



STRATEGIC PLAN

There are moments when an organization has to decide what it's truly for.

Not what it does – most organizations can tell you what they do. But what they're for. What they're willing to focus on, be held accountable to, and say no to, so they can say yes to something that matters more.

In 2026, as we marked 90 years of service to Cherokee, Spartanburg, and Union counties, we arrived at one of those moments. And we answered it with more clarity than we've had before.

The strategic plan in your hands is the result of that work. It was built through an honest, inclusive process that asked hard questions about where United Way of the Piedmont can make the most meaningful difference, and what it will take to get there.

The answer centers on financial security. Not because other challenges don't matter, but because financial security is foundational. When a household is financially secure, everything else becomes more possible: better health outcomes, stronger families, children better positioned to succeed. It is the ground floor. And in our region, too many households are still working without it.

This plan commits us to leading that work with focus and discipline. It asks us to show up fully across all three counties with relationships and leadership rooted there. And it calls us to be honest about our role: sometimes leading, sometimes building capacity in others, sometimes stepping back so the right organization can step forward.

Ninety years and counting of trust made this level of clarity possible. Your investment, your partnership, and your belief in what this community can become made it possible.

We don't take that lightly, and we intend to honor it.

With gratitude,



Paige Stephenson
President & CEO
United Way of the Piedmont



WHO WE ARE

For over 90 years, United Way of the Piedmont has provided leadership, investment, and impact across our region. We have united local nonprofits, businesses, and community members to tackle the biggest challenges facing our community.

Our strategic plan was created with two important truths in mind. First, the biggest issues facing our community can't be solved alone. Second, it is necessary for us to make more intentional and targeted investments of both talent and resources in areas that will make the biggest impact. These are ideas that are consistently woven throughout this plan. Our belief is that this level of commitment pushes us beyond quick fixes and reinforces our responsibility to create real, long-term change in our community.

OUR VISION

A united community where everyone thrives.

OUR MISSION

Mobilizing people, partners, and resources to create pathways to stability and opportunity across our three-county service area.

OUR VALUES



Excellence: We leverage resources and serve efficiently and effectively.



Inclusion: We connect, convene, and collaborate.



Innovation: We are proactive, bold, and responsive to issues and challenges.



Integrity: We maintain trust and respect through transparency and accountability.



Leadership: We inspire and empower transformative change.

HOW WE ENGAGE

Historically, United Way of the Piedmont and other United Ways across the country have been primarily known as fundraisers and funders of programs. While this role will always be a pillar of our work, a truly united community requires all of us to be more strategic and intentional about how, when, and where we show up and engage. Throughout this plan, you will see us taking on a range of roles—intentionally flexing our positioning based on the need, the opportunity, the partners involved, and where we can make the most meaningful contribution and impact.

- **As a LEADER**, we take primary responsibility for direction, strategy, and outcomes on key issues, leveraging our expertise to guide collaborative action. This requires us to be visibly “out front” and constantly present.
- **As a CONVENER** and capacity builder, we bring the right people and organizations together to address issues and incubate ideas. This includes lifting the capacity and skills of others along the way, recognizing there are many capable organizations and individuals in our community that could and should assume leadership roles.
- **As an IMPLEMENTER**, we directly operate programs or initiatives when we are uniquely positioned to do so.
- And yes, **as a FUNDER**, we leverage corporate and individual giving to provide investments—financial and in-kind—that move work and ideas forward across Cherokee, Spartanburg, and Union counties.

THE PLAN IN ACTION

As we look to the future, we must continue engaging and mobilizing investors, advocates, partners, and volunteers while also refocusing our internal capacity on what matters most. All of the content in this plan, from our updated mission and vision to our new strategic priorities, were developed through an extensive, inclusive process and will set the course for UWP’s future.

While the content of this plan is intended to provide clarity and direction, it should not be seen as a checklist, nor a document so scripted that we lose our ability to remain nimble and flexible. The environment we operate in is ever-changing and increasingly unpredictable, and our approach must be responsive to that reality. **There were also three very important themes identified through this process that cut across the entire strategic plan.** Three essential elements are all subtly and explicitly woven throughout the plan and are things we will pay close attention to as we move forward and continue finding ways to increase our impact.

Decision Discipline

Maintaining focus and being comfortable saying “no” to opportunities that don’t align with our vision, mission, and values.

Communications

Strengthening internal and external communication so that our team, partners, and community understand our direction, work, and impact.

Funding & Revenue

Rethinking our revenue model and continuing to deploy resources efficiently and effectively.

STRATEGIC PRIORITY 1

FINANCIAL SECURITY FOR EVERY HOUSEHOLD

We will lead and implement collaborative efforts that help individuals and families create a stronger financial future.

What It Means

UWP will focus its investments, grant making, and direct service efforts here—leading and funding initiatives and partnerships that help individuals and families build financial resilience and move along their economic mobility pathways. As a result, we will position ourselves as a regional leader and expert in financial stability and economic mobility.

Why It Matters

Financial security and opportunity are foundational elements of our vision of a united community where everyone can thrive. When households are financially secure, they are healthier, more stable, and better able to succeed.

What We Will Do (Strategies)

- Make data-driven decisions that **align investments, programs, and partnerships** around evidence-based strategies that lead to population-level outcomes and improvements.
- **Identify and strengthen strategic partnerships** that can drive systems change and expand opportunities for individuals and families.
- Deploy interventions and **measure progress at both the population and individual level**, with clear indicators tied to ALICE data and other meaningful community metrics.



STRATEGIC PRIORITY 2

PRESENCE WITH PURPOSE

We will consistently and intentionally engage across our three-county footprint to ensure our presence and impact reach the unique communities we serve.

What It Means

Presence with Purpose is about being strategically present—in the right places, for the right reasons. We will invest in increasing our physical presence, ensuring our community impact structure reflects leadership in each county, and tailoring our approaches to local needs.

Why It Matters

If our vision is for everyone to thrive, we must be intentionally present in each of our communities. Presence with Purpose ensures that our impact and investments are felt beyond Spartanburg, creating more efficient, localized impact and stronger partnerships rooted in mutual trust and shared goals.

What We Will Do (Strategies)

- Deepen relationships, build credibility, and **become a meaningful partner** by showing up and being visible in community.
- Clarify expectations and commit to our optimal role in each county so that **partners view UWP as their partner of choice**, allowing us to use our unique skills and strengths to add value and fill gaps rather than duplicate efforts.
- Balance our presence so that we **show up equitably and reliably** across Cherokee, Spartanburg, and Union counties, recognizing our engagement will look different in each.



STRATEGIC PRIORITY 3

POWERING COLLECTIVE STRENGTH

We will amplify our role as a convener and capacity builder—connecting, equipping, and supporting the people and partners driving change in our community.

What It Means

Powering Collective Strength means being the force multiplier behind our community's progress. We will focus on building the capacity of our partners, aligning systems, and reducing duplication—ensuring that a stronger, more connected nonprofit sector emerges, able to meet our communities' challenges with efficiency and unity.

Why It Matters

Collective strength is the only way to scale impact. When we strengthen our partners, both individually and collectively, we strengthen our community. A focus on collective strength will help build alignment, reduce fragmentation, and ensure that efforts across the region add up to real change. This is the path from isolated impact to collective progress.

What We Will Do (Strategies)

- Prioritize our efforts to **build capacity, improve systems, and leverage data**, all of which will help to strengthen the nonprofit sector as well as identify duplication, gaps, and opportunities for partnership across our service area.
- **Expand access to training, resources, and shared tools** (e.g., Charity Tracker and 211) so that they become widely adopted and used to power collective action.
- **Model intentional collaboration:** stepping back when others are best suited to lead, building capacity when it is absent, and stepping forward when our expertise is needed.



