

# COMMUNITY INVESTMENT STRATEGY

## Frequently Asked Questions

### WHAT IS DIFFERENT ABOUT THE NEW COMMUNITY INVESTMENT STRATEGY?

The new Community Investment (CI) strategy will maximize undesignated funds collected during the annual fundraising campaign to support programs that focus on:

- Long-term plans designed to address “upstream,” root causes of social issues.
- Short-term strategies that provide “safety net” services to families in crisis.
- New, innovative approaches to address community needs and emerging challenges.

### WHAT TRIGGERED THE CHANGE?

United Way of the Ozarks funds programs, not nonprofits. For years, we had been funding the same set of programs. We saw the need to modernize our approach in order to consider additional, well-deserving programs.

The change to the process allows the CI Committee to fund programs that were not considered in the past. All future applicants will begin on a level playing field.

This new strategy will take a more systemic approach. There will be a greater emphasis on directing resources “upstream” toward root causes of social issues, including knocking down the barriers to education, workforce training and jobs.

The real impact will occur when we all do our part. Our collective investment will “move the needle” on key community issues and improve the opportunity for individuals and families to become self-sufficient.

### WILL I STILL BE ABLE TO DONATE TO MY FAVORITE NONPROFIT?

Yes. United Way of the Ozarks enjoys a collaborative relationship with our region’s community nonprofits. Any donation designated to a nonprofit is allocated to that organization.

### WILL I BE ABLE TO SUPPORT THE FUND I AM PASSIONATE ABOUT?

Yes. Each donation to the United Way may be designated to one or more of the funding categories.

Prior to the allocation process, CI Committee members gain in-depth knowledge about our community’s needs. Their commitment to making our community better will ensure your gift makes the greatest impact.

### WHAT RESEARCH WENT INTO THE NEW COMMUNITY INVESTMENT STRATEGY?

United Way of the Ozarks reached out to members of the community through a series of focus groups. We spoke with businesspeople, retirees, civic leaders and educators. And we connected with nonprofit leaders.

We also researched United Way agencies across the U.S. We explored how they evaluate programs and invest donor funds. We examined the best practices that result in communities gaining the most value from every dollar.

Our CI Committee believes in our new process and so does our Board. We have received very supportive feedback from various stakeholder groups and are excited to see the impact it will have on our community’s future.





United Way of the Ozarks

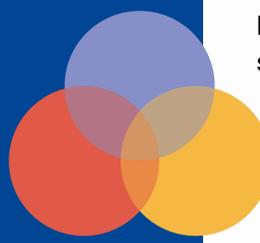


# COMMUNITY INVESTMENT FUNDING MIX

Our Community Investment (CI) Committee works to make donor dollars go further. Members of the CI Committee are donor volunteers. They are committed to a strategic approach in allocating funds that serve both the needs of today and the goal for a brighter future.

The new CI funding mix focuses on the health, education and financial stability needs of our community. It will maximize undesignated funds collected during the annual fundraising campaign through:

- 60% Upstream Funding
- 30% Safety Net Funding
- 10% Innovation Funding



## 60% INVESTMENT IN UPSTREAM FUNDING

We are sharpening our focus on the **upstream**, root causes of social issues in our community. These systemic efforts will reduce or eliminate barriers to education, workforce training and jobs. Our upstream focus will fund solutions that help individuals and families become self-sufficient.

Barriers to self-sufficiency may include the lack of:

- Reliable transportation.
- Affordable childcare.
- Safe and stable housing.
- Financial literacy.
- Workforce training.
- Educational support.
- Access to health (including mental health) and wellness support.



## 30% INVESTMENT IN SAFETY NET FUNDING



United Way of the Ozarks will continue to help lift individuals and families from crisis. **Safety net** services and resources provide life-sustaining connections and address priority needs such as:

- Hunger and food insecurity.
- Affordable housing and emergency sheltering.
- Child abuse and neglect.
- Response to a natural disaster.

## 10% INVESTMENT IN INNOVATION FUNDING

We are committed to making our community better and cultivating the kind of change that matters. We know there are others who share our vision of how it should be, rather than simply how it is.



The **innovation** fund is an open invitation for nonprofits that are ready to pair their desire to create change with an entrepreneurial and competitive spirit. Guided by the efactory – a Missouri State University program – nonprofits can explore generating the best conditions for our community to thrive.

New creative, scalable solutions targeting upstream causes of social issues or safety net crisis symptoms will be incentivized to address a:

- New or emerging need in our community.
- New method to address an existing need in our community.