



**United Way of the
Columbia-Willamette**

United Way 2013-2016

Strategic Plan:

***BREAKING THE CYCLE*
OF CHILDHOOD POVERTY IN OUR
REGION**

Message from the President & CEO

At United Way, we believe that each of us has something to share, and that together we've got what it takes to make this the best possible community for everybody.

In a world that feels fractured and frenetically paced, one in which so many people race between obligations, many of us feel disconnected and distracted. From the time the alarm screams in the morning until we turn out the last light at night, we're plugged in, logged on, overly committed—and often missing out. Yet deep down, each of us craves connection and community; the thrill and gratification of belonging to something bigger. There's palpable energy when we come together, and momentum that pushes us towards big ideas and big ideals.

This region is our home, from Portland to Vancouver, Gresham to Sandy, Beaverton to Oregon City. The *story* of home promises a place for everyone—a place that offers security, safety, inclusion, prosperity. But too many people in our community—our neighbors, our friends and family members—aren't able to get ahead. Some are held back economically, others unable to access basic health care. Even within a single classroom, students' educational outcomes vary dramatically. A home is only as strong as its foundation, and when any one of us lacks opportunity, it affects the entire community we call home.

At United Way of the Columbia-Willamette, we stand behind the idea that each of us has something to give and, in turn, something to receive. Whether we donate money, volunteer our time and talent, or advocate for priorities that lift up everyone in our community, we know we can do more together than we can on our own. The plan we share here is about increasing our impact—but also it's about reigniting the excitement and reward of *belonging to something big*, the gratifying sense that comes when *each of us is part of a sea change*. We are better together.

United Way's focus will be reducing childhood poverty and as the data show us, the “ticket out” for low-income youth and youth of color is increased educational success. Yet, we won't stop there; we know generational poverty is a braided issue with myriad contributing factors. As such, we will array United Way's collective resources to focus on low-income children, *and also* stabilize the families that care for them, and strengthen the communities that nurture them.

We can't do it alone. We invite you to join us, as United Way leads critical conversations, inspires action, and transforms our communities to create a better home for everyone who lives here.

Together, we have the power to create lasting change, and to bring big ideas and big ideals home.

This is your United Way.



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President & CEO

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LIVE UNITED™

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Executive Summary

This document represents the culmination of over a year spent deeply engaged in strategy work to define how best to advance our mission. It draws on honest reflections by our staff and board about how effective we've been at creating desired outcomes in our community, on proven models being used by thriving United Way chapters around the country, and on the insights and expertise of hundreds of local partners who helped answer the key question: *what kind of United Way does this community want and need?*

Childhood Poverty:

Our focus will be to **break the cycle of Childhood Poverty in our region**. We will seek to move children out of poverty by 1) increasing their educational attainment, 2) supporting and stabilizing the families that raise them, and 3) strengthening the communities that nurture them.

From Fundraiser to Community Problem Solver:

Over the 20th century, United Way became the nation's strongest fundraiser, but also allowed that competency to over-shadow our real mandate to improve lives and strengthen communities. With the challenges facing our community, there's a thirst for United Way to better leverage its strong brand and deep assets to work collaboratively with community partners to both invest resources and convene, organize and support critical work.

From Transactional to Relational:

Achieving impact and a new value proposition requires a shift from two previously discrete, *transactional* business functions (fundraising and grant-making) to a more collaborative *relational* model where we engage actively with our partners to achieve the outcomes we collectively seek. By broadening beyond grant-making as the sole mechanism for affecting change, we can deepen our relevance and impact. Our tools will be:

- *Investment – raising funds and making investments to move critical work;*
- *Convening – bringing people together to share successful strategies, promising practices, challenging barriers and new resources;*
- *Volunteer Service – mobilizing people to meet real community needs;*
- *Advocacy – eliminating systemic and policy barriers;*
- *Knowledge-sharing – developing tangible ways to share best practice, organize and “make meaning of” critical community data.*

Community Impact 2.0 – Collective Impact

United Way's assets for social change are broader than investment alone; a Collective Impact approach allows us to augment our community investments with our ability to be a convener, mobilize volunteers, leverage additional resources, and make meaning of real-time data. We will organize our efforts to reduce childhood poverty across three Portfolios, each with a different time horizon:

- *Safety Net* -- short-term investments (1 year) to meet acute and immediate needs, augmented by efforts to strengthen and better-align safety net resources and players.
- *Community Strengthening* -- mid-term investments (3-5 years) to build capacity of proven/promising non-profits working to improve academic outcomes for low-income children, stabilize their families, and strengthen the communities in which they live.

- *Transformational Initiatives* -- long-term partnerships (5-10 years) focused on investing in and collaborating with a cohort of community partners to move youth and families out of poverty.

Measures of Success:

Impact –

- Successful Kids – increased academic success for low-income youth
- Stable Families – increased economic and housing stability
- Connected Communities – deepened engagement & strengthened fabric of supports

Trust – community perception of UW as trusted and effective engine for community change

Engagement – depth of connection to donors, volunteers and community

Revenue – increased *mission-oriented* dollars to activate this strategic plan

A Note on Equity and Community

We take the "United" in our name to heart: for over a century, United Way has demonstrated the strength and value of community by inspiring those who have the resources to give to those who have the need within their community. In serving the four-county region, UWCW recognizes that we are, in important ways, a single community, and that *the health and well-being of all of us is inextricably linked*. At the same time, we know that within our region, there are particular communities—defined by race, ethnicity, and culture, or defined by other things entirely, such as disability or sexual orientation—with very specific needs, and with important perspectives. Thus, in this document, as in our work, we speak both of "community" to recognize our interconnectedness and shared well-being, and of "communities" to recognize the places where disparate experiences, perspectives, and needs must be taken into account, and where our rich diversity must be an asset if we are to ensure the well-being of the region as a whole.

United Way is committed to equity in every aspect of our work, from our interactions with the public to our engagements with donors and our allocation of resources across communities. We must serve the most disadvantaged and disenfranchised groups in our region effectively, and we know that focusing on race and ethnicity is critical to ending the historical and social inequities that continue to exist in our region. People of color disproportionately suffer greater disparities in health outcomes, graduation rates, household income, and general well-being. When we address these inequities and improve outcomes for those facing the greatest disparities, our whole community benefits.

We also know that tremendous assets exist within traditionally under-served communities. Within these communities are our current and future community leaders, thought leaders, and community change-agents. United Way is eager to work with diverse communities and individuals as partners, donors and volunteers. Our strength will only grow as we deepen our team in these ways.

This commitment to advancing equity, strengthening communities, and moving people out of poverty guides our work. UWCW strives to reflect the demographics of the community on our board, our staff, in our funding decisions, and in our community engagement efforts. We incorporate equity principles and practices in our human resources hiring, promotion, and retention policies and hold ourselves accountable for creating UWCW's culture of diversity and inclusion.

Why Childhood Poverty?

According to a recent report by *Children First of Oregon*, nearly 44% of kids in Oregon live in poor or low income households, with almost 23% living in poverty. These figures put us near the bottom when we compare ourselves to other states across the country. More localized, 33% of all youth in Clackamas and Washington counties, and 46% in Multnomah County —*nearly half* of all our kids!—are poor or low-income. Across the river in Clark County, 49% of persons living in poverty are younger than 25 years of age, and the overall poverty level rose nearly 64% between 2000 and 2010.

Poverty has an immense impact on our community, and *a disproportionate impact on communities of color and recent immigrants*. We know there is a direct correlation between poverty and negative outcomes across almost every indicator of health, stability and success — from education to wellness, from housing to employment, from crime to happiness — people in poverty are worse off than those who are not.

Consider this from Greater Portland Pulse regarding the impacts of child poverty in our region:

Children who live in poverty are much more likely to experience marginalization from society than are their wealthier peers, whether due to unemployment, incarceration, low educational attainment, or early childbearing. Evidence shows that poverty has a strong impact on the later achievement of children, which affects their economic mobility . . . Child poverty rates tell how well our current policies and institutions are preparing us for long-term health and prosperity.

What if we could reverse the impacts of poverty in a single generation? What if we might, through strategic investments and focused interventions, support families facing generations of poverty in their efforts to break the cycle moving up and out of poverty?

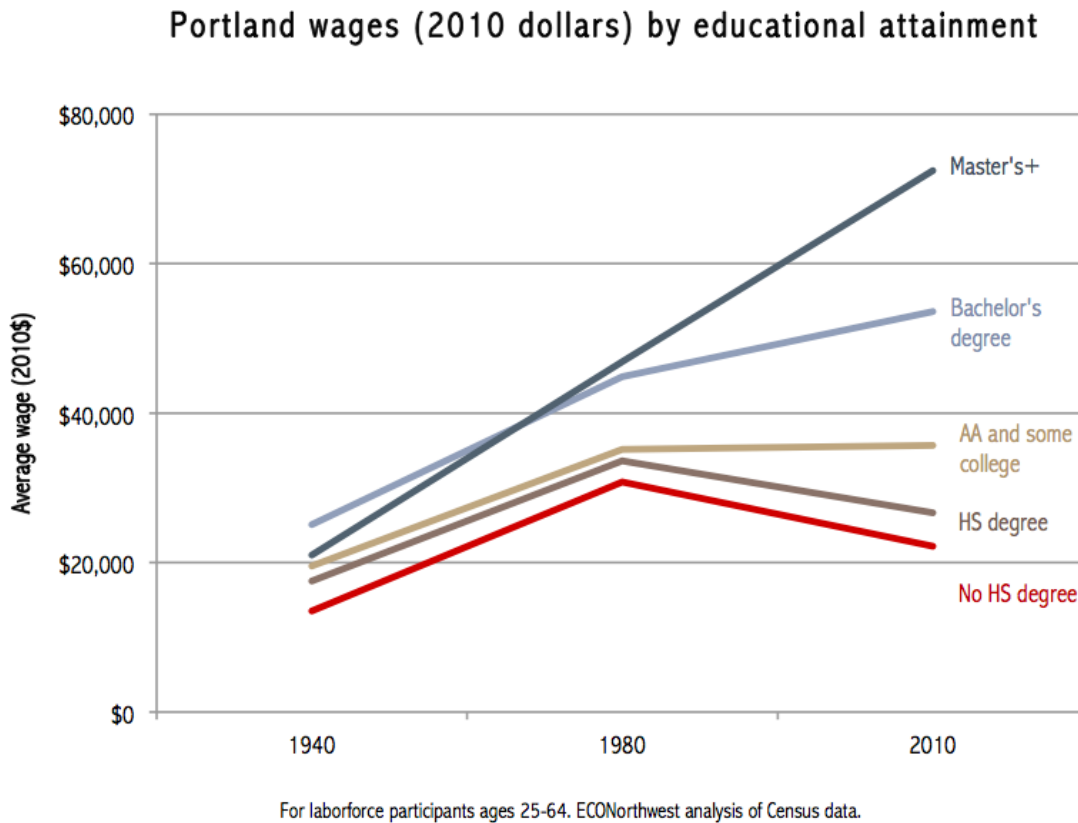
There are just over 92,000 kids in our region living in poverty right now (that's 1 in 5). If the United Way and our partners can reach 5,000 of these kids and increase their family income by \$10,000, the impact on the kids, their families and our economy would be profound. Using research conducted for the IRS by Raj Chetty from *Harvard University*, *ECONorthwest* provided us with the following analysis of impact for these 5,000 kids:

1. *An immediate increase in their academic achievement* leading to a real increase in the number of these kids who can be expected to attend college — almost 200 more.
2. *A decrease in the chances the girls will have teenage pregnancies*, potentially further perpetuating the cycle of poverty.
3. *In aggregate, a \$150,000,000 increase in expected life time earnings for these 5,000 kids!*
4. Most importantly, *a break in the persistent generational cycle of poverty*. Not only would these kids be better off, but so would their kids, and those that follow.

We recognize that any effort to end childhood poverty can't focus solely on kids. As such, our strategy has three connected elements: ***Successful Kids, Stable Families, and Connected Communities***. This gives us both breadth and depth, as well as short-term interventions coupled with medium and long-term game-changing solutions.

Successful Kids – increased school success, H.S. Graduation & Post-Secondary Education

The greatest single ticket out of poverty for a child is a high school diploma and, when possible, higher education. As the following data show, earning power for high school dropouts tailed off dramatically after 1980; today, a young person who fails to get a high school diploma is effectively doomed to poverty:



United Way’s first focus will be to invest in and work with partners that support student success, high school graduation, and successful career/college transition. As the above suggests, when we help a child succeed in school, we significantly increase lifetime earnings in our community, a material impact in taxes, buying power and overall economic vitality for these future parents and residents, and a corollary reduction in government spending as they no longer need or are eligible for social programs.

Stable Families – Stable Housing, Increased Job Skills & Increased Household Earnings

Families living on the margin benefit greatly by even small investments and interventions. As the Harvard research above validates, a small increase in household earnings can change the likely trajectory for an entire family from a perpetual struggle in poverty to increased academic success, lifetime earnings, and quality of life. Increasing access to the Earned Income Tax Credit (EITC) can provide this lift. EITC has been hailed, by liberals and conservatives alike, as the nation’s single greatest anti-poverty strategy, putting dollars directly into the pockets of our most poor, stimulating local economies, and supporting employment. Yet, locally, vast numbers of eligible families fail to receive their EITC credit (as much as \$5800!). Those dollars are lost to these adults, their children, and our local economy.

By working with an array of partners, we can increase the number of qualified families who gain the EITC and put thousands more into their pockets, hundreds of thousands into their neighborhoods, and literally millions more dollars into our overall economy. Working in parallel with partners across the Housing and Workforce continuums, we can develop a more integrated system for our region that would both increase access to affordable housing and ensure deeper job skills and employability.

These are short and medium-term strategies with immediate benefits to children, families and communities. EITC dollars and more stable housing strengthen families economically and provide needed continuity for employment and kids' education.

Connected Communities – Services, Opportunities & Supports for Success

A measure of strong communities is the degree to which people volunteer, supporting their neighbors to build a connected fabric of organizations and programs that reach everyone in a community from children to the elderly.

In the communities where many of us live, there's a rich array of service, opportunities and supports that ensure kids' success. Parents and adults actively engage in the school community; volunteers coach athletics and provide enrichment activities. Committees, coalitions and advocacy groups provide voice and meaningful ways for people to take ownership of their community.

In communities living in poverty, these assets are too-often lacking or absent. To complement our youth and family strategies, we will invest in and support efforts to “wrap around” youth and families the additional fabric of supports that we know strengthen communities, provide greater sense of pride and self-efficacy. This will look different in different communities, especially in diverse communities, but our efforts will focus on surfacing systems for community members to volunteer, to be active leaders, and to build a common voice for change within these communities. We will engage positive adults in the lives of children, and will also provide young people with opportunities to give back and to lead.

This strategy allows us our greatest breadth to engage the *entire* community. While we focus laser-like on increasing outcomes for children and their families in poverty, our Connected Communities strategy allows us to engage all people: elders, veterans, the disabled. Each of these constituencies has both something to give and something to receive; done right, they both benefit from the increased array of services in their communities and also are empowered to engage in new, meaningful ways.

Conclusion –

Focusing on children in poverty today decreases the impacts of poverty for all of us down the road. No other issue area provides the both visceral resonance with donors as well as the opportunity for deep social and economic impact across the short, medium and long-terms. By increasing academic achievement, earnings power, family stability, and productive contribution for specific children, families and communities, we can also have a dramatic impact on the broader community as well. We can increase the contribution to public resources and decrease the need for social services. We can break the cycle of poverty in one generation and will reap the benefits of this across the region. In this focus and this work, United Way, can be a catalyst for something big—a community game-changer. This is the right time and place to make a stand.

Who We Are: United Way Then and Now

Mission

At United Way of the Columbia-Willamette (UWCW), our mission is clear: **we improve lives, advance equity, and strengthen communities by mobilizing the caring power of people across our metro area.**

We bring to this mission a legacy of trustworthiness and achievement that has served the region for nearly a century. We also bring new energy and deepened rigor, with a focus on improved community and partner engagement and a commitment to meet the challenges of today—and anticipate what the region we all call home needs to build for tomorrow.

A Unique Geography & Assets: UW as Connector

United Way occupies a unique piece of landscape, sitting squarely at the intersection of our region's corporate, non-profit and philanthropic sectors. This position affords us the opportunity to build connectivity and linkages in ways few other organizations can:



Yet, for much of the 20th century, United Way defined itself more narrowly: raising money and making grants to non-profits. In 2013, we recognize that to continue to be relevant, we must do more than simply raise money and give it away. This approach hasn't achieved the kind of

systemic change our community wants, nor does it maximize the resources at United Way's disposal.

We believe that because of United Way's unique position in the community and the breadth of "tools" we have in our toolbox, we are positioned to take a broader approach to systemic, community transformation by acting as a funder, convener, collaborator and incubator.

From Fundraiser to Community Problem-Solver:

Shifting from a transactional, fundraising-focused organization *to a collaborative community problem-solver* is a significant shift for United Way.

While we were founded 126 years ago with the ethos of a community-based organization we quickly became a powerful fundraiser (today, United Way is the world's largest charity, raising nearly \$5 billion per year globally). As our fundraising success grew, we allowed that competency to overshadow our greater purpose: improving lives and building strong communities. United Way became a transactional organization, handling hundreds of local campaigns, processing thousands of donations efficiently and expeditiously, and transferring hundreds of millions of dollars each year. Despite this success as a trustworthy steward and reliable motivator for giving, we too-often missed the opportunity to do the work most-needed by the communities we serve. Now, and in the decade ahead, raising a lot of money alone is not enough. Our community isn't "getting ahead" the way we need and want; disparities are growing at alarming rates. **An organization with United Way's horsepower, assets, and reach must be willing to adopt a new approach to achieve better outcomes.**

The strategic plan presented here outlines a new way of working for us, internally and externally, to improve the impact of our efforts—and to strengthen the well-being of our region. Achieving this impact requires a shift from merely making and monitoring grants to engaging actively with our community partners to achieve the outcomes we collectively seek. Although in the past our organization approached resource development and resource allocation as discrete and disconnected functions, moving forward we will follow the lead of successful United Ways across the system and better-integrate these efforts, as we galvanize the giving of time, money, and influence across the region to effect the real, positive changes we want to see in our diverse communities.

Today, we begin thinking about *doing* along with *dollars*, about how to enlarge the definition of *giving* to focus more sharply on *achieving*. ***United Way will continue to be a world-class fundraiser. But a focus on impact will drive that fundraising.*** The community will help us shape an agenda for impact focused on moving children out poverty. We will catalyze this agenda by mobilizing our robust fundraising capacity, to ensure our region has financial resources to solve its most intractable problems. And we will complement our fundraising efforts by providing the supports and services necessary to realize these solutions.

When we are successful, United Way will be a community-owned engine for action, investment and transformation.

What We Will Do:

The Next Generation of Community Impact

Relevancy & Impact

United Way begins our new phase committed to one big goal: breaking the cycle of childhood poverty in our region (by creating a thriving region of successful kids, stable families, and connected communities). That goal will guide our work—and it will define the measures of our success.

At the heart of our new approach to Community Impact is the shift from being a transactional player to a relational partner. United Way will continue our long tradition of making significant investments across our region, but we are now committed to focusing our investment to achieve a specific outcome: Reducing Childhood Poverty. And we will expand the tools we use to achieve that outcome, augmenting our financial investments with strategic convening, volunteer resources, knowledge and data sharing, and policy work.

A Portfolio for Community Transformation

While a reduction in childhood poverty will be the highest-level outcome we seek, we recognize that the factors that contribute to poverty are myriad, they range from short-term and acute challenges to long-term and systemic, and they extend beyond any individual child. As such, our approach will focus in three areas:

- ***Successful Children*** – academic success, high school graduation and a successful career/college transition are the keys to a lifetime of employability, increased earning power, and stability.
- ***Stable Families*** – increased job skills, stable housing and EITC access are foundational to moving families out poverty.
- ***Connected Communities*** – An array of services, opportunities and supports for low-income children and families provides both a critical safety net and promotes sustained efforts to become economically stable.

The specific outcomes in each of these three areas will be identified in partnership with the communities we serve, and will correlate to reducing childhood poverty.

Short-, Mid-, and Long-Term Approaches:

To effectively span the need for short-, mid-, and long-term approaches, our work will be comprised of three interrelated strategies:

Transformational Initiatives – 5-10 Year Partnerships

Real change—the kind that remedies the root causes of educational, economic and health failure, and that creates dramatic systemic improvements—requires greater time, more resources, and better coordinated efforts. Through UW’s Transformational Initiatives, we

will make long-term commitments to achieve systemic change on poverty in our region. In keeping with our belief that the best solutions come “up and out of” communities, we recognize that these initiatives can't be ours alone; they must be a collaborative effort, initiated by a cohort of strong community partners to address specific goals: successful kids, stable families and connected communities. United Way will serve as both a funder and central convener, to increase efficiencies, align efforts, and leverage resources across the partnership, and across the region. *Using the collective impact model that has proven successful in communities throughout the country, we will partner across sectors and jurisdictions, to direct expertise, dollars, advocacy, volunteer hours—and whatever other inputs are identified as critical—to achieve outcomes audacious enough to change the odds for entire communities.* We will track and share data over the duration of these initiatives, to accelerate what's working—and address what isn't.

Community Strengthening – 3-5 Year Partnerships

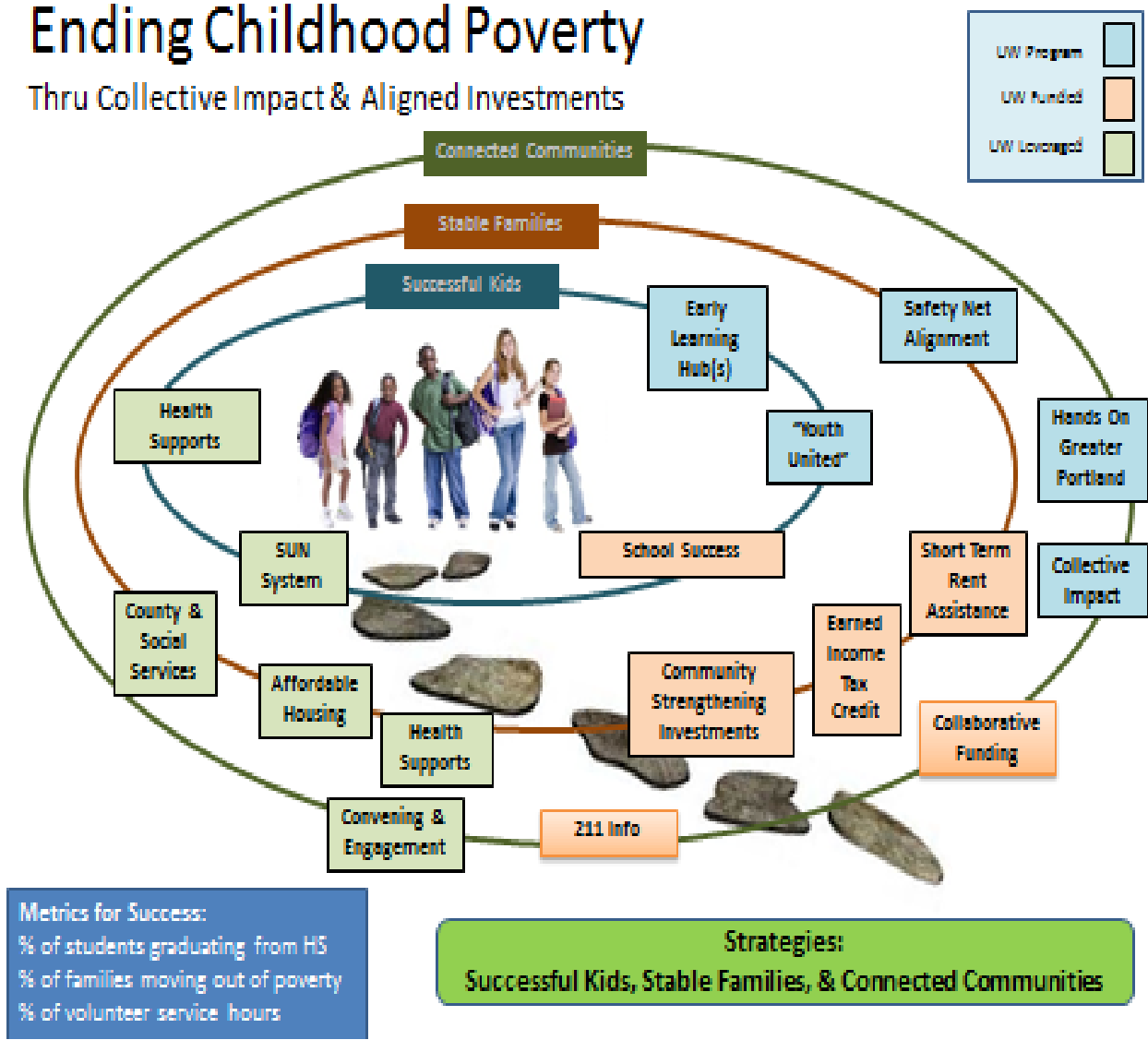
Since 2001, UW has used our Community Impact model to provide multi-year grants to non-profits addressing Education, Income and Health needs in our region. Through our Community Strengthening fund, we will continue this important work, elevating the rigor and accountability by which we select and support non-profits. *To strengthen community organizations across the four counties, we will make 3-5 year commitments to support cohorts of organizations that have proven their ability to address specific issues related to childhood poverty (academic success, family stability, strong communities). Our commitment will include financial support, opportunities for peer learning across organizations, and advocacy.* Strategic, extended support can give these successful organizations the tools and resources to work more deeply, more broadly, and more effectively in our region. We know the best solutions lie within our communities, and we want to ensure the organizations doing the best work have the capacity to effect the greatest change possible. Indeed, the success of our own transformational initiatives will depend upon the strength and effectiveness of the non-profits that serve the region.

Community Safety Net – 1 Year Partnerships

For decades, United Way has played a critical role in sustaining and strengthening our community's safety net, providing critical aid for our most vulnerable families. This remains an important role for United Way. Now, we will augment our investments by building better linkages among the players and resources that comprise the net. Thus, *while we will continue to make investments to meet housing, food, heat, utilities, and other basic needs, we will work in partnership with providers – social service organizations, cities, and counties – to improve alignment and collaboration, to ensure families receive comprehensive, consistent services.* A safety net must address acute crises, but a more strategically aligned safety net can be a key component in moving families out of poverty, and thus in stabilizing communities. The mid- and long-term success of our Community Strengthening efforts and our Transformational Initiatives will, we hope, reduce the growing pressures on the community safety net.

Ending Childhood Poverty

Thru Collective Impact & Aligned Investments



New Ways of Work: Collective Impact

Collective impact is not a program, but an organizing principal; a means to better align and focus the work of a multi-partner collaboration toward a specific, shared outcome. It relies on a strong “backbone organization” to help hold the center and marshal the work by often serving as convener, constantly aligning efforts, and consistently sharing data and decision-making resources. United Way is well-positioned to play this kind of role and has the unique additional

advantage that, through our powerful fundraising engine, we can not only convene the work, but also help fund it.

Focusing on collective impact requires major shifts in the way we work. A shift from solely grant-making in an issue area to investing and partnering to achieve specific short-, medium-, and long-term outcomes connected to childhood poverty. A shift from devoting most of UWCW's staff time to making and monitoring grants to applying staff time to more active engagements with partners to effect real change. A shift from United Way working in isolation to United Way being a collaborative partner to help drive community-identified and community-owned solutions.

| Traditional Approach | | Collective Impact Approach |
|--|---|--|
| Broad funding strategy | ➔ | Funding aligned with community change strategies |
| Investments are programmatic and unaligned | ➔ | Investments are systemic and aligned with intended outcome |
| United Way owns the effort | ➔ | Community owns the effort |
| Resources = money | ➔ | Resources = people, relationships, expertise, service, & money, etc. |
| UW is funder/fundraiser | ➔ | UWCW plays any roles necessary |
| Asks donors for money once a year | ➔ | Creates long-term relationships with diverse community investors |
| Operates as two separate businesses – fundraising & grant-making | ➔ | Cross functional teams work together to mobilize awareness, engagement, & giving |

How We Will Fund It: Resource Generation to Activate the Vision

Inverting the Paradigm: Our Vision for Impact Drives Fundraising

Historically, United Way’s approach to community impact and investment has been reactive: wait to see how much the fundraising campaign raises and that amount became “how much work we could do” in the community. Annual campaign goals were driven largely by the impetus to surpass last year’s total rather than a compelling vision for the impact we want to make in the community in the years ahead and a correlated set of fundraising goals.

Our new portfolio model inverts that paradigm. *Now, working with our partners, we will clearly identify the outcomes we seek to achieve in the years ahead (through each short-, mid-, and long-term strategy area) and identify the resources our community will need to achieve them.* These amounts –taken individually as discrete sub-campaigns or collectively as a total goal for Resources Under Management (RUM; the undesignated dollars available to activate United Way’s Community Impact work)—become the focus of our messages and efforts in our fundraising. Thus, it’s no longer about wanting to raise \$25 million because that’s larger than the \$23.6 we raised last year. Instead, it’s about raising \$X million to fund improvements to the community’s Safety Net that will stabilize low-income children and families; \$Y million to invest in sustaining and scaling our community’s most impactful non-profits; and \$Z million to invest in an array of Transformational Initiatives that strengthen communities over the longer term and re-write the script for kids and families in poverty.

Crowd-Sourcing the Community’s Good Intention

We will make a shift in how we think about and communicate this work. In the past, it was the *United Way* campaign and we talked about *United Way’s* goals. Looking ahead, our role is to articulate the *community’s* needs and the *community’s* goals. Our job, as trusted partner will be to connect donor’s intention to make a difference with what we know and what our partner’s tell us are “real world needs” on the ground. Then, inspire, impel and invite the broadest array of donors possible to join us, to “link arms” and be a part of something bigger –to pool individual donations with thousands of others and achieve greater focus and out-sized impact.

What About Designations?

This approach neither seeks to eliminate nor diminish designated donations (gifts donors make *through* United Way to a specific non-profit of their choosing). Rather, United Way will more proudly tout these gifts as an important part of our role and success: because of United Way, we passed \$12 million in unrestricted support to hundreds of local non-profits this year! What this approach does do, however, is allow us to stop worrying about designations; designated gifts have risen steadily over the last decade and we expect them to remain strong. Rather than trying to stem the tide, we must focus on sharpening *our message* for the work United Way and our partners seek to do, and in more clear and compelling ways, invite donors to join us there.

Not Just Workplace Giving Anymore: Four Resource Strategies

Since its inception, United Way has relied on the Workplace Giving model of fundraising. While Workplace Giving continues to be a powerful engine for mobilizing donors, it cannot be the sole revenue-generator to fund our new vision. As such, in the years ahead, we will both focus on enhancing the Workplace Giving platform while also developing new revenue models to help us pass more dollars to key community partners working to end Childhood Poverty.

Enhanced Workplace Campaigns

Following proven practices from leading United Ways across the country –practices that have been shown to deepen partner engagement and increase RUM—United Way will shift our approach from exclusively campaign-focused, transactional relationships with corporate partners (where the “relationship” revolves exclusively around the 1-2 weeks/year of campaign) to a relational, year-round approach where United Way is a partner in delivering a Corporate Social Responsibility agenda. Our fundraising staff will be relationship managers and have smaller portfolios; they will work with corporate partners to develop annual plans that include volunteerism, employee education and engagement, employee giving, and United Way’s ability to be a brand ambassador for our partners.

“Give Big”

Give Big mobilizes thousands of people –on a single day—to support their community. The power and value for UWCW is that it is a means by which we can reach donors – new and existing—*outside of* Workplace Giving.

This program has successfully taken root in multiple US cities, most close to home Seattle. In 2011, The Seattle Foundation launched the program and raised \$3.6 million for hundreds of community non-profits. In 2012, Give Big raised \$7.4 million for 1,100 non-profits; and, this year, it raised over \$9 million. During this time, The Seattle Foundation’s name recognition has doubled from 22% to 44%. The Foundation’s investment of \$120,000 returned a total promotional value of \$2.1 million and an audience reach of 137 million interactions. #GiveBig trended number one on Twitter all day in Seattle on GiveBig day (May 15th) making 2.8 million impressions with 1.3 million followers over 24 hours.

Simply, Give Big is the most significant opportunity for UWCW to:

- Increase visibility and re-position our brand;
- Act as a broad mobilizer and be seen as a community problem-solver;
- Reach donors outside of the traditional Workplace Giving model;
- Quickly accelerate giving to our identified Community Funds.

Major Donors

United Way has a strong cadre of individual and major donors, many of whom have supported United Way for decades. However, cultivation and expansion of this donor pool has been a secondary focus to Workplace Giving. This represents an opportunity for United Way moving forward, to not only better engage existing major donors but to invite new donors to join this work as well. United Way offers these donors the

opportunity to invest in a coordinated campaign with a strong backbone organization and a “mutual fund” of the community’s strongest and non-profits.

Federal and Private Grants

Leading United Ways across the country have demonstrated success in leveraging new funds for their communities through federal grants and private national funders. United Way’s brand remains strong and respected at the national level, and the organization is well positioned to advocate for and secure these investments.

| 3-Year Pro Forma | | | | | | | |
|-------------------------------------|----------------------|--|---------------------|---------------------|---------------------|-------------------|-------------------|
| Community Funding Goals | | Resource Development Strategies | | | | | |
| | Campaign 2012 | Workplace | Major Donors | Give Big | Grants | Other Rev | Reserves |
| <i>Community Funds Subtotal</i> | \$ 5,691,243 | \$ 4,826,035 | \$ 865,208 | \$ - | \$ - | | |
| UW Overhead | \$ 3,600,000 | \$ 3,500,000 | \$ - | \$ - | | \$ 100,000 | \$ - |
| RUM | 9,291,243 | \$ 8,326,035 | \$ 865,208 | \$ - | \$ - | \$ 100,000 | \$ - |
| Designations | \$ 12,395,278 | \$ 11,745,278 | \$ 650,000 | | | | |
| Campaign Total | \$ 21,686,521 | \$ 20,071,313 | \$ 1,515,208 | \$ - | \$ - | \$ 100,000 | \$ - |
| Community Funding Goals | | Resource Development Strategies | | | | | |
| | Campaign 2013 | Workplace | Major Donors | Give Big | Grants | Other Rev | Reserves |
| Safety Net | \$ 2,400,000 | \$ 1,700,000 | \$ 300,000 | \$ 200,000 | \$ 200,000 | | |
| Community Strengthening | \$ 2,300,000 | \$ 1,700,000 | \$ 300,000 | \$ 300,000 | | | |
| Transformational Initiatives | \$ 2,500,000 | \$ 1,400,000 | \$ 500,000 | \$ 300,000 | \$ 300,000 | | |
| <i>Community Funds Subtotal</i> | \$ 7,200,000 | \$ 4,800,000 | \$ 1,100,000 | \$ 800,000 | \$ 500,000 | | |
| UW Overhead | \$ 3,900,000 | \$ 3,100,000 | \$ 200,000 | \$ 100,000 | | \$ 200,000 | \$ 300,000 |
| RUM Goal | 11,100,000 | \$ 7,900,000 | \$ 1,300,000 | \$ 900,000 | \$ 500,000 | \$ 200,000 | \$ 300,000 |
| Designations | \$ 13,000,000 | \$ 12,300,000 | \$ 700,000 | | | | |
| Campaign Total | \$ 24,100,000 | \$ 20,200,000 | \$ 2,000,000 | \$ 900,000 | \$ 500,000 | \$ 200,000 | \$ 300,000 |
| Community Funding Goals | | Resource Development Strategies | | | | | |
| | Campaign 2014 | Workplace | Major Donors | Give Big | Grants | Other Rev | Reserves |
| Safety Net | \$ 2,950,000 | \$ 1,700,000 | \$ 300,000 | \$ 750,000 | \$ 200,000 | | |
| Community Strengthening | \$ 2,750,000 | \$ 1,700,000 | \$ 300,000 | \$ 750,000 | | | |
| Transformational Initiatives | \$ 3,550,000 | \$ 1,450,000 | \$ 1,050,000 | \$ 750,000 | \$ 300,000 | | |
| <i>Community Funds Subtotal</i> | \$ 9,250,000 | \$ 4,850,000 | \$ 1,650,000 | \$ 2,250,000 | \$ 500,000 | | |
| UW Overhead | \$ 3,990,000 | \$ 2,835,000 | \$ 200,000 | \$ 250,000 | | \$ 450,000 | \$ 255,000 |
| RUM Goal | 13,240,000 | \$ 7,685,000 | \$ 1,850,000 | \$ 2,500,000 | \$ 500,000 | \$ 450,000 | \$ 255,000 |
| Designations | \$ 14,170,000 | \$ 13,420,000 | \$ 750,000 | | | | |
| Campaign Total | \$ 27,410,000 | \$ 21,105,000 | \$ 2,600,000 | \$ 2,500,000 | \$ 500,000 | \$ 450,000 | \$ 255,000 |
| Community Funding Goals | | Resource Development Strategies | | | | | |
| | Campaign 2015 | Workplace | Major Donors | Give Big | Grants | Other Rev | Reserves |
| Safety Net | \$ 3,200,000 | \$ 1,700,000 | \$ 300,000 | \$ 1,000,000 | \$ 200,000 | | |
| Community Strengthening | \$ 3,200,000 | \$ 1,700,000 | \$ 300,000 | \$ 1,200,000 | | | |
| Transformational Initiatives | \$ 5,000,000 | \$ 1,500,000 | \$ 1,500,000 | \$ 1,200,000 | \$ 800,000 | | |
| <i>Community Funds Subtotal</i> | \$ 11,400,000 | \$ 4,900,000 | \$ 2,100,000 | \$ 3,400,000 | \$ 1,000,000 | | |
| UW Overhead | \$ 4,309,000 | \$ 3,009,000 | \$ 200,000 | \$ 400,000 | | \$ 700,000 | |
| RUM Goal | 15,709,000 | \$ 7,909,000 | \$ 2,300,000 | \$ 3,800,000 | \$ 1,000,000 | \$ 700,000 | \$ - |
| Designations | \$ 14,045,000 | \$ 13,245,000 | \$ 800,000 | | | | |
| Campaign Total | \$ 29,754,000 | \$ 21,154,000 | \$ 3,100,000 | \$ 3,800,000 | \$ 1,000,000 | \$ 700,000 | \$ - |

How We Got Here: Who We Engaged & What We Learned

In order to serve the community, UWCW needs to listen to the community. We began the groundwork for developing this strategic plan in early 2012, as Keith Thomajan took the role of president and CEO. The process, while developed and owned by United Way staff and guided by our board of directors, has been intentionally inclusive and broad. This approach marks the first step in making real our promise that UWCW will be an *outward-facing organization* that engages more collaboratively and that acts with an understanding that the best solutions are often those that come up and out of the community.

Best Practices Across the United Way System:

UWCW's new leadership team benefitted from both a strong national organization (United Way Worldwide) that is setting the pace for change across the UW system, as well as from a number of innovative United Way's that have adopted some or all of the strategies in our plan, and have seen increased relevancy and impact as a result.

United Way of Salt Lake City (UWSLC) – Start with a Compelling Community Vision

UWSLC established itself as that community's backbone organization and community problem-solver by developing a compelling, collaborative vision for improving Childhood Success. With that vision in place –and the enthusiastic support of the social service sector—UWSLC chose to expand their resource strategy beyond workplace giving and conducted their “Changing the Odds” Campaign with a goal of \$10M to fund their new partnerships. The campaign surpassed its goal and enabled UWSLC to expand its community partnerships. **LESSON: a clear and compelling vision for community impact drives successful fundraising.**

United Way of King County, Seattle (UWKC) – A Bold “Stake in the Sand”

To increase their relevancy, UWKC established a defining “priority issue” of Ending Homelessness. UWKC and its partners laid out big goals for the development of 1,000 new housing units to move people off the streets and established a fundraising campaign to achieve it. The community response was profound. At the end of the campaign, the community doubled its objective, building 2,000+ new units. **LESSON: an inspiring, audacious goal captures the community's imagination and rallies people to the cause.**

United Way Greater Portland, Maine (UWGP) – Enhanced Workplace Campaigns

Recognizing that in the 21st century, companies have sophisticated Corporate Social Responsibility (CSR) programs and are looking for United Way to be more than an organization to process employee donations, UWGP successfully made the shift to an *Enhanced Workplace Campaign* model. UWGP Relationship Managers are the engine to help their corporate partners achieve their CSR goals. No longer is the relationship focused on solely the one or two weeks each year when a company runs a campaign but instead involves an array of strategies and activities annually. While employee giving remains a central strategy, Enhanced Workplace Campaigns include employee engagement and education, volunteerism, and United Way's

strategic work to serve as a brand ambassador in the larger community. **LESSON: corporate partners want an annual CSR partner, not solely an entity to process donations.**

United Way of Los Angeles (UWLA) – Grants Bring “New Dollars” to the Community

Many United Ways across the country have developed ambitious visions for community transformation and have sought resources beyond their workplace giving campaigns to fully activate and fund the work. Because United Way’s brand is strong and it is seen as a trusted convener and neutral community agent, it is well positioned to seek and receive sizable state and federal grants, as well as significant contributions from private national funders. United Ways from Los Angeles to Detroit, from San Francisco to Phoenix have all augmented their allocable dollars through six- and seven-figure grant streams. **LESSON: United Way can bring “new dollars” into a community through relationships with federal and national funders.**

Who We Engaged in Our Community:

Staff

The entire UWCW staff reflected on the need for organizational transformation to meet current and emerging needs across our community, while studying best practices being used by United Way chapters around the country. Staff shaped the Mission/Action/Values statement to guide our work (Appendix). Following board approval of these elements, senior leadership identified the key innovations, new lines of business, and organizational strategies reflected in the Strategic Dashboard (Appendix). This work drives 1-year operations plans developed by staff teams, delineating UWCW's deliverables and timelines for FY13/14.

Board of Directors

At a summer 2012 retreat, our board reviewed and affirmed "United Way: Position & Approach," a document outlining the organization's historic role and suggesting ways to increase our relevancy and impact. Board members engaged around strategic tensions and critical decision points. In the ensuing months, the board continued to provide critical parameters and directives, and offered insight and ongoing guidance.

External groups and individuals

Through one-on-one conversations, focus groups, targeted task forces, and community conversations, UWCW engaged with the following constituencies:

- Corporate partners—those who lead the corporations who support our work, along with the donors and volunteers who connect with UWCW through their workplaces.
- Long-time individual donors—representatives with deep United Way history who offered valuable insight into our relationships and value proposition.
- Nonprofit leaders and community partners—the nonprofit providers, government, K-12 and postsecondary systems, and faith-based organizations who provide both perspective on the range of needs across the region and on-the-ground partnering to meet those needs.
- Communities of color—although UWCW's equity statement leads us to seek diversity across the many groups with which we engage, we also recognized the need to work specifically with leaders from the communities of color whose perspective must inform the equity-driven work we will do.

- Clients/recipients—we recognize that listening to those we fund and serve is critical to ensuring UWCW works effectively to achieve the outcomes we all seek.

A detailed list of people, partners and organizations whose input informed this plan appears in the Appendix.

The qualitative feedback from the community engagement process was vital to the development of this strategic plan. We combined this input with quantitative data about changing demographics, income levels, educational outcomes, and economic needs in our region. The data confirm that as our population grows, the region is becoming more diverse—and disparities in education, income, and health are worsening. (Citations for these resources and additional data can be found in the Appendix).

What we learned: Themes

Not surprisingly, we heard a great deal about how the economic downturn continues to affect individuals, families, particular sectors, and the region as a whole. These responses underscore the economic reality in which we and our partners are working. But what was especially significant were insights that helped us better understand how to refine the role UWCW plays and the approach we take, so that we can better meet what are deep, continuing, and growing needs across the region. These insights revealed four related concerns: disparities, disconnection, discrete engagements, and disjointed efforts.

Disparities

Over and over, we heard confirmation of what we know to be true: residents of our region face profound disparities in education, health, and economic attainment. Race remains the primary indicator for how well—or poorly—individuals, families, and communities fare. These disparities are not getting better; indeed, in many ways they are worsening.

Lesson: UWCW must put equity at the center of our work, in order to effect real transformation across the region.

Disconnection

Whether a household is faring well or poorly, there is a greater sense of disconnection. The pace of life and the ubiquity of technology leave people feeling frenzied and less connected to their neighbors, their communities, and the issues that matter.

Lesson: UWCW should deepen opportunities for connection across our region and promote an agenda of positive transformation.

Discrete individual/corporate engagements

People and organizations want to help, but the standard model of an annual one- or two-week campaign doesn't make the best use of the resources our region has to give, nor does it deliver the results our region needs.

Lesson: UWCW can better serve the region—and its own mission—by deepening our value proposition. Through collective impact, we can provide a more relational model for marshaling resources, we can help corporations meet their social responsibility goals, and meet the deepest needs across the region.

Disjointed social sector efforts

Although many social sector organizations are working diligently to address the needs of our region, efforts across the sector are fractured and disjointed. Nonprofit leaders noted they are too often competing for much-needed support rather than collaborating to meet shared goals and achieve better outcomes. Few large-scale organizations are positioned both to invest in community-based organizations and to collaborate to organize and elevate what works. As a result, the overall effectiveness of our social sector isn't as effective as it could be.

Lesson: UWCW should step forward to meet this need, by acting as a convener and providing the impetus and structure to realize the promise of collective impact for our community.

Citations & Appendices

Citations:

- United Way Worldwide – *Report from the US Task Force: Working Together to Drive Results Across Communities*, 2012. <http://www.unitedway.org/pages/u.s.-task-force-on-united-ways-economic-model-and-growth>
- ECONorthwest – *Potential Impacts of UWCW's Anti-Poverty Initiatives*, 2013.
- Children First for Oregon – *Status of Oregon's Children*, 2012. http://www.cffo.org/site/download/county_data_books
- Clark County – *Poverty in Clark County*, 2012. <http://www.clark.wa.gov/community-action/documents/2012UpdatetoPovertyinClarkCountyFinal.pdf>

Appendices –

- **United Way Strategic Dashboard**
- **Mission/Action/Values**
- **Additional Data Synopsis**
- **Roster of Participants**
- **United Way Board Roster**

United Way Strategic Dashboard

The Strategic Dashboard organizes United Way’s staff work and ensures that we remain focused on our new value-proposition to stakeholders: deepened **Impact**, an inspiring **Experience**, and consistent **Excellence**. Lines of Business focus staff on work that furthers Key Strategies and move us –United Way and the Community—to the outcomes we seek.

| | | | | | | | | | |
|------------------------|---|--|---|--|----------------------------|--|--|---|--|
| COMM. OUTCOME | REDUCTION in CHILDHOOD POVERTY | | | | | | | | |
| ORG.-LEVEL OUTCOMES | <i>United Way leads measurable community mobilization & transformation.</i> | | | <i>United Way is a reliable & trusted partner, connector, communicator & problem-solver.</i> | | | <i>A diverse, inspired team who consistently exceeds our community's expectations.</i> | | |
| MEASURES | Impact / Revenue (R.U.M.) / Brand Recognition & Trust / Supporters (Donors & Vols.) | | | | | | | | |
| STRATEGY-LEVEL OUTCOME | Successful Children, Stable Families, Connected Communities | Effective & Adaptive ideas to solve community problems | Resources, volunteers & partners to create measurable impact. | A trusted connector and expert community leader | UW is a great communicator | Widely known and viewed as trustworthy creative, and inclusive | Deliver excellence & highest-stewardship of resources every day | Diverse, inclusive, learning culture | |
| KEY STRATEGIES | <i>Collective Approach for Measurable Change on Highest-Priority Community Issues</i> | <i>Innovation Hub: Research & Evaluate</i> | <i>Activate giving to Catalyze Impact</i> | <i>Deliver High Value to All Stakeholders</i> | <i>Tell Great Stories</i> | <i>Create new UW Brand Experience</i> | <i>Foster High Performing, Nimble, Adaptive Organization</i> | <i>Create and Sustain a Great Culture</i> | |
| LINES OF BUSINESS | Community Collaboration / Community Investment / Volunteerism / Data & Knowledge Sharing / Corporate Relations / Donor Relations / Financial Stewardship / Marketing & Communications | | | | | | | | |
| PILLARS | IMPACT | | | EXPERIENCE | | | EXCELLENCE | | |

UWCW's Lines of Business

UWCW understands that to serve our community effectively, we must do more than raise and distribute funds. Our lines of business describe the core functions and competencies for our organization, particularly in relation to how we will work in partnership to achieve our community’s goals.

- Community Collaboration

Using the theory of collective impact, we will seek community-based solutions to our region's biggest challenges. UWCW will operate as a partner to activate systemic change by bringing our money, time, expertise, and commitment to community issues.

- Community Investment
Building on our established position as a successful fundraiser, we will enhance the systems and infrastructure needed to access and direct the right resources towards achieving clearly defined outcomes.
- Volunteerism
With the integration of Hands On Greater Portland, we are well positioned to expand and strengthen volunteerism and service in the community. In addition to bringing needed labor to our partners, volunteerism builds a sense of connection and improves understanding of the needs of the most disadvantaged across our community. We will emphasize these aspects of volunteerism, and we will expand the use of volunteerism for leadership development, particularly with young people.
- Data and Knowledge Sharing
Data is an increasingly important tool for philanthropy and the social sector, yet accessing and making meaning of relevant data remains a challenge. We will gather, analyze, and interpret data from across our region, and serve as a hub to share critical knowledge and proven strategies to improve community decision-making and encourage replication of promising practices.
- Marketing and Communications
We will share inspiring stories as a way of demonstrating what works, and building support to accelerate proven strategies. We will clearly communicate who we are, what we do, why it matters, and what impact we and our partners are having on our community, building a trusted brand across generations of donors.
- Donor Relations
Individual donors have long supported UWCW, and they will be increasingly important as we implement our Portfolio for Community Transformation. Building on the idea that we are stronger together, we will seek to inspire donors to join us.
- Corporate Relations
Corporate giving continues to be central to UWCW, and as we move from a transactional/annual campaign approach, our relationship with corporate partners will deepen. As trusted advisors and consultants, we will support our corporate partners in achieving all of their Corporate Social Responsibility goals – giving, education & engagement, volunteerism, and brand ambassadorship.
- Financial Stewardship
For nearly a century, United Way has been entrusted with the financial resources of our donors. While we celebrate the caring and charitable side of our business, good intentions are no substitute for solid business practices. Maintaining low overhead, unqualified audit opinions, leveraged impact, and transparent management of resources continues to be critical for our success. Making the community aware of our processes for sound financial management will build our brand, and help us attract the contributions—and the partners—to achieve better outcomes across the region.

Mission/Action/Values

Mission:

Improve lives, strengthen communities, and advance equity by mobilizing the caring power of people across our metro area.

Action:

- **Ignite** a community-wide social movement thereby mobilizing thousands to action—to give, advocate and volunteer—to improve the conditions in which they live;
- **Galvanize** and connect all sectors of society—individuals, businesses, nonprofits, faith communities and governments—to create long-term social change that produces healthy, well-educated and financially stable individuals and families;
- **Raise, invest and leverage** millions of dollars annually to create and support innovative programs and approaches to generate sustained impact in local communities;
- **Hold ourselves accountable** to our steadfast commitment to equity, and continually measure improvement in education, financial stability and health.

Values:

- **Collective Impact** – We are better together; United Way inspires people to get involved and focuses our collective resources for amplified results.
- **Equity** – We recognize inequities in our community and will prioritize our resources to level the playing field for those communities most impacted by these inequities.
- **Service** – We believe volunteerism transforms our communities and ourselves.
- **Connection** – Our portfolio of relationships—corporate, nonprofit, government, faith and philanthropic—are unique and strengthen our ability to collaborate, convene, leverage and achieve change.
- **Integrity** – We act with integrity that justifies trust, and take responsibility for our relationships and results.
- **Innovation** – We support new and better ways to solve old problems.
- **Pursuit of Excellence** – We adapt and learn, from both our successes and mistakes.
- **Passion** – We are tenaciously committed to a better community and to building a modern United Way to drive positive social change.

What the Data Tell Us: Demographic Changes & Growing Disparities

- **Our population is growing and becoming increasingly geographically dispersed**
From 1990 to 2010, the total population of our region grew from 1.4 million to just over 2 million. Although all four counties had significant population growth, Multnomah County, which in 1990 was home to 41% of the region's entire population, is now home to only 36% of the total population, followed by Washington County (26%), Clark County (21%), and Clackamas County (18%).
- **Our population is increasingly diverse**
In 1990, 91% of the people living in the four-county region were white. By 2010, only 80% were. While we are still less diverse than other regions, largely due to historic reasons, there is significantly more diversity across each county today than even a few years ago.

In 1990, only 124,000 residents identified themselves in a category other than white; by 2010, over 400,000 did. In that time, the black/African American population and the American Indian/Alaska Native population both grew by more than half, and the Asian/Pacific Islander population more than doubled. Most significant was the near quintupling of the Hispanic/Latino population, from 46,000 to 225,000. In 1990, just 3% of the region's total population was Hispanic/Latino; by 2010, 11% was.

- **Economic disparities by race/ethnicity persist**
14% of our region lives in poverty—but the percentages range quite dramatically across racial/ethnic groups. 39% of Hispanics/Latinos, 31% of blacks/African Americans, and 21% of American Indian/Alaska Natives in our region live in poverty.
- **Disparities in education outcomes by race/ethnicity persist**
Oregon ranks 4th worst in the nation for high school graduation rates, and is lowest in the nation in graduating white students on time. Rates plummet for kids of color, with only 58% of Latino students graduating on time (4th worst in the nation); 78% of Asian students (9th worst); and 54% of African-American students (3rd worst). Portland's overall on-time graduation rate was 63% in 2012, among the worst in the state, with 68% of white students graduating on time; 54% Hispanic; 52% African-American; 74% Asian/Pacific Islander; and 29% Native American (a staggeringly low rate of success). While rates are stronger in Clark County, they remain unacceptably low, with Vancouver 78% rate lagging the overall state average with rates for kids of color (county-wide) ranging between 62-68%.
- **Economic disparities by education level are increasing**
Education outcomes have a profound, lifelong impact on income. Between 1940 and 1980, wages in our region rose steadily for all levels of educational attainment. In 1980, wages began to decline steadily for those who didn't finish high school or who have only a high school diploma. As a result of racial/ethnic disparities in education outcomes, whole communities are trapped in generational poverty. *See p. 8 for detailed data/graph.*

Corporate Leaders

| <i>Name</i> | <i>Company/Organization</i> |
|-------------------|----------------------------------|
| Roger Hinshaw | Bank of America |
| Nichole Frisch | Bank of America |
| Monique Barton | Bank of America |
| Elise Bouneff | Bank of the Cascades |
| Peter Potwin | Benson Industries |
| Deanna Haley | Boeing |
| Mark Ganz | Cambia Health Solutions/ Regence |
| Don Antonucci | Cambia Health Solutions/ Regence |
| Jeff Ogle | City Center Parking |
| Rodrigo Lopez | Comcast |
| Theressa Davis | Comcast |
| Martin Daum | Daimler |
| Dave Dahl | Dave's Killer Bread |
| Cal Collins | Esco Corporation |
| Jim Rudd | Ferguson Wellman |
| Melinda Merrill | Fred Meyer |
| Brian Stewart | JP Morgan Chase |
| James Curleigh | Keen Footwear |
| Brian Rice | KeyBank |
| Carol Jackson | Macy's |
| Jim Mark | Melvin Mark Properties |
| Michael Sheridan | Merrill Lynch |
| Deena Pierott | Mosaic Blueprint |
| Sarah Mensah | Nike |
| Gregg Kantor | NW Natural |
| Dr. Joe Robertson | OHSU |
| Martin Revoal | Pacific Benefit Planners |
| Kevin Stein | PCC Structurals |
| Sandi McDonough | Portland Business Alliance |
| Rob Smith | Portland Business Journal |
| Merritt Paulson | Portland Timbers |
| Christa Thoeresz | Portland Timbers |
| Mike Golub | Portland Timbers |
| Traci Rose | Portland Trail Blazers |
| Tripp Somerville | Pyramid Communications |
| Don Kraher | Schwabe Williamson & Wyatt |

Community Leaders

| |
|--------------------------|
| Ken Thrasher |
| Eric & Ronna Hoffman |
| Carolyn & Jack McMurchie |
| Marcia Randall |
| Eric H.I. Hoffman |
| Phyllis Lee |
| Bianca Schwaffermann |
| Bola |
| Carl Talton |
| Carmen Rubio |
| Chris Dunnville |
| Daniel Ledezma |
| Gerald Deloney |
| Jason Lim |
| Jesse Beason |
| Joseph Berezinskiy |
| Julia Meier |
| Kayse Jama |
| Lee Po Cha |
| Matt Morton |
| Maxine Fitzpatrick |
| Nichole Maher |
| Serena Wesley |
| Sherry Addix |
| Steffeni Gray |
| Terry Cross |
| Thomas Aschenbrener |
| Victoria Libov |

| | |
|-----------------|---------------------------|
| Carol Mangan | Sterling Bank |
| Jackson Hataway | Strategic Arts & Sciences |
| Curt Blutworth | Tektronix |
| Chris Andersen | The Oregonian |
| Bob Speltz | The Standard |
| Don Pearson | Wells Fargo |

Social Sector Leaders

| <i>Name</i> | <i>Company/Organization</i> | <i>Name</i> | <i>Company/Organization</i> |
|--------------------|------------------------------|-------------------------|-----------------------------|
| Liesl Wendt | 211 | Jeff Anderson | Oregon Community Fdtn. |
| Tom Chamberlain | AFL/CIO | Celeste Janssen | Oregon Mentors |
| Chris Krenk | Albertina Kerr | Linda Nelson-Solares | PANOW |
| Dan Ryan | All Hands Raised | Alan Yordy | Peace Health |
| Andy Nelson | Big Brothers, Big Sisters | Carole Morse | PGE Foundation |
| Derenda Schubert | Bridge Meadows | Traci Manning | Portland Housing Bureau |
| Rob Justus | CASH Oregon | Carole Smith | Portland Public Schools |
| Pietro Ferrari | Catholic Charities | Lorenzo Poe | Portland Public Schools |
| Ed Blackburn | Central City Concern | Wim Wiewel | Portland State University |
| Tim Leavitt | City of Vancouver, WA | Sheila Martin | Portland State University |
| Ann Lininger | Clackamas County | Bill Baney | Portland State University |
| Vanessa Gaston | Clark County | Lawrence Wallack | Portland State University |
| Julia Meier | Coalition of Comm's of Color | Maree Wacker | Red Cross |
| Cynthia Addams | Collins Foundation | Tom Soma | Ronald McDonald House |
| Gary Withers | Concordia University | Jeff Curtis | Rose Festival |
| Kurt Ferre | Creston Dental Clinic | Barbara Hall | Schnitzer CARE Foundation |
| Jan Wilson | EarthShare | Tony Hopson | SEI |
| Margaret Hinshaw | Elevate Oregon | Chris Otis | SMART |
| Catherine Willmott | Gladstone School District | Mark Holloway | Social Venture Partners |
| Bob Stewart | Gladstone School District | Earl Blumenauer | State of Oregon |
| Joyce White | GOSW | Israel Bayer | Street Roots |
| Steve Rudman | Home Forward | Swati Adarkar | The Childrens Institute |
| Mark Langseth | I Have a Dream | Bernie Foster | The Skanner Newspaper |
| Susan Stoltenberg | Impact NW | Sherrie Brach | United Way Worldwide |
| Mark Blattner | Jewish Federation Portland | Louise Kenney | United Way Worldwide |
| Vickie Burns | Labor's Community Service | Mike Alexander | Urban League Portland |
| Carmen Rubio | Latino Network | Steven Webb | Vancouver School District |
| Dev Dion | Loaves & Fishes | Karin Kelley-Torregroza | Vision Action Network |
| Kevin Palau | Luis Palau Association | Kay Toran | Volunteers of America |
| Doug Stamm | Meyer Memorial Trust | Bill Rhoades | West Linn School District |
| Martha Richards | Miller Foundation | Kathryn Jackson | Work for Art/RACC |
| Joanne Fuller | Multnomah County | Andrew McGough | Worksystems, Inc. |
| Peggy Samolinski | Multnomah County SUN | Agnes Zach | WVDO |
| Steven Moore | Murdock Charitable Trust | Bob Hall | YMCA |
| Jim White | NAO | | |

| | |
|---------------------|-----------------------------|
| Matt Morton | NAYA |
| Rick Nitti | Neighborhood House |
| Jeanne Kojis | Non-Profit Network of SW WA |
| Nichole Maher | NWHF |
| Thomas Aschenbrener | NWHF |
| Duncan Wyse | Oregon Business Council |
| Max Williams | Oregon Community Foundation |

Grp./Company Meetings

Intel
Hill2 Consulting
Pyramid Communications
Clackamas County
Nonprofit Focus Group
Clark County Nonprofit
Focus Group
Multnomah County Nonprofit Focus Groups
Washington County Nonprofit Focus Group
White House Community Conversations

UWCW Community Diversity Advisory Committee

| Name | Company/Organization |
|-------------------|-------------------------------------|
| Bandana Strestha | |
| Nickole Cheron | City of Portland |
| Galina Burley | Clackamas County |
| Scott Hatley | Incight, Inc |
| Djmet Doge | IRCO-Africa House |
| Salma Ahmad | Islamic Society of Greater Portland |
| James Uyeda | Japanese Garden |
| Juan Carlos Ocana | Multnomah County |
| Anita Yap | Oregon Health Authority |
| Lily Caceres | Oregon Youth Authority |
| Erna Gelles | Portland State University |
| Tana Atchley | Portland State University |
| Cynthia Gomez | Portland State University |
| Debra Porta | Pride NW |
| Ana Spain | Univision KUNP |
| Lakeitha Elliott | Urban League |
| Naomi Morena | Washington County |

Board of Directors

Roster 2012-2013

Brett Baker

Senior VP, Private Client Manager
US Trust, Bank of America

Kerry E. Barnett

EVP and Chief Legal Officer
The Regence Group

Eric Brown

VP Recruitment Process/Planning
American Red Cross

Rob Davison

Executive Vice President
NW Equity Holdings Inc.

Jill Eiland (Exec Comm At Large)

Corporate Affairs Manager
Intel Corporation

Tom Elmer

Senior Vice President, District Credit Officer
KeyBank

Andrew Frazier

Managing Partner
Frazier Hunnicutt

Lilisa Hall

Director, Strategic Partnership Outreach, Pacific
Power & Executive Director, & Foundation
Pacific Power

Dr. Lesley Hallick (Exec Comm At Large)

President
Pacific University

Scott Hatley

Founder/Board Member
Incight Company

Jon Huddleston

Director, Deliver Gas Process
NW Natural

Al Jubitz

Founding Director
Jubitz Family Foundation

Dwight Kelly

Operations Manager, Oregon District
UPS

Norwood Knight-Richardson, M.D.

Vice President /Chief Administrative Officer
OHSU

Kristin Lewis

Vice President
Wells Fargo Bank

Jaime Lim

Publisher
The Asian Reporter

Barbara Mathey (Treasurer)

President/CEO
IBEW & United Workers Fed Credit Union

Jocelynne McAdory (Secretary)

Senior HR Consultant
Kaiser Permanente

Mary Monnat

President and CEO
LifeWorks NW

Michael Montgomery

Vice President and Oregon Manager
Community Development
U.S. Bank

Perry Moore
Director/General Manager
The Boeing Company Portland

Larry Paulson
Community Leader
Vancouver, WA

Keith Ristau
President
Far West Fibers, Inc.

Glenn Rodriguez, M.D.
Chief Medical Officer
Providence Health Systems

Sabrina M. Rokovitz (Chair)
VP and General Manager
Enterprise Rent-a-Car

Bob Tackett
Executive Secretary/Treasurer
NW Oregon Labor Council

Tony Trunzo
Flir Systems, Inc.
SVP Finance/CFO

David Willmott
Blount Industries
President/COO

Ex Officio – Non Voting
Keith Thomajan