

**UNITED WAY OF
SOUTHEAST
LOUISIANA
2025 – 2027
STRATEGIC PLAN**



UNITED WAY
Southeast Louisiana

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INTRODUCTION

Letter From our Leaders



We're proud to share United Way of Southeast Louisiana's new strategic plan, a bold and actionable framework designed to move our region forward. Developed in collaboration with our partners, staff, and community members, and Ron McClain, our immediate past board chair, this plan comes at a transformative time for both our organization and our region.

For more than 100 years, United Way of Southeast Louisiana has worked to fight poverty and create a region where every person has the opportunity to thrive. We've led efforts that strengthen families, invest in resilience, and drive long-term economic mobility. And yet, in a time of rising costs, growing income disparities, and deepening barriers to opportunity, we know we must do more.

That's why this plan centers on a new Bold Goal: place 100,000 individuals living below the ALICE (Asset Limited, Income Constrained, Employed) Threshold on a pathway to prosperity by 2035.

ALICE households are made up of essential workers, caregivers, and neighbors who keep our region running but they often don't earn enough to cover the basics. When ALICE households thrive, our whole community becomes stronger.

Our strategic plan lays out how we'll get there. It sharpens our focus on the root causes of poverty and outlines how we'll align our programs, partnerships, and advocacy to create systemic, lasting change. It also includes the operational shifts we'll make to ensure United Way remains a sustainable, effective force for good for generations to come.

This plan is the result of months of collaboration, reflection, and hard work from people across our organization and community. We're deeply grateful to our staff, board, partners, and neighbors who shared their insights, and to the Trepwise team for their support throughout the process.

The road ahead requires focus, courage, and collective action. We are ready.

We have a clear goal, a strong plan, and the partnerships in place to build a future where every household in our community has the opportunity to thrive.

United is the Way.

Best,

Elizabeth Ellison-Frost, *Chair*

Michael Williamson, *President & Chief Executive Officer*

Executive Summary



Eradicating poverty in Southeast Louisiana is urgent, complex work that demands a coordinated and sustained effort across sectors and communities. **For the last 100 years, United Way of Southeast Louisiana has been a central force in uniting local organizations, businesses, and individuals in a shared mission to break the cycle of poverty in this region. Through its efforts, UWSELA connects resources to those in need, empowers individuals with critical services, and advocates for long-term systemic change.**

UWSELA has built a trusted reputation for addressing the most pressing challenges facing individuals and families in the region. Its initiatives vary widely to meet the needs of the community, from increasing access to critical health services to tackling housing instability and workforce development. As a convener and leader in the fight against poverty, the organization's impact extends beyond immediate relief efforts to drive broader, systemic change that improves the lives of all residents in Southeast Louisiana.

As the organization enters its second century of service in Southeast Louisiana, this strategic plan serves as a roadmap to chart the next phase of the organization's growth and impact. Specifically, the organization has identified the following strategic priorities to advance its mission over the next three years:

Generate Sustainable Resources

Strengthen the Team

Tell Our Story

Address Urgent Needs

Drive Systemic Change

This strategic plan was developed over the course of 10 months in collaboration with stakeholders from a wide variety of perspectives. **It provides a comprehensive framework for continuing to address the root causes of poverty in the region, positioning UWSELA to deepen its impact, sustainability, and relevance going forward. Implementing the initiatives outlined in this plan will ensure that UWSELA will further strengthen its role as a transformative leader in the fight against poverty, working to create a more just, equitable, and thriving Louisiana for all.**

Process Overview



In the spring of 2024, United Way of Southeast Louisiana embarked on a strategic planning process to guide the direction of the organization over the next three years. Organizational leaders engaged Trepwise, a New Orleans-based strategy consulting firm, to support in the development of the plan. Key organizational stakeholders engaged in a three-step process to develop this strategic plan, outlined below:

Discover

Trepwise consultants designed and ran a rigorous discovery process to understand UWSELA's organizational strengths and areas of opportunity. This process engaged a cross section of **over 140 individuals** via group interviews with key stakeholders, survey responses and in-depth research of comparable organizations and approaches.

Define

Trepwise consultants presented a discovery report based upon their findings to the UWSELA's strategic planning committee. The committee, comprised of 16 representatives of organizational staff, board, and other interested parties, then worked to **define the key strategic questions that would guide the planning process.**

Plan

Trepwise facilitators coordinated a set of **four working sessions with the strategic planning committee** to collaboratively develop the actionable strategic plan initiatives. This process also included robust conversations to prioritize and sequence the initiatives over a multi-year timeline.

2025–2027 Strategy



United Way of Southeast Louisiana is doubling down on what we do best – building stronger, more resilient communities by fighting poverty at its roots. Over the next three years, we’re focused on deepening our impact and creating lasting change for the individuals and families we serve. **That commitment is anchored by our Bold Goal: to place 100,000 individuals living below the ALICE Threshold on a path to prosperity by 2035.**

Instead of doing more with less, we’re choosing to do what works, and do it better. We’ll strengthen and expand the services and supports that are already changing lives, making sure our resources go further for the people who need them most.

This strategy is built on a core belief: real change happens when people receive comprehensive, coordinated support. From healthy communities and youth opportunities to financial security and resilient communities, we’re sharpening our focus on the key drivers of poverty. At the same time, we’ll grow our capacity to push for policy change that lifts up entire communities and removes systemic barriers to opportunity.

We know this work starts from within. To keep pace with the evolving needs of our region, we’re making strategic shifts to strengthen our organization and prepare for the future. That includes diversifying our fundraising strategy, building new revenue streams, investing in technology, and supporting the growth of our team through intentional succession planning and leadership development.

As a trusted community partner, we are uniquely positioned to understand the complex challenges facing our region. And we know the best solutions come from those closest to the problems. **That’s why our plan centers on listening to, learning from, and working alongside the people and communities we serve. We’re focused on breaking down barriers, closing opportunity gaps, and creating systems that reflect the lived experiences of Southeast Louisianans.**

Our Bold Goal is a promise to the families we serve. This plan outlines how we’ll get there, through deeper impact, smarter investments, and sustainable growth. **By the end of this three-year strategy, United Way of Southeast Louisiana will be even stronger – ready to make a greater difference in more lives and build a region where everyone has the chance to thrive.**



WHO
WE
ARE



Vision, Mission, Values, & Principles



Our vision, mission, values, and guiding principles are foundational elements of the path forward, defining the impact we will create and setting expectations for how we operate. **The work described in the strategic plan supports an ongoing commitment to carrying out our mission, achieving our vision, and living our values and principles.**

OUR VISION

Equitable communities where all individuals are healthy, educated, & economically stable

OUR MISSION

To eradicate poverty in Southeast Louisiana

OUR VALUES

Community Focused: We understand that we exist for the sole purpose of improving the lives of the people in our community.

Quality Driven: We focus on delivering excellence.

Innovative: We champion new ideas and believe in turning challenges into opportunities.

Trustworthy: We operate with the highest moral, legal, and ethical standards.

OUR GUIDING PRINCIPLES

Connectivity: We coordinate our efforts to create pathways of prosperity that are trusted, culturally appropriate, accessible, and without bias.

Equity: We strive to lift up all people and to eliminate systemic barriers to prosperity.

Lived Experience: We amplify the voices of those we are serving and allow their needs and aspirations to guide our work.

Long-Term Commitment: We commit to continuing our work until the cycle of poverty is broken, communities are thriving, and people are living prosperously.

Shared Responsibility: We believe success requires the unique contributions of the entire community, including individuals, families, schools, nonprofits, the faith-based community, funders, governments, and the private sector.

Systems Change: We embrace our work as holistic and dynamic, impacting people, place, practice, and policy.

Blueprint, Outcomes, & Pathways



OUR BLUEPRINT FOR PROSPERITY

Our Blueprint for Prosperity, outlined in part below, is UWSELA's community-informed, data-driven framework for reducing poverty and expanding opportunity across Southeast Louisiana. It identifies the conditions needed for households to thrive and highlights the systemic changes required to get there. This strategic plan builds on and helps operationalize the work of the Blueprint – translating its long-term vision into near-term organizational priorities and investments. The two are complementary and additive: **the Blueprint charts the direction; the Strategic Plan defines how UWSELA will continue moving forward on that path.**

OUR OUTCOMES FRAMEWORK

Informed by our local community and aligned with the efforts of United Way Worldwide, we work to create a Southeast Louisiana that reflects these four interconnected outcomes:

STABILITY TODAY

Families have the skills, resources, and opportunities to access basic needs

PROSPERITY TOMORROW

Families have the social, emotional, and financial assets to create a better future

PERSONAL WELLNESS

People of all ages enjoy a high quality of life and well-being

VIBRANT COMMUNITIES

All communities are safe, equitable, and thriving

OUR PATHWAYS TO REALIZING COMMUNITY IMPACT

Realizing our ambitious vision and outcomes requires an equally ambitious approach, to meet the needs of our community, we bucket our work in four key pathways to both address structural issues and solve acute challenges.

Investing in programs and collaborations focused on poverty

Inspiring others to adopt our vision

Initiating new collaborations where they are most needed

Informing others with data and innovative practices so they can accelerate their impact

Impact Areas

OUR AREAS OF IMPACT

While offerings vary across the United Way network, our collective work centers around the following impact areas. These are: **Healthy Community, Youth Opportunity, Financial Security, and Community Resiliency**

Healthy Community

Improving health and wellbeing for all

Examples of our work include:

New Orleans Mental Health Collaborative
RESOLVE
Volunteer Center
Emergency Food and Shelter Program
(temporarily paused)

Financial Security

Creating a stronger financial future for every generation.

Examples of our work include:

Prosperity Centers
VITA – Free Tax Help
IDA Projects
Moving Families Forward
Thriving African-American Small Business
Initiative
Hospitality Cares
Home for Goog
InspiredUp

Youth Opportunity

Helping young people realize their full potential

Examples of our work include:

New Orleans Campaign for Grade-Level
Reading
Ready Start Network Support
Dolly Parton's Imagination Library
Summer Impact Grants

Community Resiliency

Addressing urgent needs today for a better tomorrow

Examples of our work include:

Public Policy
Resource Navigators
Disaster Preparedness and Relief
United Way of Southeast Louisiana
Resiliency Center – Founded by Rebuilding
Together New Orleans
RETURN (Restoration & Empowerment Through
United Reentry Network)

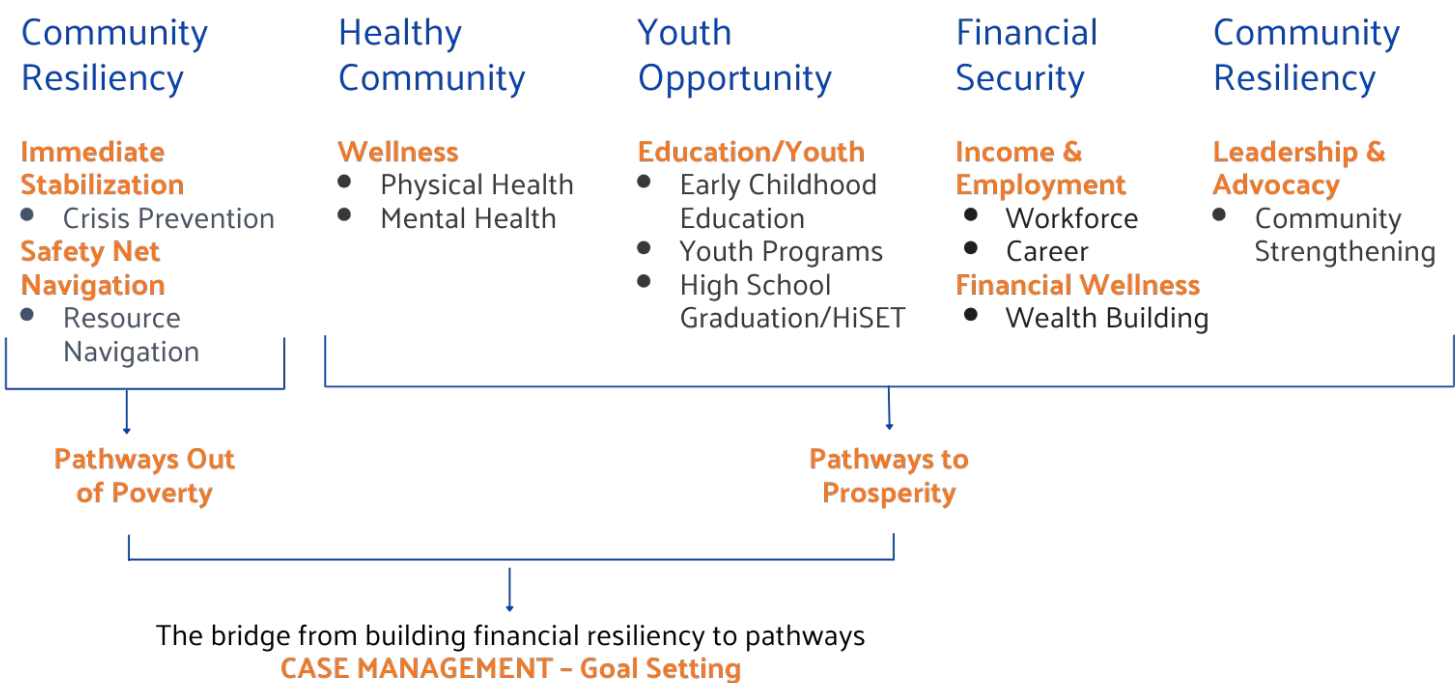
OUR 10-YEAR BOLD GOAL

100,000 individuals living below the ALICE Threshold are on a pathway to prosperity by 2035

A bold goal sets direction and drives focus, giving shape to our strategy and energy to our work. **Our aspiration to place 100,000 individuals living below the ALICE Threshold on a path to prosperity by 2035 is a unifying call to action.** It orients our strategies, shapes our priorities, and serves as a North Star to guide decision-making at every level of the organization.

ALICE (Asset Limited, Income Constrained, Employed) represents the families who earn above the Federal Poverty Level but still struggle to afford the cost of living in their parish. Households living under the ALICE Threshold including ALICE and those living in poverty. **By focusing our efforts on removing barriers and building pathways to stability for these households, we can create ripple effects to strengthen entire communities.**

To achieve our Bold Goal, **we’ve identified the greatest indicators of poverty in the parishes we serve. These areas of focus will inform our ongoing approach and will be tracked to regularly measure the impact of our strategies.** These insights will help us stay accountable to our communities, deepen what works, and course-correct when necessary.



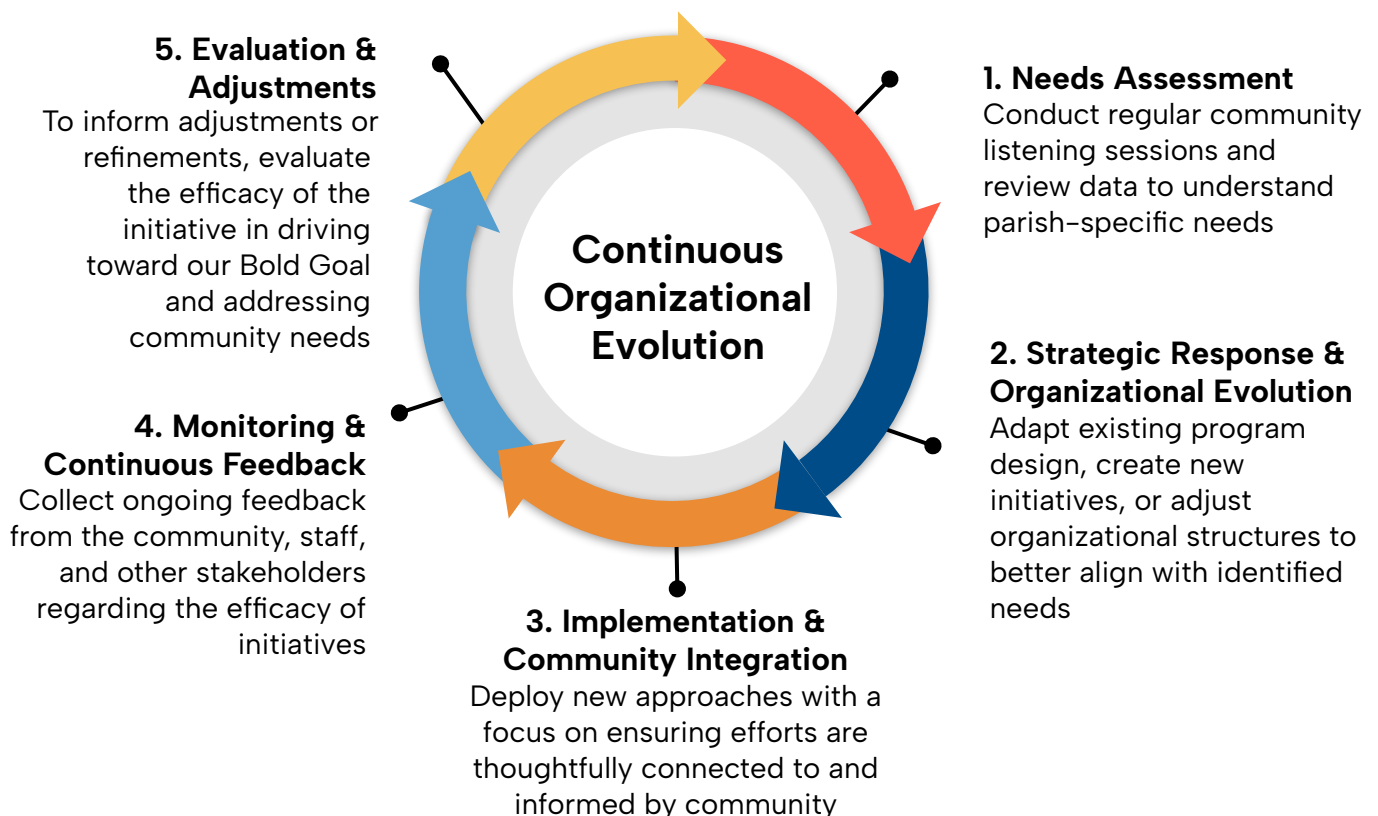
Grounded in data, informed by community voice, and aligned with our Blueprint for Prosperity, this goal helps us stay laser-focused on shifting outcomes. **We’re imagining a better future, one household at a time.**

How We Work

At United Way of Southeast Louisiana, we know that the success of our mission starts with listening. **The voices and experiences of those most impacted by poverty shape everything we do, from how we design programs to how we measure success.** By staying connected to the people and communities we serve, we ensure our work remains relevant, responsive, and rooted in real life.

We're committed to building an ongoing dialogue with the community. That means actively listening, learning, and adapting as needs evolve. Through partnerships with community leaders, direct engagement with individuals and families, and regular data collection, we keep community feedback at the center of every decision.

Our work isn't static because our community isn't. We regularly assess and adjust our strategies to meet new challenges and seize new opportunities. This intentional approach helps us strengthen the impact of our programs, improve our partnerships, and move closer to achieving our Bold Goal. Most importantly, it keeps us grounded in our mission: to fight poverty and create a Southeast Louisiana where every person has the opportunity to thrive.





OUR PLAN



PLAN FRAMEWORK

We developed our three-year strategic plan, framed by our mission, vision and values to achieve our Bold Goal. Our strategic priorities are advanced by specific initiatives and activities that tie to performance indicators.



Priorities are realized over the course of a three-year time span

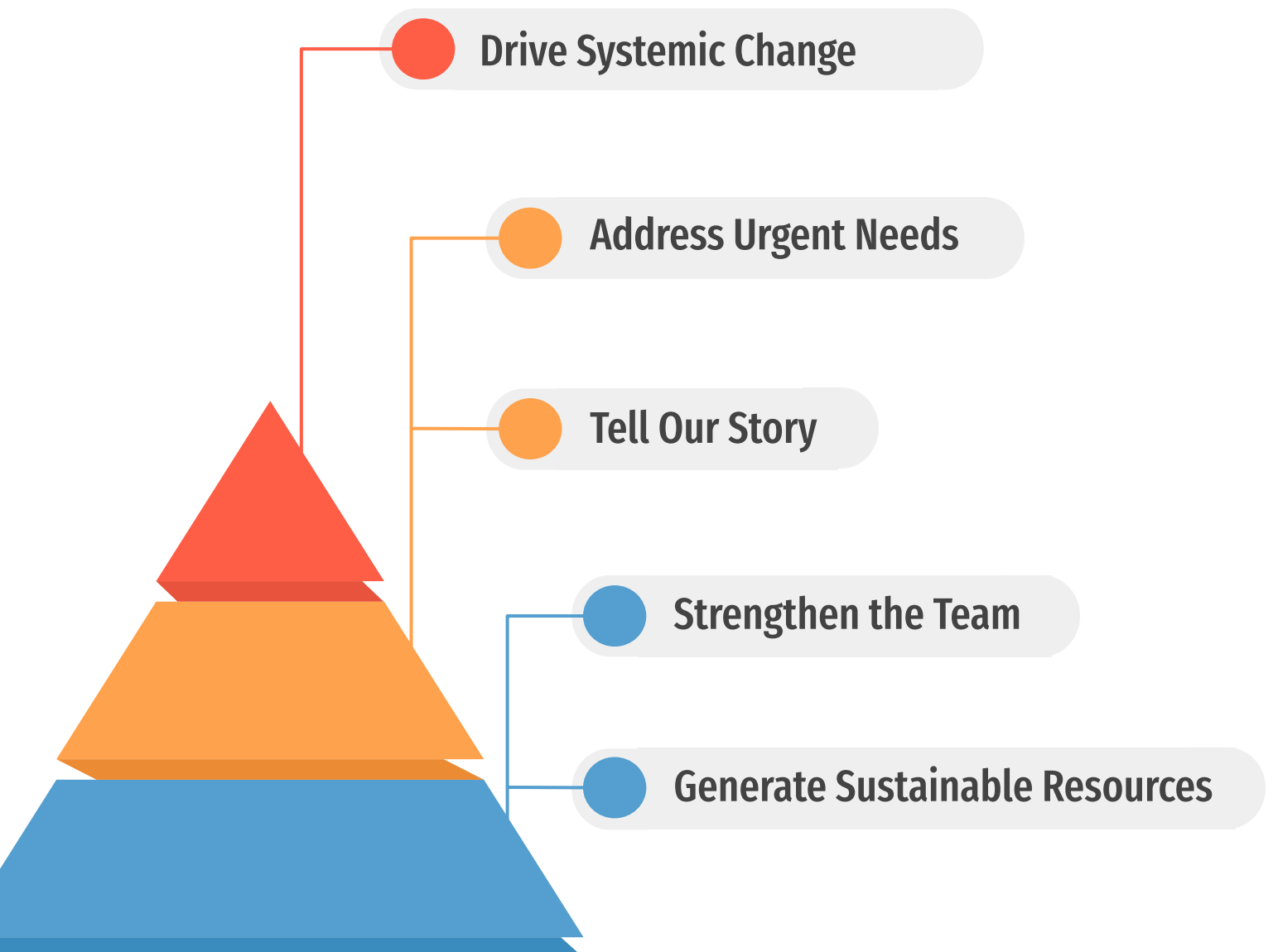
Initiatives advance strategic priorities, categorized as primary or secondary depending on their relative priority for implementation

Activities help advance initiatives, and are developed by staff throughout the life of plan implementation

PLAN PRIORITIES

UWSELA leadership and key stakeholders worked together over numerous planning sessions to identify and refine the following six priority areas of the strategic plan.

Over the next three years, we will strengthen and grow the organization's impact by implementing initiatives that advance these strategic priorities. Our priorities build on each other, ensuring all operations and activities will lead toward transformational systems-level change.



PLAN PRIORITIES

Drive Systemic Change

Update and codify our approach to driving structural change through our roles as advocate, grantmaker, and convener

Address Urgent Needs

Refine our approach to programmatic execution and grantmaking to ensure alignment with community needs, organizational values, and best practices

Tell Our Story

Define and communicate our value proposition to target audiences to maintain organizational relevance, drive funding, and broadcast impact

Strengthen the Team

Optimize organizational effectiveness in all facets of our work

Generate Sustainable Resources

Diversify revenue streams and drive long-term organizational sustainability and growth

GENERATE SUSTAINABLE RESOURCES

Objective: *Diversify revenue streams and drive long-term organizational sustainability and growth*

PRIMARY STRATEGIC INITIATIVES

- Develop and implement infrastructure to establish significant earned revenue stream and diversify funding
- Identify and pursue national foundation grants aligned with UWSELA programming and initiatives

SECONDARY STRATEGIC INITIATIVES

- Execute previously-established endowment fund
- Identify and pursue corporate sponsors aligned with UWSELA value proposition
- Identify and pursue public grant funding for projects aligned with UWSELA's Blueprint for Prosperity
- Continue to execute annual campaign with a focus on unrestricted giving



STRENGTHEN THE TEAM

Objective: Optimize organizational effectiveness in all facets of our work

PRIMARY STRATEGIC INITIATIVES

- Conduct organizational structure audit to assess need for potential re-structure to enhance capacity and management capabilities
- Engage in leadership succession planning to identify and structure a smooth transition for the next generation of UWSELA leaders
- Bolster the team by investing in competitive compensation, addressing identified staffing needs, and ensuring our staff mirrors the diversity, strengths, and stories of the communities we serve

SECONDARY STRATEGIC INITIATIVES

- Leverage tools (including artificial intelligence) to automate and optimize current workstreams
- Create forums for more effective cross-departmental information sharing
- Develop and deliver collateral for new employees to better understand scope of UWSELA work



TELL OUR STORY

Objective: Define and communicate our value proposition to key target audiences to maintain organizational relevance, drive funding, and broadcast impact

PRIMARY STRATEGIC INITIATIVES

- Rearticulate the core components of UWSELA work with a focus on promoting messaging around addressing both immediate community needs and broader systemic issues in a culturally-responsive and community-informed manner
- Identify and secure key partnerships to highlight UWSELA story

SECONDARY STRATEGIC INITIATIVES

- Launch marketing campaigns to highlight UWSELA rebrand
- Utilize Prosperity Centers to spread the word about all UWSELA services
- Develop and execute a social media campaign related to UWSELA rebrand and strategic plan launch
- Develop and execute communications and outreach plan specifically targeting elected officials to emphasize impact of systems work



ADDRESS URGENT NEEDS

Objective: Refine our approach to programmatic execution and grantmaking to ensure alignment with community needs, organizational values, and best practices

PRIMARY STRATEGIC INITIATIVES

- Utilize evaluation tool and Blueprint for Prosperity to assess the efficacy of current internal programs and projects
- Redesign program strategy based on evaluation findings
- Launch a Prosperity Center that directly serves every parish
- Build in flexibility to continue to respond to urgent, unexpected needs (including but not limited to youth opportunity, healthy community, financial security, and community resilience) through clear roles, rapid response protocols, and adaptable resource allocation

SECONDARY STRATEGIC INITIATIVES

- Codify and execute regular process for understanding parish-specific community needs through data analysis and community engagement
- Live into principles of trust-based philanthropy by simplifying the grant application and reporting process for funded partners



DRIVE SYSTEMIC CHANGE

Objective: *Update and codify our approach to driving structural change through our roles as advocate, grantmaker, and convener*

PRIMARY STRATEGIC INITIATIVES

- Deepen advocacy impact through the formalization of UWSELA's advocacy framework
- Clarify when and how UWSELA will convene relevant leaders and community organizations around key issues, and establish a standardized structure to support effective convening efforts

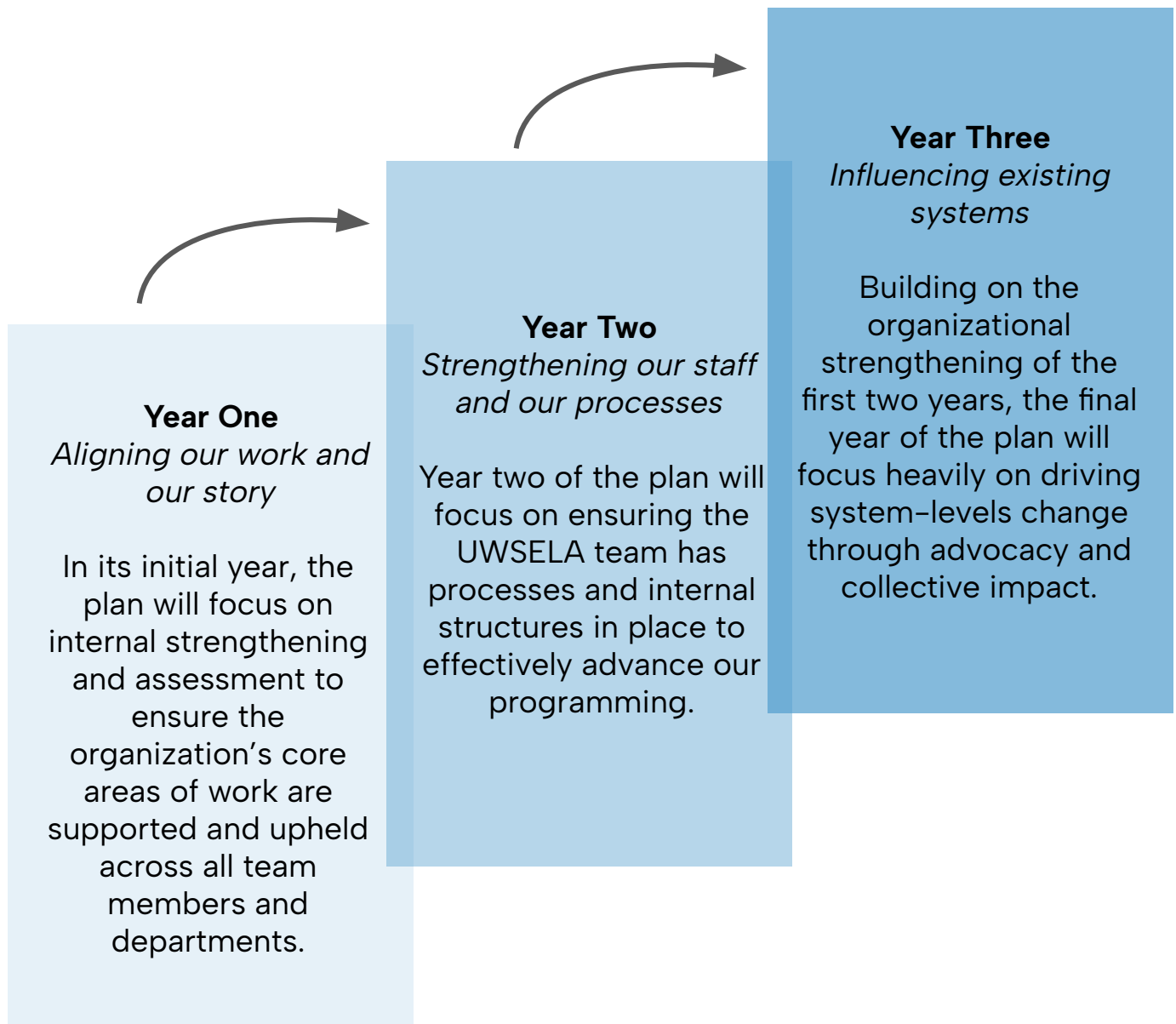
SECONDARY STRATEGIC INITIATIVES

- Collect and share needs and outcomes data more regularly with key partners (including but not limited to: partner organizations, board members, elected officials, community members, etc.)
- Engage actively at local advocacy level
- Leverage other players (such as partner orgs, board members, elected officials, community members. etc.) to move advocacy work forward



STAGES OF GROWTH

Over the next three years, we will phase elements of the strategic plan to ensure implementation is supported and successful.



Pursuing sustainable funding