



**United Way
of Pennsylvania**

Roadmap to Recovery 2021 - 2022

Approved by the Board of Directors on December 3, 2020

Our Mission

To champion United Way as a leader and partner in building more financially resilient families and thriving communities throughout Pennsylvania.

Our Vision

We envision an inclusive, impactful, and collaborative network of United Way agencies working with business, community, faith, and government leaders throughout the Commonwealth to advance equitable access to health, education, and financial stability for all Pennsylvanians.

Our Guiding Principles

1. Scaling impact through collective advocacy, fundraising, and partnership building.
2. Results-focused, data-driven decision-making and action.
3. A deep commitment to equity, equality, social justice, and antiracism.
4. Empathy and compassion for the people who benefit from our work.
5. Effective, transparent stewardship of public and private resources.
6. Recruiting and retaining a diverse, culturally responsive, inspired, and highly skilled workforce.

Strategic Priority 1: Advocate for ALICE

Advocate for national and state policies and resources to advance equitable opportunities and outcomes for Asset Limited, Income Constrained, and Employed (ALICE) and low-income households impacted by the COVID-19 pandemic.

1. Generate and distribute new research on the short, medium, and long-term economic impact of the pandemic on ALICE and low-income households.*
2. Create and mobilize bipartisan support for a state and federal policy agenda focused on the economic, educational, and health needs of ALICE and low-income households.*
3. Establish and lead a bipartisan coalition to successfully advocate for a state Earned-Income Tax Credit for workers and their families.
4. Provide current federal and state policy news, information, and advocacy support to members.

*Goal requires additional Board guidance and support for implementation.

Strategic Priority 2: Strengthen 211

Strengthen the capacity of 211 to serve as the leading resource for information and referral services for residents and communities throughout Pennsylvania.

1. Secure and distribute more federal and state funding from grants and service contracts to support 211 operations in every region of Pennsylvania.
2. Raise public and policymaker awareness of the essential value of 211 statewide in response to the current COVID-19 pandemic and to future public health crises and natural disasters.
3. Generate and distribute more 211 data and information related to the ongoing and unmet health, housing, and human service needs of Pennsylvania residents, especially ALICE and low-income households.
4. Build new statewide partnerships with other information and referral systems to help Pennsylvania residents find and navigate a broader set of resources related to the social determinants of health that promote their safety, well-being, and quality of life.

Strategic Priority 3: Help Member Agencies Thrive

Help United Way of Pennsylvania member agencies to recover from, rebuild, and thrive after the COVID-19 pandemic.

1. Provide technical assistance and support to members for digital marketing, advocacy, fundraising, and forming strategic alliances upon request.
2. Create more opportunities for member to member networking, information sharing, and peer learning in-person and online.
3. Focus learning and professional development conferences, workshops, and trainings on 1) economic recovery from an unprecedented public health crisis that deepened financial instability for ALICE Pennsylvanians and 2) advancing racial and social equity in light of the inequities magnified by the pandemic.
4. Temporarily implement more flexible annual renewal policies for members that need more time to pay their annual membership fees as a result of the impact of COVID-19 on their fundraising efforts.*

*Goal requires additional Board guidance and support for implementation.

Strategic Priority 4: Pursue Excellence

Pursue organizational excellence in every aspect of leadership, operations, and organizational culture.

1. Ensure the physical and mental health and safety of our staff, volunteers, and members during the COVID-19 pandemic.
2. Foster inclusive and authentic relationships with partner organizations and communities led by people of color, people who identify as LGBTQIA+, and all people who have been historically marginalized and/or have experienced systemic discrimination.
3. Diversify the Board of Directors to be more inclusive and representative of state level policymakers, funders, and thought leaders.*
4. Maintain the organization's financial stability while pursuing new mission-aligned growth opportunities.

*Goal requires additional Board guidance and support for implementation.

Appendix A: Roadmap Planning Methodology

Key Informants Interviewed

Allen Norton, PA Chamber of Business and Industry
Anne Druck, United Way of York County
Anne L. Gingerich, Pennsylvania Association of Nonprofit Organizations
Bill Golderer, United Way of Greater Philadelphia and Southern New Jersey
Bill Jackson, United Way of Erie County
Bill Jones, United Way of Wyoming Valley
Bobbi Watt Geer, United Way of Southwestern Pennsylvania
Christopher Saello, United Way of Chester County
Dan LaVallee, UPMC Health Plan
David Lewis, United Way of the Greater Lehigh Valley
Gary Drapek, United Way of Lackawanna and Wayne Counties
Gayle M. Young, United Way of Lawrence County
Jane Lockard-Clawson, United Way of Indiana County
Jennifer Stavrakos, William Penn Foundation
Joanne Troutman, Greater Susquehanna Valley United Way

John Emge, United Way Worldwide
Karen Struble Myers, United Way of the Laurel Highlands
Kari King, Pennsylvania Partnerships for Children
Katie Fink, United Way of Bedford County
Kelly Malone, Schuylkill United Way
Kevin M. Ressler, United Way of Lancaster County
Kristen Huff, Wyoming County United Way
Laura Zink Marx, United Way of North Carolina
Marissa Christie, United Way of Bucks County
Maureen Noe, Indiana United Ways
Michael Rubino, United Way of Beaver County
Michelle Figlar, The Heinz Endowments
Sarah H. Berthelot, Louisiana Association of United Ways
Suzanne McCormick, United Way Worldwide
Teresa Miller, Pennsylvania Department of Human Services
Terri Ann Wig, United Way of the Titusville Region
Tim Fatzinger, United Way of the Capital Region
Will Price, United Way of Venango County

Members Surveyed (Invitation to all)

Local United Way Chief Executives: 24
Local United Way Program, Advocacy, and Administrative Staff: 24
Local United Way Board Volunteers: 16

Appendix B: Roadmap Planning Team

United Way of Pennsylvania Roadmap Planning Committee Members

Andy Dessel, Board Member and Health Innovations Manager, Central Pennsylvania Food Bank

Julie DeSeyn, Board Member and Vice President, Community Impact, United Way of Southwestern PA

Philip Falvo, Public Policy Director, United Way of Pennsylvania

Amy Hicks, Board Member and Executive Director, United Way of Franklin County

David Lewis, Board Member and President, United Way of the Greater Lehigh Valley

Amanda McNaughton, Member Services Coordinator, United Way of Pennsylvania

Will Price, Board Member and Executive Director, United Way of Venango County

Kristen Rotz, President, United Way of Pennsylvania

Consultant

Jason D. Alexander, Principal and Co-Founder, Capacity for Change, LLC