and 11.9% of Ogle County residents hold a Bachelor's Degree, compared to the state average of 18.6% and the national average of 17.4%.

Source: 2005-2009 American Community Survey

INCOME

During 2005-2009, Winnebago County median household income stood at \$46,882, well below the Illinois average of \$55,222.

Source: U.S. Census Bureau; 2005-2009 American Community Survey

More than one in five (21.3%) Winnebago County children under the age of 18 live in poverty, higher than the Illinois average of 16.8%.

Source: 2010 Healthy Community Study

HEALTH

"Based on National Center for Health Statistics data published in Summary Health Statistics for U.S. Adults: National Health Interview Survey 2004, joint symptoms, arthritis, lower back pain, and high blood pressure top the list of chronic conditions experienced by the adult population. Applying these estimates to our community's 2009 population yields more than 60,000 area residents afflicted with one of these conditions."

Source: 2010 Healthy Community Study

We know the need to act is great. These challenges have created possibilities for United Way to think differently about traditional partnerships and to establish new and bold collaborations from across sectors—big businesses, small businesses, elected officials, nonprofits, academia, the faith community, the labor movement, the media, parents and neighbors. Working together, we can accomplish things that no organization, individual, or government can accomplish on its own.

Living United, we will successfully address these challenges and accomplish our strategic goals.

Stephen E. Balogh
Board Chair, UWRRV
Improving education, income and health in the Rock River Valley is essential to the survival, growth and revitalization of this community, and the United Way strategic plan outlines a clear path to a better future.

Goal #1: Community Engagement & Vision

2013 – Using local data and community input create a shared vision and set of goals for collective action in the community in the areas of education, income and health.

2020 – The UWRRV will be recognized as having mobilized and engaged the community in a shared vision of improving life in the areas of education, income and health.

STRATEGY STATEMENTS FOR #1

Knowledge of the Community. UWRRV will identify, understand and engage existing and emerging communities and will build relationships with community leaders and people of influence in all sectors;

Community Engagement and Mobilization. UWRRV will listen to, learn from and motivate diverse individuals, groups and sectors to better understand, become involved in and take action on the priority issues of education, income and health;

Shared Community Vision. UWRRV will work with the community to establish a shared vision for the future by creating a collective understanding of key community interests, aspirations, assets and concerns which represent the perspectives of diverse groups, individuals and sectors; and

Public Policy Engagement. UWRRV will actively engage in mission related public policy and develop partnerships that include local, state and federal governments along with the private sector and nonprofit sector.

Goal #2: Impact Strategies, Resources and Results

2013 – The UWRRV will develop and prioritize measureable goals for improvement of education, income and health.

2020 – UWRRV will be recognized as the local leader in mobilizing the community to successfully address critical issues as measured by the achievement of goals in the areas of education, income and health.

STRATEGY STATEMENTS FOR #2

Impact Strategies. UWRRV and its partners will engage the community in developing a comprehensive plan, and the strategies for implementation, to positively impact the education, income and health of individuals in the community;

Partner Engagement. UWRRV will build quality relationships with diverse partners in order to engage them in developing sustainable strategies to improve the education, income and health of individuals in the community;

Resource Development and Mobilization. UWRRV, recognizing the changing nature of workplace campaigns, will build personal relationships with donors and investors, segment markets based on donor interests, and recognize all contributions, in order to mobilize the many community assets needed to

Paul Logli
President/CEO, UWRRV
This is not a strategic plan to be placed on a shelf. This is a call for action to hit the ground running and change the direction of our community.

Strategic Goals

implement strategies and to achieve meaningful results;

Implementation and Action. UWRRV, recognizing that community impact cannot be achieved through any single strategy, will implement an array of impact strategies and actions, beyond merely funding agencies, programs or services, in order to achieve desired results and improve life; and

Measure, Evaluate and Communicate Results. UWRRV will regularly and transparently communicate impact strategies, activities and results to stakeholders, and listen to their feedback, in order to continuously evaluate and improve those strategies.

Goal #3: Relationship Building and Brand Management

2013 – The UWRRV will identify and grow relationships to attract and retain resources for achieving goals in the areas of education, income and health.

2020 – UWRRV will be recognized as the premier philanthropic organization in the community by both contributors and recipients.

STRATEGY STATEMENTS FOR #3

Relationship – Oriented Culture. UWRRV will support a culture in its leaders, volunteers and staff that reflects commitment to its mission;

Market Intelligence. UWRRV will collect, analyze and use critical information about the market and target audiences, in order to better respond to market trends and customer requirements;

Segmentation and Prioritization. UWRRV will identify and prioritize key customer segments and partners to build relationships important to achieving community impact goals;

Active Cultivation. UWRRV will actively cultivate, maintain and grow key relationships to increase giving, advocating and volunteering;

Unique, Positive Brand Experience. UWRRV will deliver results, engage, communicate and create a consistent brand experience for our stakeholders; and

Prominent Stature and Reputation. UWRRV will be recognized as the leader on improving education, income and health as well as a strong partner on a range of other community issues.

Goal #4: Organizational Leadership & Governance

2013 – The UWRRV will provide governance and leadership which appropriately aligns resources to execute the strategic plan in keeping with its mission.

2020 – UWRRV is recognized as a mission-centered and vision-driven organization that models its core values and provides visible, active and effective leadership.

STRATEGY STATEMENTS FOR #4

Mission. All organization activities of the UWRRV will be consistent with the mission of the agency and all UWRRV volunteers and employees will understand, articulate and support its stated purpose;

Staff and Volunteer Leadership. UWRRV's CEO and volunteer leaders will provide visible, active and effective leadership for the UWRRV and the community it serves, holding themselves accountable for achieving community impact and organizational goals;

Governance. The UWRRV's all volunteer board of directors will be effective in setting direction for the organization, ensuring necessary resources and providing oversight of programs, finances, legal compliance and values; and

Strategic and Business Planning. The UWRRV's board of directors will establish long- and short-term goals and identify strategies to accomplish those goals. These strategies will be based on data and analysis addressing the priorities of education, income, and health in the community and will drive resource development, marketing, financial and operational planning, as well as staff work plans and accountability.

Goal #5: Operations

2013 – UWRRV will utilize efficient, accountable and cost effective systems, policies and processes in support of its mission.

2020 – The UWRRV will be recognized as a model of operational excellence.

STRATEGY STATEMENTS FOR #5

Administration Efficiency. UWRRV will maintain high quality, cost effective operational and business functions;

Risk Management. UWRRV will provide adequate protection for the organization's assets including a comprehensive business continuity plan;

Facilities. UWRRV will provide a safe welcoming physical environment that is accessible, practical, recognizable and expressive of the organization's mission;

Financial Policies and Controls. UWRRV leaders, staff and volunteers will act prudently in order to ensure financial stability, safeguarding of assets and compliance with all fiduciary, legal and regulatory responsibilities and requirements; and

Public Reporting and Transparency. UWRRV will be appropriately accountable and transparent in the conduct of its business.

Janyce Fadden
President and CEO
Rockford Area Economic
Development Council
Employers can only grow and prosper in our community when we provide educated and healthy workers. This plan is critical to accomplish these goals.