### 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

<table>
<thead>
<tr>
<th>Name</th>
<th>Title/Position</th>
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<tbody>
<tr>
<td>Steve Balogh</td>
<td>Attorney, WilliamsMcCarthy LLP</td>
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<tr>
<td>Brent Bernardi</td>
<td>President, Alpha Controls &amp; Services</td>
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<tr>
<td>Patti Bigger</td>
<td>Corporate Relations Manager, Specialty Screw Corporation</td>
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<tr>
<td>Rick Brattland</td>
<td>Integration Manager, Jones Lang LaSalle</td>
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<tr>
<td>Craig L. Carlson</td>
<td>V.P./Relationship Manager, JPMorgan Chase Bank, N.A.</td>
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<tr>
<td>Nancy Cony</td>
<td>Business Development Coordinator, Hamilton Sundstrand</td>
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<tr>
<td>Bill Derry</td>
<td>President, Field/膻ater Supply</td>
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<tr>
<td>Earl Dotson, Jr.</td>
<td>Deputy County Administrator, Winnebago County Administrator’s Office</td>
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<tr>
<td>Ms. Idalis Edgren</td>
<td>Attorney</td>
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<tr>
<td>Linda Gerber</td>
<td>CEO, Rock River Valley Blood Center</td>
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<tr>
<td>Nick Lauer</td>
<td>Chief Financial Officer, Rockford Public Schools</td>
</tr>
<tr>
<td>Cedric Lewis</td>
<td>CEO, KMK Media Group</td>
</tr>
<tr>
<td>Pam Maher</td>
<td>Sr. VP, Alpine Bank</td>
</tr>
<tr>
<td>Pat Morrow</td>
<td>V.P., Marketing &amp; Strategic Planning, SwedishAmerican Health System</td>
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<tr>
<td>Dan Parod</td>
<td>Sr. VP, Hospital &amp; Administration Affairs, Rockford Health System</td>
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<tr>
<td>Lucy Rivas</td>
<td>Director, Human Resources, OSF Saint Anthony Medical Center</td>
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<tr>
<td>Jim Ryan</td>
<td>City Administrator, City of Rockford</td>
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<tr>
<td>Marilyn Spraddling</td>
<td>[Company Name]</td>
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<tr>
<td>Andrea Ward</td>
<td>Community Banking Regional President, Harris N.A.</td>
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<tr>
<td>Linda Zuba</td>
<td>Attorney, Zuba &amp; Associates</td>
</tr>
<tr>
<td>Edward Zuroski, Jr.</td>
<td>APWU Local 79</td>
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<tr>
<td>Nick Lauer</td>
<td>V.P., Human Resource Director, Associated Bank-Corp</td>
</tr>
<tr>
<td>Paul Logli</td>
<td>President/CEO, Stillman Bancorp</td>
</tr>
<tr>
<td>Rodney Prunty</td>
<td>Vice President, APWU Local 79</td>
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<tr>
<td>Andy Burningham</td>
<td>Campaign Director, APWU Local 79</td>
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### Strategic Planning Summary

**2013/2020**

**GIVE. ADVOCATE. VOLUNTEER.**
LIVE UNITED

www.unitedwayrrv.org | www.wevolunteer.org
Goals for the Common Good

2011 and 2012 will be busy years as we work toward 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 2050 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.

INCOME

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

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, low 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 affected with one of these conditions." Source: 2010 Healthy Community Study

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.

Goal #2: Impact Strategies, Resources and Results

2013 – The UWRRV will develop and prioritize measurable 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.

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.

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.

United Way of Rock River Valley

Paul Logli
President/CEO, UWRRV

Stephen E. Balogh
Board Chair, UWRRV

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 priorities 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.

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 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.

STRATEGY STATEMENTS FOR #3

Relationship – Oriented Culture.

UWRRV will support a culture in its leaders, volunteers and staff that reflects commitment to achieving community impact;

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; and Segmentation and Prioritization.

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

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 leader 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.

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 will be appropriately accountable and transparent in the conduct of its business.