

United Way of Sarnia-Lambton

The path forward

Business Plan, February, 2021

We have all seen the news report; the social media posts, and many of us have seen first hand the increase needs regarding access to affordable housing, and other poverty reduction strategies.

The United Way of Canada lists Poverty Reduction, Youth programming, and Building Stronger Communities as their national focus. However, with the aging demographic in Sarnia-Lambton, we will need to focus more funding to seniors and in particular seniors in poverty. The Sarnia-Lambton community continues to age for two reasons, the people who are here are getting older, and Sarnia Lambton Economic Partnership has been marketing Sarnia-Lambton as a retirement community and resulting in large numbers of individuals in that age group relocating to Sarnia-Lambton.

It is time that United Way of Sarnia-Lambton re align its funding priorities to better meet the new needs in our community, and at the same time align closer to the United Way of Canada funding priorities.

At least two other United Ways in the Southwest Ontario region are also refocusing their funding to basic life needs.

Two surveys sent out by Community Investment and Finance Director Pamela Bodkin to both service providers and clients, plus reviewing needs and outcomes of the COVID-19 funding in the spring as per board direction, supports the need to refocus funding of more critical services essential for life. Observations of local news media stories and social media posts in the past year indicate that donors want to support local grass roots organizations that provide those kinds of critical programs. United Way of Sarnia-Lambton Donor Option results to non-funded agencies also indicate an appetite to support more locally run organizations including religious institutions.

The effects of the COVID-19 pandemic will not quickly go away.

The United Way of Sarnia-Lambton completed the most challenging and the most inventive campaign in its 64-year history. As a result, in many ways because of the COVID-19 Pandemic and other factors, the United Way was successful in raising as much as \$1,753,000 for its annual campaign. Additionally, \$95,000 Donor Option was raised for direct funding to non-funded agencies, and \$99,000 for its own COVID-19 *Compassion Fund* funding in the spring of 2020. In addition, more than \$500,000 was granted to the United Way to fund emergency COVID-19 related services to vulnerable populations.

It is clear that some of the increased critical community needs are as a result of the COVID-19 Pandemic and are here to stay. As a result, in order for the way United Way of Sarnia-Lambton to fulfill its mandate, it must change its funding priorities and it will be required to fund critical community needs.

Funding Priorities - Seniors:

The United Way of Sarnia-Lambton needs to adjust its current funding priorities to more critical needs in our community, in alignment with the United Way of Canada focus. Given our aging demographics, greater focus on seniors funding is vital.

Currently, 37.4 % of the Sarnia-Lambton population is over the age of 55, compared to 30% of the Ontario population that is over 55 years of age or older. According to the 2016 census, 21,3% of the local population is over 65 compared to only 16.7% in Ontario; 16.9% nation wide. As mentioned above, this is likely to continue.

Another significant benefit with aligning more to the National strategy is this will allow United Way of Sarnia-Lambton to utilize nationally prepared marketing materials, saving local resources, and strong evidence shows this is what donors feel more passionate about and more likely to donate to.

Funding Priorities - Strong Communities/Mental Health:

With Mental Health being so large in scope and having seen increases in funding by provincial and federal governments, we may want to focus our programming on reducing isolation, and suicide, and perhaps to some degree addictions. For example, the CMHA received nearly \$13,000,000 in government funding last year, and yet the United Way of Sarnia-Lambton funds \$60,000; only 0.4% of the agency's total \$14.3M annual revenue. Perhaps that funding can be better used, funding local programs that reduce isolation and promote inclusion with more measurable results with a smaller, more focused, local agency.

Mental Health is such broad spectrum, our United Way should focus more on decreasing isolation, addictions, and suicide prevention on a local scale.

Funding Priorities - Emergency Life Essentials:

We know that there is a growing need for basic life services such as access to affordable and stable housing, as well as emergency shelter, and food securities. These types of programs, poverty supports and other critical services can and need to continue to be measured and community outcomes identified.

In the near term, United Way of Sarnia-Lambton must have money available for needed critical services to remain relevant, and be able to quickly respond to these increasing community needs. As a result, the United Way of Sarnia-Lambton needs to focus on emergency shelter and related supports.

Admittedly, this is a paradigm shift for the United Way of Sarnia-Lambton in terms of funding direction. Thirty years ago, it was policy of the United Way of Sarnia-Lambton, and many across the country to not fund primary services of life; namely, food, clothing, and shelter. But over the years this has gradually changed, and until now has never included shelter in anyway, and funding to food banks like the Salvation Army and Inn of the Good Shepherd has been directed to programs within the agencies and not to emergency food and clothing.

Recommendations, based on community surveys and United Way/Centraide Canada direction:

From Poverty to Possibility: 45% (42% - 47%)

Healthy People, Strong Communities (with a strong emphasis on seniors, inclusion, and addictions supports) 30% (28% - 33%)

All that Kids Can Be: 25% (23% - 27%)

United Way of Sarnia-Lambton must immediately begin meeting with the poverty related agencies since we do not currently fund that service area now and look for opportunities to start funding immediately during these cold winter months that have measurable outcomes. Presently, the United Way of Sarnia-Lambton has \$110,000 available for funding through the current Venture Grant Program to achieve immediate outcomes and impacts, plus up to \$62,000 in available funding from agency refunds due to not running programs.

Soon, we offer a Request for Funding Proposal process on a wider, community wide scope and both the City of Sarnia, and rural Lambton County programs must be considered.

Venture Grants:

The Venture Grant program has enabled the United Way to quickly address changing community needs and respond quickly to help meet those emerging needs. In addition, the Venture Grant program enables all not-for-profit agencies to have access to emergency funding from the United Way; not just those deemed "Member Agencies".

It is recommended that United Way immediately rebrand the Venture Grants to “**Critical Service Grants**”, with similar existing policies, but focused on funding emergency service needs, and to ensure United Way has adequate funding available for emergency needs over the next 11 months.

The policy for this grant stream will have to be adjusted slightly going forward. The maximum grant will be \$20,000; however, in special circumstances, the Board may elect to provide up to \$30,000.

As per existing policy, build up the grants to 5% of the gross campaign every January, beginning January 2022. During years whereby there is a reduction in campaign revenue by 3% or more, the United Way of Sarnia-Lambton Board of Directors may reduce the amount of funding for the *Critical Services Grants*. Unused money will continue to roll into the following year.

New Requirements of funded agencies:

It is clear that the role of United Way Resource Development staff around the continent is now much more about marketing, and less about fundraising. In most other United Ways, fundraising and marketing staff are much larger than in Sarnia-Lambton, thereby decreasing the amount of money available for local community programs and services.

The United Way of Sarnia-Lambton does not have the resources, financial or otherwise to do necessary and appropriate marketing all on our own. Our strategy has always been to keep operating costs as low as possible thereby increasing the amount of money available for agency funding both in real dollars and as a percentage of revenue.

The need for agencies to take a much more proactive approach to marketing and promotion is in addition to the long time concerns of Donors wanting to know where their United Way contributions are being used; to what agencies and what programs.

It is recommended that funded agencies MUST be held accountable to assist in this activity.

In future, all funded agencies must have:

- A local website with full local control, branded with United Way funding information with local input/control etc.
- At least one social media account, all with full local control, branded with United Way funding information/news.
- All funded agencies be mandated to post a minimum of two social media posts per month and use the hash tag: **#UnitedWaySarLam** so United Way can more easily monitor.
- Agencies must provide content to the United Way for media stories/posts/other marketing materials etc. when requested to promote the program and the United Way

of Sarnia-Lambton in the first quarter of the year or their new funding cycle, twice annually at minimum.

- Use of the United Way logo must be used and displayed in areas where UNited Way of Sarnia-Lambton programs are administered.

***Note:** In all cases, the United Way of Sarnia-Lambton will assist any agencies, specifically those who may not have the available resources, financial or otherwise, to assist them in their social media and other digital requirements where requested.

***Note:** As a result of the United Way focus to fund more local grass roots organizations, the United Way of Sarnia-Lambton Board of Directors may provide a waiver to an agency who is unable to meet any of the funding requirements because of budgetary constraints.

Current quarterly reports from agencies will continue to be required but include questions such as:

- Number of Social Media followers
- Number of agency posts to what platforms
- Number of times assigned Hash tags were used
- Have active links to the United Way website, and/or United Way social media accounts

Note: A report will be presented on a quarterly basis to the United Way of Sarnia-Lambton Board of Directors based on this information, including outcome measures and impacts. The impacts and outcomes reported may be released on United Way of Sarnia-Lambton social media assets and to local news media as part of its marketing plan.

It is recommended that all funding will be one-year commitments, beginning April 1 of each year:

Fifteen years ago, the United Way went to three year funding to reduce administration for both the United Way and the funded agencies and to allow the agencies to do some long range planning. While this was achieved, agencies became complacent and restricted the United Way to proactively respond to new realities in our community. This new approach will address those issues and achieve the same objectives.

All funding will be one-year commitments, beginning April 1 of each year, but agencies will have the ability to apply for annual contract extensions. At which time, United Way consider their compliance to all aspects of their funding contract including marketing as stated above, other

outcome and impact measures and service commitments, as well as relevance to current critical needs in Sarnia-Lambton.

Agencies will submit their intent to United Way by December 1 of each year. The agencies will inform the United Way of its desire to:

- () Request contract extension for another 12 months without changes; OR,
- () Request to extend for another 12 months with minor changes; OR,
- () Intent to end the contract on March 31.

Any agency not responding by December 1 of each year after one reminder email on November 1, shall be deemed to have their contract expire after March 31.

Staff and CIC will file a report to the Board of Directors at the January Board Meeting each year with recommendations based on agency intention, community needs, and agency's compliance with all aspects of the contract terms and conditions. Those agencies wishing minor changes may meet with the United Way staff to discuss those changes, but agencies wishing more substantial changes shall meet with the CIC Committee as a whole.

For marketing purposes United Way of Sarnia-Lambton will market (and count) each agency/program that is funded; understanding that this can fluctuate during the year as **Critical Service Grants**, may come and go during the year.

Any agency wishing to change the terms of their funding contract/service details are required to do so in writing.

Next steps:

- Approve the 2021 2022 Funding Priorities. **Completed**
- Approve the new funding policies. (As mentioned above, exemptions may be granted by the Board of Directors because of individual budgetary constraints.). **Completed**
- Update the 2021 campaign strategy by the end of February. **Completed**
- Update the policy and procedure manual where needed by the March 31, 2021 Annual General Meeting. **Completed**
- Meet with poverty **support** agencies in Sarnia and rural Lambton to begin the planning/funding process since we are not currently funding this service area. Funding

may begin immediately through Critical Services Grants to service that population as soon as possible. **Completed**

- Promote RFP for the community beginning May with a focus on funding April 1, 2022, unless necessary. **Completed**

*** See below more details on United Way of Canada funding strategies:

United Way of Sarnia-Lambton Funding Matrix			
	Poverty to Possibility	Strong Communities	All Kids Can Be
	42% - 47%	28% - 33%	23% - 27%
	(Largely Families & Individuals)	(Largely Seniors)	(Youth)
Emergency Life			
Essential Services			
Mental well being and Isolation/Depression/ Addictions			
Seniors specific			

THE CHALLENGE

People who lack necessities like food and shelter can't get ahead in life. Those who struggle to find work or manage their finances aren't able to reach their full potential.



35,000

Canadians are homeless on any given night

1 in 6

children live in households that struggle to put food on the table

11%

of working-age Indigenous people are unemployed

OUR WORK

We invest in three key areas to help people move out of, or avoid, the cycle of poverty.



HOUSING STABILITY

United Way is helping every Canadian access an affordable, safe and permanent place to live - from Housing First programs and emergency shelters, to advocating for affordable housing.



FOOD SECURITY

United Way is working to provide everyone with access to enough nutritious, affordable and appropriate food - through community gardens, school breakfast programs and food banks.

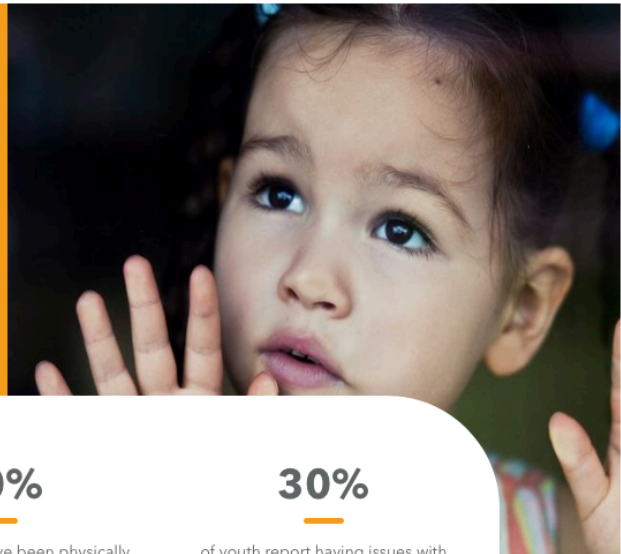


EMPLOYMENT AND FINANCIAL STABILITY

United Way is helping Canadians find meaningful jobs, manage expenses and support their families - from job skills training and continuing education opportunities, to financial literacy programs.

THE CHALLENGE

Early development - from childhood to young adulthood - is a strong predictor of future success. Unfortunately, too many kids face barriers to achieving their dreams.



1 in 4

children are not school-ready when they enter grade 1

30%

of adolescents have been physically bullied

30%

of youth report having issues with mental health or substance abuse

OUR WORK

We help kids move toward the brightest possible future by investing in three key areas.



ENGAGEMENT IN LEARNING

United Way is helping kids succeed in school and develop key life skills - from after-school homework and tutoring programs, to resources that help parents prepare their children for kindergarten.



CONNECTEDNESS AND COMMUNITY INVOLVEMENT

United Way is helping kids develop positive relationships with their peers and families, and be leaders in their community - from team-building recreation programs, to mentoring and leadership development opportunities.



EMOTIONAL AND PHYSICAL WELLBEING

United Way is investing in a positive lifestyle for kids, helping them believe in themselves and make healthy choices - from counselling programs that build self-esteem, to summer camps promoting physical activity.

THE CHALLENGE

The strength of a community is in the wellbeing of the people who live there. Everyone - no matter who they are or where they live - needs the chance to reach their full potential.



1 in 5

Canadian residents were born out of the country

3 million

Adults have a physical or mental disability

2.1 billion

Volunteer hours are contributed by Canadians to their community each year

OUR WORK

We invest in three key areas that help create vibrant neighbourhoods and communities.



CONNECTION TO SUPPORTS

United Way is helping Canadians access and navigate the resources they need most in their community - from supporting the expansion of 211 to removing barriers to accessing local services.



NEIGHBOURHOOD AND COMMUNITY ENGAGEMENT

United Way is encouraging Canadians to get involved in their community, and helping everyone feel like they belong in the place they call home - from promoting volunteerism, to engaging community members in decision-making.



PERSONAL WELLBEING AND SAFETY

United Way is helping Canadians handle life's challenges and make healthy choices - from counselling for people dealing with addiction or mental health issues, to building independent living skills for seniors.

