



Community Investment Overview 2015

CHANGING. EVOLVING. TRANSFORMING.

For over 50 years United Way Oxford has been working with our community to change lives. Over the past few years, our Board of Directors recognized the need to evolve and have been committed to becoming more deliberate; therefore allowing investments in opportunities that have the greatest potential to meet the needs of our communities.

Throughout the past 18 months we have been having community conversations with people from across Oxford County with “lived” experience. These people have shared their aspirations, hopes, the challenges they face and the barriers which prevent them from getting the supports they need to reach their full potential. In these conversations, we talked about the genuine need for change. This change is required if we desire to support the social fabric of our community and ultimately, create opportunities for everyone. These conversations became our Community Narratives, the foundation which United Way Oxford’s work will be based moving forward.

In summary, our community has told us what they need, local experts have shared their knowledge, and volunteers have guided the process. This combined wealth of expertise provides us with a deeper understanding of not only what matters here in Oxford County, but where there is “readiness” to see change.

United Way Oxford’s new investment strategies align to our priority areas and will allow us to focus our investments to be more targeted. Our goal is to invest in very specific opportunities that will allow us to measure collective impact and show success in ways that have not previously been possible. This model of supporting organizations to create a stronger community will promote collaboration, flexibility and the opportunity to work towards achieving long-term goals.

Flexibility in funding is necessary to address the complex social issues that we see in our community. Leveraging key partnerships, building new relationships and encouraging collaborations is where opportunity and greater support for our community exists.

Beginning in April 2016, our new funding model begins. This 2-part process starts in November 2015 with a “Statement of Interest”. This initial application will be reviewed by a volunteer committee to ensure the applications with the strongest alignment to our communities needs and those in the best position for success can move forward. These identified applicants will then be invited to submit a full- application for further consideration. Organizations that are not invited to submit part 2 of this process will be eligible to apply in the future.

The information attached to this document is intended to be of assistance as you consider applying for funding. It is intended to give you an overview of United Way Oxford and our new investment strategies. It provides information gathered from our community and how this has guided our work. Please be sure to refer to **United Way Oxford’s Investment Framework Summary** and **Investing for Change** as you complete your “Statement of Interest” application.

We encourage you to visit www.unitedwayoxford.ca for more information, or contact Kelly Gilson, Executive Director at info@unitedwayoxford.ca or 519-539-3851.

OUR MISSION

To improve lives and build community by engaging individuals and mobilizing collective action.

OUR VISION

That all Oxford residents:

- Enjoy living in healthy, prosperous, safe communities and have a sense of belonging;
- Have access to programs and services that support their needs with dignity;
- Develop and maintain resilience;
- Embrace opportunities for their future.

OUR ASPIRATIONS

We aspire to:

- Energize and inspire people to make a difference;
- Provide meaningful opportunities for individuals to realize their potential by demonstrating volunteer leadership in service to community;
- Reflect the diversity of the communities we serve;
- Develop human care agendas within and across our communities;
- Build coalitions around social agendas;
- Increase investments in agendas by expanding and diversifying our own resource development and fundraising efforts and supporting those of others;
- Ensure investments have recognizable impact.

OUR CODE of ETHICS

United Way Oxford Staff, Volunteers and Board Members recognize that they are in a position of trust with stakeholders and shall act at all times to preserve that trust by committing to make sound, ethical decisions that comply with moral and legal requirements.

We commit to:

- **Accountability:** Transparency in monitoring, evaluating and reporting our performance; Good stewardship of our resources; Compliance with our policies and legal requirements;
- **Personal Conduct:** open and honest communication; respect, fairness and sensitivity; creating a positive work environment; striving for excellence in all that we do; and avoiding coercive tactics in dealing with donors or vendors.
- **Conflict of Interest:** taking due measure to ensure there is not, and shall not appear to be, any conflict of interest between the personal and private interests of staff and volunteers.
- **Diversity and Equality:** reflecting the community we serve; providing equal opportunities regardless of race, national or ethnic origin, colour, religion, sex, sexual orientation, age or mental or physical disability;
- **Political Activity:** We do not engage, directly or indirectly, in partisan political activity. Our volunteers identify that they are acting independently and not as a representative of United Way if they are engaged in political activity.
- **Privacy and Confidentiality:** safeguard privacy rights; comply with federal and provincial laws and organizational policies.

OUR ORGANIZATIONAL STRATEGIES

- To build organizational excellence;
- To engage community and mobilize action for impact;
- To strengthen the non-profit sector;
- To identify root causes, address priorities and invest resources for greatest impact;
- To be a strong communicator; to educate the community on social needs and influence public attitudes, systems and policy on human care issues;
- To strive to have the resources required to create change.

OUR WORK

- Engaging and mobilizing community (dollars, influence, time & knowledge);
- Strengthening the network of services and the capacity of non-profits and community;
- Influencing public attitudes, systems and policy to develop human care agendas;
- Understanding and addressing underlying causes.

By combining community engagement with priority-setting and collective action, we are working to achieve lasting, measurable change in our community.

OUR FOCUS AREAS

We believe that the best opportunity to make lasting change is to focus our efforts and resources in three areas:

- Moving people from poverty to possibility;
- Building strong communities;
- Helping kids be all that they can be.

OUR COMMUNITY IMPACT INVESTMENT GUIDING PRINCIPLES

Know our Community: United Way turns outward to the community to gain an understanding of what the community cares about so it can act with authority, authenticity and accountability

Community impact: United Way's priorities and strategies are rooted in the aspirations of the community; and our resources are invested in those priorities in order to make a positive and measurable difference.

Leverage: we will leverage and invest resources in order to accelerate our work so that we will produce greater impact and relevance to our community.

Collaboration: United Way invests its resources to support collaborative and partnership efforts that will accelerate its impact.

Strength based community building: United Way invests its resources to strengthen and leverage the knowledge, abilities, culture and assets of our community

Flexibility and innovation: United Way invests with flexibility and diversity in order to be responsive to innovative and promising approaches that address its priorities

Stewardship: United Way is accountable to our donors to ensure prudent, effective and efficient distribution and use of United Way resources in accordance with these principles. The role and responsibility of United Way and funded groups will be governed by agreements that reflect this stewardship role and these principles.

OUR COMMUNITY NARRATIVES

- People want a voice, but they are concerned that community leaders, people in authority and decision makers do not genuinely understand the ramifications of the decisions they make and the effects they have on real lives. As people talk more about those concerns, they talk about the perception that decisions are often made before people are asked about what matters to them. They say they feel unable to influence the change they want to see in the community. They say we need to focus on having authentic community conversations before making decisions. They also say people need to be empowered and supported to advocate for what matters to them.
- People want to feel that they belong in their community, but they are concerned that there are many barriers to belonging, and that their community is not open to addressing these barriers. As people talk more about those concerns, some talked about feeling stereotyped, disrespected and not valued as an equal member of the community. Some also spoke of barriers to participation such as transportation, limited income and lack of knowledge about existing opportunities. They say that we need to focus on better understanding what belonging means, reducing stereotypes and increasing support networks to creatively address a variety of emotional and physical safety needs. They also say that we need to focus on strengthening both formal and informal community gathering places and promoting volunteerism.
- People of all ages want Oxford County to be a great place for kids to grow up. But they are concerned that the healthy development of all children and youth is not a community priority. As people talk more about this concern, parents spoke of wanting knowledge of and access to, increased opportunities for social, recreation, culture and education. Youth spoke of wanting to feel safe, valued and included. They also talked about the need for opportunities to match their personal interests, education and career goals. They say that we need to focus on making the healthy development of all children and youth a strategic community priority.
- People want convenient, safe, affordable transportation options that allow them to meet their basic needs and participate in other essential daily activities. But they are concerned that daily life is further complicated for those who have no transportation or who have limited financial means. As people talk more about this concern, those who need to rely on walking spoke about unsafe or no sidewalks, dim lit street lighting and lack of snow/ice removal. Others feel they place a huge burden on family, friends and volunteer drivers; and that coordinating schedules can often be difficult. Those who access public transportation, say they encounter problems getting to work in a timely manner, getting places on evenings and weekends and being able to schedule appointments based on the transit schedule. When people spoke generally about transportation, they said they faced barriers whether travelling within their cities and towns, between communities or beyond Oxford County. They say we need to focus on a variety of affordable and creative transportation options.
- People want a community where everyone's basic needs are met, but they are concerned that many people do not have enough money to meet those basic needs. As people talk more about living in poverty they talk about the lack of affordable housing, recreation, transportation, food, employment and education opportunities and having to make choices about how to spend their limited dollars. They say that because of their limited incomes they feel like they have no control over the choices they have to make for themselves and their families. They are concerned about the stigma and indignity that you feel when you are poor. They say we need to focus on services that truly meet their needs and that the community, especially those in authority positions, need to understand the issues and barriers from their perspective.

- People want a community which supports and accepts those with mental illness but they are concerned that there is a stigma associated with mental illness. They are also concerned that there not enough resources in the community for those needing support. As people talked more about their concerns, they say that those with mental illness are treated 'less than others' and there is a lack of acceptance and understanding from the community. They say that they want better supports around medication and treatment. They say we need to focus on creating an educated community in order to remove the stigma of mental illness. They also say we need to begin investing in personalized, co-ordinated, impactful and timely treatments and supports.
- People want a community that values education. They want to ensure that there are many educational opportunities available to meet the needs of all residents. They are concerned that not all children graduate high school, that many of those that do graduate leave the area to access post-secondary education and never return, and that others do not have the financial resources or supports required to access additional educational opportunities. As people talked more about those concerns they said we need to better understand the factors necessary for school success and develop broad-based community supports to achieve that success for all. They talked about the high cost of education, the stress created to maintain high marks for admission, and that social issues are often directly linked to academic issues. They say we also need to focus on attracting university and college courses to Oxford to provide local access, and that those courses need to be relevant to Oxford's fields of employment, better ensuring economic stability for future full time positions.
- People want a community rich with meaningful employment prospects for those who are willing and interested in working. But they are concerned that there are significant barriers and gaps that prevent them from being qualified or able to maintain steady employment and there is often great shame in being unemployed. As they talked more about these concerns, they talked about wanting to work full time but there is frequently a disconnect between those looking for employment and the skills and qualifications required by employers. They also spoke about the lack of stable, permanent and well paying positions. They say we need to focus on increasing education and employment opportunities locally and ensure that the programs and supports offered lead to employment. They also spoke about needing help to remove employment barriers by providing services such as accessible, affordable day care, transportation, placement opportunities and greater supports to help establish employment success.
- People want a safe and drug free community, but they are concerned that people turn to drugs and that they are too easily available. As people talk more they talk about the prevalence of both street and prescription drugs; lack of appropriate and timely services and supports; and lack of knowledge about available supports. They also said that their perception of lack of police watchfulness made them feel less safe in their community. They say we need to focus on understanding the root causes of drug and alcohol abuse, respond with appropriate early interventions, increase police presence and engage the entire community on discussions geared towards prevention.

OUR FUNDING CRITERIA

Criteria	Indicators
<p>COMMUNITY NEED At the heart of United Way's impact investment strategies is the importance of authentically engaging the community; especially those for whom the service is targeted. United Way engages in community</p>	<ul style="list-style-type: none"> • The application aligns with one of more of United Way's strategic investment areas and provides rationale for how the program links to identified goals.

<p>consultations and our investment strategies are developed by local volunteers using both Public & Expert Knowledge. United Way is turned outward, and we expect those organizations that we support to also be. Organizations looking for support need to have their program(s) aligned with United Way's identified strategies and be able to articulate how it meets the aspirations of their community, how that knowledge was acquired, that it is evidence-based and how on-going feedback is gathered from their target populations and used to modify their work.</p>	<ul style="list-style-type: none"> • The application is strength-based building on existing capacity, assets and infrastructure within the community. • The application does not duplicate services that are already offered or provides evidence to show that it is efficient, more effective or serves an identified part of the community that does not have access to the existing service. • The application supports working with other organizations to build capacity for both organizational and community change, thereby building Public Capital. • The application aligns with United Way's mission, vision, values and ethics.
<p>PROGRAM OUTCOMES & INDICATORS A work plan identifying outcomes, targets and actions will be included in the Funding Agreement and progress will be reviewed at the end of the year or, in the case of multi-year funding, on an annual basis.</p>	<ul style="list-style-type: none"> • Activities outlined in the work plan advance the overall goals of the program. • The identified targets and goals are realistic and achievable within the grant period. • Program action plan has clearly identified deliverables, outcomes, targets, etc. and reviewed on an annual basis. • The agency has measurement tools specific to the program indicators. • The program contains actions/ideas/strategies that are rooted in sound research. • The program shows consideration to areas identified as important to our community such as including overall agency and program emphasis on creating/enhancing a sense of belonging, giving participants a voice and meaningful input, consideration to accessing services, and inclusion of community awareness/education opportunities. <p>If a collaborative application:</p> <ul style="list-style-type: none"> • The application demonstrates collaborative activities in which multiple organizations work to achieve community outcomes through shared resources. • There are mechanisms in place to ensure active participation by all

	<p>members of the collaborative and that a signed agreement clarifying collaborative details such as roles and responsibilities, reporting expectations, decision making, etc. is in place.</p>
ORGANIZATIONAL CAPACITY	<ul style="list-style-type: none"> • The application aligns with the agency’s mission. • The agency demonstrated a need for United Way funding. • The agency has effective management and board governance practices. • The agency has demonstrated its capacity by successfully delivering same/similar or complementary services previously. • The agency utilizes resources efficiently, including staff, volunteers, physical assets and financial resources. • The agency has staff and volunteers with the required skills and experience to achieve the stated outcomes. • The agency’s core costs are appropriate in relation to program activities. • The financial resources required to implement the program are reasonable, • The revenues and expenses outlined in the budget are appropriate and reasonable.

OUR GLOSSARY OF TERMS

Accountability*	A leader sets realistic for change and makes progress. They pursue actions that really mean something to people. They account for what they are learning.
Aspiration*	We start with people’s shared Aspirations, rooted in reality, rather than “problems” or “visions.”
Authenticity*	Words and actions of a public leader reflects the reality of people’s lives in the community. They genuinely listen to the community in an ongoing way. The community genuinely believes that you have their best interests at heart.

Authority*	A public leader has knowledge rooted in the community – an understanding of people, their lives, where they live, their aspirations and concerns. They use this knowledge to inform their decisions. They act as part of the community as opposed to acting apart from it.
Community Impact Council	A group of local Oxford County professionals with expertise in 1 or more of our Focus Areas that volunteered, over 10 months, to help review current social services, research data and promising practices, and to identify gaps that the United Way could have significant impact with targeted investments.
Expert Knowledge*	Comes from professional analysis and reporting of statistics, trend data, poll data, market and audience studies. Often in language that only professionals understand.
Focus Area	Specific area of our shared United Way vision both locally and nationally. The 3 Focus Areas help us articulate our vision to move people From Poverty to Possibility; to ensure that children & youth grow up to be All That Kids Can Be; and to build Strong Communities.
Funded Partner	An organization that United Way agrees to fund a specific program with for a specified period of time.
Funded Program	The specific program that United Way has agreed to fund for a specified period of time.
Funding Agreement	A contract outlining the responsibilities, expectations and obligations for both the United Way as well as the recipient organization. It will detail payment obligations, reporting commitments, acknowledgement expectations, etc.
Intentionality*	A mindset and ongoing practice of making decisions grounded in 3 foundational concepts: Turning Outward, Aspirations, and the 3 A's of Public Life: Authority, Accountability & Authenticity. Being intentional about choices to ensure greater impact.
Investment Strategy	The Investment Strategies were developed by the Community Impact Council to guide our investments. They will continue to be developed and enhanced and will be adapted as required.
Public Capital*	The conditions for change that enable communities to move forward. These are the factors that shape the ability and capacity of a community to work together and create change.

Public Knowledge*	Comes from engaging with people around their aspirations, their concerns, how they see their community. In plain language that everyone can understand.
Sweet Spot of Public Life*	The Sweet Spot is where you take action on issues the community cares about in a way that builds the conditions for change in your community at the same time. The Sweet Spot between the main concerns and specific issues and the Public Capital (community conditions).
Turned Outward*	Turning Outward is fundamentally an orientation; a mindset. When we are Turned Outward, we can discover our shared aspirations and make progress together. Make the community the main point of reference for your work.

*Terminology and Definitions courtesy of the Harwood Institute of Public Innovation