



Strategic Plan

July 1, 2007 – June 30, 2010

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Strategic Planning Committee

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Introduction

Under the expert leadership of Keith Gee, a 12-member Strategic Planning Committee was recruited with membership from the United Way Board of Directors, member agency executive directors, and United Way staff members. The Committee participated in four meetings with a Board Retreat conducted between the second and third meeting.

At the first meeting in the fall of 2006, the Committee was presented with detailed information about the programs and services of the United Way, survey results, and York County demographics. In addition, the Standards of Excellence Task Force Report was shared with the Committee. This report was the result of an assessment of the United Way of York County and how it compares to a “best practices” organization, as defined by the United Way system. Committee members also reviewed the mission statement and conducted a SWOT (Strengths, Weaknesses, Opportunities and Threats) analysis.

The next meeting consisted primarily of discussion of the SWOT analysis and the imperatives that emerged. Imperatives are the key issues that the United Way must address over the next three years. They provide the foundation for goals and objectives.

In preparation for the third meeting, committee members reviewed a survey instrument to assist in the development of the value proposition. It was agreed that each committee member would interview at least three contributors in order to determine why people should give their time, money and talent to the United Way versus other alternatives in the community.

In January, the Board of Directors conducted a strategic planning retreat. During the retreat, they reviewed the mission statement, value statements, and the imperatives as recommended by the Strategic Planning Committee. In addition, they discussed what should be contained in the value proposition and the need for a vision statement. Their input was provided to the Strategic Planning Committee.

During the next meeting, the Strategic Planning Committee approved some changes to the mission statement, which was subsequently approved by the Board of Directors. In addition, the Committee reviewed input from the Board and the survey results to begin crafting a values proposition. The values proposition was given to staff to develop for further review.

The final meeting of the Strategic Planning Committee consisted of review of the value statements, approval of the value proposition and a determination of the final list of imperatives. The imperatives were given to staff to develop into goals and objectives for ultimate approval of the Board of Directors.

Mission Statement

To improve people's lives by building a strong community through cultivating financial generosity, volunteerism and civic engagement.

Value Statements

Integrity

Our relationships with each other and the greater community are based on honesty and respect, as we conduct ourselves with the highest ethical standards. Our work is guided by our organization's stated mission and values.

Accountability

We are prudent stewards of United Way of York County's resources, responsible to our donors, member organizations and community. Our financial and outcome reporting meet or exceed operational and governance standards and enhance transparency to the donors and communities we serve.

Operational Excellence

Our high standards of performance and commitment to continuous improvement enable us to provide effective, efficient, and quality services.

Inclusiveness

We value difference and strive for inclusion. We act in ways that respect the dignity, uniqueness and intrinsic worth of every person.

Collaboration

Within United Way of York County, we work as a team for the good of the organization and the community. We partner with other organizations and individuals to leverage our talents and resources for greater community impact.

Making a Difference

We mobilize the community to improve people's lives. We make a positive and lasting impact in our community.

Value Proposition

The United Way conducts an efficient annual campaign at the workplace that provides a vehicle for individuals to respond to community needs as well as financial needs of nonprofit organizations.

- Low administrative/fundraising costs;
- Workplace campaign – opportunity to provide information to the workforce on community needs;
- Community Fund – one contribution supports over 75 programs of 38 member agencies;
- Open Donor Choice – ability for contributor to designate all or portion of contribution to nonprofit organization of his/her choice.

The United Way is positioned in the community to provide a leadership role on community issues and/or serve in a more supportive/partnership role.

- United Way has taken a leadership role around issues involving early childhood education and school readiness; development of emergency preparedness plans; volunteer promotion and recruitment; access to information and referral resources; and, most recently, financial literacy/asset building.
- The United Way is partnering with several community organizations to develop strategies for impacting urban sprawl, concentration of poverty, education, health and human service infrastructure, access to health care for uninsured, emergency preparedness, domestic violence, unemployment and other community issues.
- Because of its history, broad-base support and the multitude of member agencies and programs supported, the United Way is uniquely positioned to influence strategy development.

Utilizing community volunteers, the United Way distributes funds raised to priority human service issues and programs.

- The United Way supports programs in three service priority areas: Helping Youth Succeed, Building Strong Families, and Providing for Basic Needs. Service areas and programs are assessed on a regular basis by volunteers.
- Over 100 volunteers review program requests from member agencies during the Volunteer Review Process and recommend allocations to the Board of Directors.

Because of its relationship with member agencies, the United Way is able to report measurable outcomes of funded agency programs and assure a baseline standard level of agency accountability.

- Volunteers review funded program outcomes on an annual basis. Outcomes provide a basis for determining the ability of United Way, through its member agencies, “to improve people’s lives...”
- Volunteers review agency operations every three years using well-defined accountability criteria.

IMPERATIVES

Revenue *Increase amount of revenue.*

GOAL 1: Increase the Annual Campaign to \$8.2 million by the year 2010.

OBJECTIVE 1: Increase campaign participation in all categories.

- Increase employee participation to 30% (potential estimated to be \$871,000 in three years).
- Cultivate new corporate accounts that result in 45 new employee campaigns.

OBJECTIVE 2: Close the backdoor by strengthening communication with individuals so that their commitment to United Way extends beyond the workplace.

- Implement a proactive communications program to identify and cultivate these individuals to secure their continued commitment to the Annual Campaign.
- Build a bridge beyond the workplace with “Contributors in Transition” (CIT) – individuals who have retired, been laid off or made a job change (e.g. working outside York County or with a non-supportive company).
- Conduct pilot CIT Audit with top 100 accounts Year 1. Conduct CIT Audit with all companies annually, beginning with Year 2.
- Every three years conduct comprehensive review of individual givers by circulating list to staff and volunteers.

OBJECTIVE 3: Increase the Tocqueville Society membership to 100 by 2010 (56% increase in membership).

- This strategic objective will be accomplished by continuing ambitious recruitment strategies, implementing creative retention strategies, and developing activities to strengthen “the Society” experience for members through improved personalized communications and successful special events.

OBJECTIVE 4: Increase First Capitol Club membership to 1,200 contributors (26% increase in FCC membership).

- Strengthen the promotion of leadership giving inside and outside the workplace. Activities will include enhanced communications with CEOs, campaign coordinators, and more personalized

correspondence with current leadership givers. Develop strategies to strengthen philanthropy connection with current and potential leadership givers who are women.

OBJECTIVE 5: Conduct a Can-do analysis following the 2007 campaign.

- This assessment is a comprehensive analysis of all United Way activities and their impact on the workplace campaign. The review would include an evaluation of how staff resources are utilized.

GOAL 2: To increase the number of known gifts to the United Way endowment from the current 12 to 50 over the next three years.

OBJECTIVE 1: Identify and cultivate top 100 list of individuals who are prime candidates for endowment.

OBJECTIVE 2: Develop strong endowment message to be used in written publications.

Value Proposition

Communicate, promote and demonstrate value proposition to the community.

GOAL 1: To create a strategic communications plan to market the value proposition to the community.

OBJECTIVE 1: Utilizing target audiences previously identified, create key messages, materials, activities and communication channels for reaching audiences.

OBJECTIVE 2: Prepare a realistic budget for implementation.

GOAL 2: To implement the strategic communications plan.

GOAL 3: To evaluate the results.

Community Needs/Priorities

Align priorities, as determined by the Community Impact Division, with the United Way's response to addressing community needs.

GOAL 1: Inventory internal and external programs provided or supported by UW to determine alignment with mission, including YorkCounts, Focus On Our Future, Healthy York County Coalition, FIRST, The Volunteer Center, SecureCorps and other initiatives.

OBJECTIVE 1: Develop or locate an existing assessment tool.

OBJECTIVE 2. Assess staff and volunteer time and financial support going into each initiative.

OBJECTIVE 3: Determine the measurable community and program level outcomes, including return on investment, received for our participation.

GOAL 2: Create and implement an on-going process to determine the priorities for Focus Areas.

OBJECTIVE 1: Assess the current structure of the Focus Areas and analyze current funding by agency programs in each Focus Area.

OBJECTIVE 2: Analyze investment by agency and program to determine whether funding is based on priorities or historical allocation amounts.

OBJECTIVE 3: Expand ability to identify priorities based on a valid needs assessment by partnering with York County to conduct a needs assessment with ability to update in the future.

OBJECTIVE 4: Revise internal allocations process to structure a 3-year process with priorities identified for Year 1 and allocations based on those priorities for up to 3 years based on funds available.

OBJECTIVE 5: Define "Safety Net" services for United Way of York County.

GOAL 3: Develop a funding process that meets new or emerging priorities.

OBJECTIVE 1: Analyze structure of review process for community partnerships, new programs and initiatives and other monies allocated through the Special Response Fund.

OBJECTIVE 2: Develop a revised review process that will involve more volunteers, maintain integrity of fund and respond to priorities and new or emerging needs.

OBJECTIVE 3: Create Community Impact marketing/branding plan.

GOAL 4: Research options for launching new initiatives and determining community response.

OBJECTIVE 1: Explore “Neighboring,” a process to identify community/neighborhood assets to solve a community problem.

OBJECTIVE 2: Identify foundations/grants relative to new initiatives such as Financial Literacy.

OBJECTIVE 3: Research UWA information and initiatives in place at other United Ways to assess viability of replicating a quality program in York County.

Volunteer Engagement ***Cultivate and develop individual commitment.***

GOAL 1: Develop and implement an integrated volunteer plan.

OBJECTIVE 1: Uniformly identify United Way Volunteer opportunities.

OBJECTIVE 2: Develop a new volunteer orientation program and create a schedule for annual delivery.

OBJECTIVE 3: Develop a communication plan for recruiting United Way volunteers.

GOAL 2: Retain volunteers by utilizing the volunteer life-cycle model.

OBJECTIVE 1: Educate staff on the volunteer lifecycle and identify areas or volunteer pools for implementation.

OBJECTIVE 2. Conduct focus groups to better understand the current volunteer perspective.

OBJECTIVE 3: Assess demographics of current United Way volunteers (age, gender, race/ethnicity, professional occupation, and current stage in volunteer lifecycle).

OBJECTIVE 4: Establish correlation between identified volunteer opportunities and the ideal match for volunteers based on their lifecycle placement.

OBJECTIVE 5: Effectively match volunteers with opportunities that meet the need of United Way and the volunteer.

GOAL 3: Identify and implement strategies to engage individuals from identified target segments.

OBJECTIVE 1: Expand campaign communications with retirees to promote volunteer opportunities.

OBJECTIVE 2: Develop and implement a communication program to support “capacity building” among female contributors and volunteers.

- This communication program will promote and celebrate women’s philanthropy and connect individuals to enriching volunteering and mentoring opportunities.

OBJECTIVE 3 Identify opportunities for connecting with the young professionals in the community.

OBJECTIVE 4: As resources allow, consider other target segments for future development.

Civic Engagement
Cultivate civic engagement.

GOAL 1: Provide a leadership role in convening organizations and community representatives around community issues identified as a priority by the Board of Directors.

OBJECTIVE 1: To develop a strategic plan, in alignment with the overall United Way strategic plan, for each initiative.

- Volunteer Center
- Focus on Our Future
- Financial Literacy
- SecureCorps
- Taxpayer Assistance Program

OBJECTIVE 2: To monitor, initiate and actively engage in public policy activities, i.e., education, advocacy, etc.

OBJECTIVE 3: To recruit volunteer representation from the community to advance the mission of the initiative in a meaningful and effective manner.

OBJECTIVE 4: To develop measurable outcomes for each initiative and to be held accountable.

GOAL 2: Collaborate with other organizations around issues of importance to the community and appropriate for United Way support.

OBJECTIVE 1: To represent the United Way on community coalitions and initiatives where the United Way has made a financial investment.

- YorkCounts
- Healthy York County Coalition
- Other – To Be Determined

GOAL 3: Partner with other organizations to advocate for positive impact on human service needs and nonprofit infrastructure.

OBJECTIVE 1: To represent the United Way on other community coalitions and initiatives in alignment with our mission.

- Voluntary Organizations Active in Disaster
- Family Issues Roundtable
- Healthy York Network
- Other – To Be Determined

GOAL 4: To be actively engaged in partnerships, collaborations, and initiatives with other united ways, United Way of Pennsylvania and United Way of America.

Accountability

Continue to maintain high quality standards for accountability.

GOAL 1: Maintain 100% compliance with United Way of America membership criteria.

OBJECTIVE 1: Schedule all policies and procedures to be reviewed and updated on a regular basis.

OBJECTIVE 2: Ensure compliance with all membership requirements established by United Way of America.

GOAL 2: To maintain United Way operations in an efficient and effective manner.

OBJECTIVE 1: Utilize zero-based budgeting techniques in development of the annual operational budgets.