

2020-2022 Strategic Plan

Mission:

We unify, strengthen, and elevate Utah's nonprofits

Vision:

We promote strong and vibrant communities for all of Utah

Process:

Our Executive Committee decided in April 2019 that our Mission and Vision statements were still relevant and activated a smaller group from our Board to serve on a Strategic Planning Committee. Our Strategic Planning process had a three pronged approach and involved smaller committee meetings, full board discussions, and at various junctures also included UNA staff (UNA CEO was involved in all meetings). Our Strategic Planning Committee meetings commenced in May 2019 and by the time we voted to approve the plan in March 2020, the committee had met a total of ten times.

We mapped out strategic priorities; we discussed how our members engage with us and how they utilize our services. We talked heavily about our gaps and also discussed what our future would look like if we fulfilled the gaps within our nonprofit community. We also reflected on staff capacity and what would need to change in order to accomplish this robust plan.

Special note about timing:

This Strategic Plan was approved by our Board in March 2020 amidst the COVID-19 pandemic. Recognizing that our economy has been shaken and the full scope and force of an economic downturn had a high probability to impact this plan, our Board felt strongly that approval of this plan was important and that it could serve as a guide. As with all Strategic Plans, ours will be monitored and adjusted as time passes by our Board and our CEO.

There are five Strategic Priorities that were identified for this Strategic Plan period of 2020-2022.

Marketing and Communications
Race Equity Diversity and Inclusion
Public Policy and Advocacy
Membership Benefits
Rural Engagement

Year 1 – 2020

We will create brand guidelines and implement them organization-wide.

- We will have updated brand guidelines.
- We will train staff on brand guidelines.

We will train our UNA Credential Subject Matter Experts (SME) on Race, Equity, Diversity, and Inclusion (REDI) principals and work with each of them to identify ways they can incorporate

those REDI principals into the Credential course they teach. We will share data, research, and other information with members regarding REDI, including what it is and how it can be applied at their organization.

As a team, we will continue to do the internal REDI work.

- We will contract with a trainer who will teach REDI to SMEs.
- We will identify the measurement for how REDI applies in all nine Credential areas.
- We will have a set of REDI values that we operate from.
- We will highlight REDI through our marketing and communications channels once per quarter.

We will implement the Public Policy and Advocacy Strategy established in the third quarter of 2019.

- We will host 11 events focused on Public Policy and Advocacy.
- We will survey participants following each event.

We will create a reciprocal strategy to attract and keep business memberships.

- We will understand the current value of business membership and identify any gaps in services.
- We will gather information through surveys, focus groups, and individual conversations.
- We will create a list of businesses prospects that fit nonprofit member needs.

We will maintain our existing relationships and work to create a strategy so that we can expand and prioritize various regions across Utah.

- We will create subcommittees that can help us identify rural organizations that can act as Host Organizations to assist in reaching more nonprofits in rural communities.
- We will use data mapping to identify nonprofit concentration and identify potential nonprofit organizations in rural communities that can benefit from the work of UNA and/or potentially be a Host Organization.

Year 2 – 2021

We will create then incorporate a Marketing and Communications Plan.

- We will evaluate this plan at least twice a year and adjust as needed.
- We will evaluate our feedback loop with nonprofits and adjust as needed.

All our UNA Credential courses will have Race, Equity, Diversity, and Inclusion (REDI) incorporated and our Standards of Ethics will be updated to include REDI.

- All nine of our Credential courses have measurable outcomes for how REDI can be measured in each course and the curriculum reflects this update.
- We continue to build out REDI resources and information for our members.
- We will infuse REDI into Standards of Ethics.

We will evaluate and make improvements to the Public Policy and Advocacy Strategy and increase engagement as necessary.

- We will review survey and participant data and implement needed adjustments.

- We will survey those who have not participated to identify their needs.

We will engage with business members through benefit based marketing.

- We will net 3-5 new business members.
- We will increase business revenue by \$2,000.

We will increase the number of UNA Host Organizations in rural communities

- We will develop a Host Organization process that identifies partnership opportunities.
- We will identify tech requirements for Host Organizations.
- If needed, we will work with Host Organizations to help them identify resources so that they can obtain the necessary tech to become a Host Organization.
- We will create standards for trainers and Host Organizations to follow so that remote, off-site UNA trainings are well received by all stakeholders.
- We will identify 4 Host Organizations.

Year 3 – 2022

We will expand our marketing, reach, and awareness to the general public.

- We will research and obtain a grant to measure brand awareness.
- We will leverage results from brand awareness to understand and court our target audience.

We will infuse our Race, Equity, Diversity, and Inclusion (REDI) knowledge and tools across our membership and to all Utah nonprofits.

- We will provide nonprofit organizations with a quarterly training on REDI.
- We will widely distribute and encourage self-assessment tools to nonprofit organizations and their stakeholders.

We will deepen relationships with city and county government officials.

- We will have a full time staff member allocated for this work.
- We will identify individuals and incorporate that data into our database; maintain and update as needed.

We will evaluate the business member recruitment strategy and make adjustments as needed.

- We will measure the revenue increase and business engagement and will make adjustments for growth.
- We will have business membership that reflects nonprofit member needs.

We will create and adopt a strategy to recruit more rural members.

- We will develop and distribute a survey to nonprofits in rural communities inquiring about what has worked, what has not worked, and any additional feedback that could be useful to steer future rural engagement efforts.



Strengthening Organizations That Strengthen Our Community

Committee:

David Schmidt, Committee Chair
Laura Hadley
Luis Garza
Ed Roberson
Shawn Newell,
Liz Dana
Lydia LaSalle
Kate Rubalcava, CEO

Staff and Board Involvement (if not mentioned above):

George Lindsey, UNA Chair in 2019
Rob Harter, UNA Chair in 2020
Cathy Barnhart

Princess Gutierrez
Steve Beyers
Brent Andrewsen
Shalaun Howell
Jordan Toone
Ruby Chou
Paul Burnett
Peggy Green
Luke Deppermann
Mara Haight
Natalie El-Deiry
Eric Marx
Jill Bennett, UNA Staff
Brandy Strand, UNA Staff