



STRATEGIC PLAN

2023-2026

OVERVIEW

Mission, Vision, and Values

UNA is about building happy, healthy, resilient communities—communities that provide shelter, solace, joy, inspiration, nourishment for bodies and souls, and healing for our air, water, and land. We accomplish this by unifying, elevating, and strengthening the organizations—Utah’s nonprofits—that have taken upon themselves the mission to improve our world. Nonprofits have seen the demand for their services increase without commensurate developments in capacity—leaving them to do more and more with less and less. UNA has a proven 32-year history of increasing nonprofit capacity by equipping organizations with the information, training, resources, and benefits that they need to advance their missions. This strategic plan is structured to strengthen UNA’s existing suite of programs and services while offering innovative ways for diverse stakeholders to come together in service of nonprofit sustainability and community building.

UNA, a 501c(3) nonprofit charity with a diverse revenue model, an engaged and active board of directors, and a deep commitment to building a community of extraordinary nonprofits is committed to creating purposeful and intentional spaces for nonprofits in Utah by leading with our shared values: Inclusivity, Learning, Community, Integrity, and Humility.

Strategic Vision for 2023-2026

The vision of the UNA of tomorrow is to continue the crucial work of nonprofit capacity-building but expands its scope to the fortifying of connections between organizations, funders, businesses, government entities, and individuals to create a true community working in concert to aid and nurture all of Utah.

Each of the strategic goals presented in this document exists to solve a problem or address a clear need in the nonprofit sector. Together, they provide a framework for broad, systemic change.

Strategic Goals at a Glance

1. Launch Cross Collaboration Project by Community Anchor
 - 2023-2024: Launch Nonprofit Organization Collaboration; Launch Business Collaboration
 - 2024-2025: Launch Funder Collaboration; Launch Government Collaboration
 - 2025-2026: Launch Individual Collaboration (Note: UNA will likely engage individuals throughout the strategic planning period)
2. Deliver Existing UNA Programs with a Focus on Nonprofit Capacity Building, Revenue Generation, and Alignment with New Strategic Vision
3. Enhance Nonprofit Member Benefits by Refining and Expanding Suite of Exclusive Programs, Resources, and Opportunities
4. Increase UNA Operational Capacity to Reduce Administrative Burden and Streamline Operations
5. Generate Revenue for the Organization from Memberships, Fee-for-Service Programming, and Benefit Partnerships

6. Continue Developing Advocacy Capacity and Programming to Increase UNA's Visibility, Awareness, and Support of Nonprofit Advocacy Issues and Opportunities
7. Fund Development to Grow and Diversify Revenue Streams
8. Expand Capacity, Composition, and Engagement of the Board of Directors to Support All Initiatives

Strategic Goal 1: Launch Cross Collaboration Project by Community Anchor

- 2023-2024: Launch Nonprofit Organization Collaboration; Launch Business Collaboration
- 2024-2025: Launch Funder Collaboration; Launch Government Collaboration
- 2023-2026: Launch Individual Collaboration

Strategy Summary

The ultimate goal of the Cross Collaboration Project is to build and support a diverse, connected community of stakeholders, working in concert to aid and nurture all of Utah. UNA seeks to accomplish this by increasing communication and resource-sharing, encouraging collaboration, reducing redundancies, calling for greater transparency and accountability, and broadly connecting and elevating Utah's nonprofit community in service of innovation and nonprofit sustainability. In order to launch this effort, however, UNA is adopting targeted short-term goals in line with this strategic planning period.

Intended Outcomes for Stakeholders

As a result of engaging in the Cross Collaboration Project, nonprofits will feel more connected to UNA and each other, routinely communicate with peer organizations, pursue collaborative strategies, share resources, attract and retain talent, and enhance their service delivery. Businesses will benefit from increased visibility, contributions to member training, enhanced reputation through positive branding, and more effective engagement with their nonprofit customers. Funders will more effectively partner with prospective grantees and will benefit from increased communication and coordination with nonprofits. Additionally, peer collaboration among funders will yield greater reach, impact, and economies of scales. Collaboration with government entities will yield equivalent results while also creating opportunities for institutional advocacy. Individuals will contribute to collaborative efforts by connecting with nonprofits, businesses, funders, and government entities.

Collaboration across anchors will benefit the community at large in many ways. Creating stronger nonprofits increases economic stability and mobility.

DEI Commitment

UNA acknowledges the importance of diversity in collaboration and the need for representation, inclusivity, accommodation, and equity across all areas of membership work. We are committed to centering and uplifting voices from underrepresented groups and will be intentional in inviting members and partners from these groups to participate in all strategies, events, and opportunities related to the Cross Collaboration Project. Our efforts will be intentional in engaging stakeholders who represent diversity of thought, values, abilities, and identities, and we will routinely measure our results and progress in including underrepresented populations in all UNA activities, training, membership, and more.

Strategic Goal 2: Deliver Existing UNA Programs with a Focus on Nonprofit Capacity Building, Revenue Generation, and Alignment with New Strategic Vision

Strategy Summary

UNA will continue operating its core programs, the UNA Annual Conference, Credential courses, trainings, events, Nonprofit Day on the Hill, and Utah Philanthropy Day with the goal of increasing participation, event registration, as well as revenue from fee-for-service, sponsorship, and other sources.

Intended Outcomes for Stakeholders

As a result of participating in UNA's core programs—the UNA Annual Conference, the UNA Credential, Nonprofit Day on the Hill, and targeted timely training—participants will deepen their knowledge, build capacity for their organizations, learn about and engage in advocacy, and build stronger relationships with peers, business members, funders, and elected officials.

DEI Commitment

UNA is committed to ensuring digital accessibility for the widest possible audience and to continually improve the user experience by applying accessibility standards to our website and digital programming. We have taken the following measures to ensure accessibility: alternate text on images, transcription on video recordings, and disability accommodation for in-person events. We recognize there are other opportunities for improvement in line with our commitment to providing inclusive, positive experiences for all program participants and stakeholders. We welcome feedback from members and partners as we continue to refine our website, communications, and program materials.

UNA will continue to engage leaders from underrepresented communities to lead conference keynotes and breakout sessions, Credential courses and trainings, and to participate in all UNA events.

Strategic Goal 3: Enhance Nonprofit Member Benefits by Refining and Expanding Suite of Exclusive Programs, Resources, and Opportunities

Strategy Summary

UNA will refine and expand the suite of member benefits to deliver greater value to existing nonprofit members and encourage new organizations to join UNA, with a goal of increasing member usage of UNA benefits.

Intended Outcomes for Stakeholders

As a result of refining and expanding nonprofit member benefits, more UNA members will engage with business partners, participate in Benefit Partner programs (e.g., UNA health insurance and 401(k) program), save money and time for their organizations, and derive greater value from UNA membership.

DEI Commitment

UNA will engage with benefit providers who acknowledge and commit to upholding the organization's values: Inclusivity, Learning, Community, Integrity, and Humility. Further, UNA will: seek funding to provide Spanish-language resources wherever appropriate; solicit input from members serving underrepresented communities to identify resource needs; engage with minority-owned businesses whenever possible to provide member benefits. We are committed to working with benefit providers who can accommodate the needs of underrepresented populations and are able to serve all UNA members regardless of age, ancestry, disability status, gender identity, marital status, medical condition, military/veteran status, national origin, race, religion, sex/gender, sexual orientation, or any other protected class or underrepresented identity.

Strategic Goal 4: Increase UNA Operational Capacity to Reduce Administrative Burden

Strategy Summary

In line with moving to a 32-hour work week, UNA will upgrade its internal systems and technology to automate routine tasks and streamline processes in order to focus time on work that benefits UNA and our members. These include, but are not limited to, enhancements to the CRM/database and website/CMS, improvements to QuickBooks, process automation, and improved participation and outcomes tracking for all trainings and events.

Intended Outcomes for Stakeholders

UNA staff will see reductions in time spent on administrative tasks and problem-solving and will benefit from greater accuracy in data management. UNA will more effectively be able to track and report on contributions, expenses, and financial data broadly. UNA Members will in turn receive better services and support from UNA.

DEI Commitment

UNA will consider supplier diversity in soliciting proposals for new service contracts and will ensure values alignment with all contracted service providers.

Strategic Goal 5: Generate Revenue for the Organization from Memberships, Fee-for-Service Programming, and Benefit Partnerships

Strategy Summary

UNA will pursue financial sustainability by continuing to offer paid membership services, programs, and benefit opportunities, with a goal of steady and sustained growth in revenue year-over-year. UNA seeks to grow revenue by increasing the number of dues-paying members, updating membership dues and profiles, offering paid trainings, pursuing revenue-sharing opportunities with peer state networks, and engaging in new Benefit Partner relationships.

Intended Outcomes for Stakeholders

As a result of increasing memberships, dues rates, and providing new programs and benefits, UNA will see year-over-year growth in unrestricted income.

DEI Commitment

UNA will be intentional in recruiting new members from underrepresented groups and in ensuring that all trainings, events, and programs continue to be accessible to the widest possible audience. Further, we believe that membership dues should not be an obstacle to joining UNA and will continue to work with organizations that are unable to afford UNA fees on a case-by-case basis. We will continue to engage professionals with diverse backgrounds and expertise to lead trainings and events, and will create inclusive, supportive, and accessible environments for all our members.

Strategic Goal 6: Continue Developing Advocacy Capacity and Programming to Increase UNA's Visibility and Expertise in Nonprofit Advocacy

Strategy Summary

UNA will advocate on issues important to all nonprofits at the state and federal levels and will support nonprofits with the skills and resources they need to advocate for their missions. UNA will develop and share nonprofit advocacy resources and will educate and engage members through Nonprofit Day on the Hill and other resources including, but not limited to, advocacy toolkits, issue briefs, letter templates, social media templates, engagement opportunities (Calls to Action), and similar content. UNA seeks to grow its expertise in nonprofit advocacy to serve as the collective voice for Utah's nonprofits in state and federal policymaking.

Intended Outcomes for Stakeholders

As a part of its own advocacy efforts and services provided to nonprofits, UNA will create and strengthen relationships with elected officials throughout the state. Nonprofits will see increases in civic engagement opportunities and potential funding. Elected officials will benefit by having a clearer understanding of the work of nonprofits and their role in our communities.

DEI Commitment

UNA advocates on behalf of nonprofit organizations and the nonprofit sector as a whole and does not endorse or advocate for any individual nonprofit mission. UNA is committed to inviting and engaging members from underrepresented groups to participate in all advocacy-related opportunities. UNA will provide members with advocacy tools and resources they need to spread awareness, inform policy makers, call for action, engage in the legislative process, communicate with stakeholders, build coalitions, and advocate for change on behalf of their constituents and communities.

Strategic Goal 7: Fund Development to Grow and Diversify Revenue Streams

Strategy Summary

UNA will continue to diversify its funding from philanthropic and corporate funders by building relationships with new grant makers, companies, and donors. In collaboration with the Board of Directors, UNA will identify new private, family, and community foundations, as well as new sources of corporate funding.

Intended Outcomes for Stakeholders

As a result of its fund development efforts, UNA will grow its restricted and unrestricted revenue and will diversify funding sources to ensure long-term sustainability.

DEI Commitment

UNA acknowledges the relationship between institutional wealth and systemic inequality and is committed to pursuing funding that allows us to deliver services in an equitable and inclusive manner, in line with our organizational values and commitment to diversity, equity, and inclusion. We will actively seek relationships with institutions that represent diverse communities and uphold our shared values. Our fundraising efforts will center on nonprofits and the communities they serve.

Strategic Goal 8: Expand Capacity, Composition, and Engagement of the Board of Directors to Support All Initiatives

Strategy Summary

UNA will recruit Board Members from all populations, cause areas, and regions to support strategic decision-making, represent UNA's nonprofit membership, and provide meaningful ways for members to engage and support the organization.

Intended Outcomes for Stakeholders

Increased board diversity will strengthen the organization and its members, improve sustainability, and will demonstrate to the community at large the value of representation. The UNA Board will be a resource that speaks to nonprofit issues across the state.

DEI Commitment

UNA will actively monitor board composition to ensure representation and inclusion of underrepresented groups, specifically in leadership and committee roles. We will actively seek relationships with institutions that represent diverse communities and uphold our shared values.