

Steuben County United Way

Vision

Steuben County United Way is recognized for providing leadership to engage the community in meeting local needs through collective action.

Mission

The mission of the Steuben County United Way is to gather, in an accountable manner, community resources to support agencies and programs that address basic health and human service needs to help improve the quality of life in Steuben County.

Values

Serving the Steuben Community with the purpose of improving lives through:

- Capacity building for community nonprofits
- Creating partnerships to address community needs with a sense of inclusiveness.

Goals

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| A. Campaign and Funding | Expand United Way Campaign's Reach and Increase Campaign Effectiveness. |
| B. Collaborations | Engage in partnerships/collaborations that create positive changes with measurable results. |
| C. Community Perception | Improve Community Perception of the United Way. |
| D. Governance | Increase Board Recruitment and Engagement. |

Strategic Plan

January, 2009 – December, 2012

Steuben County United Way

Goals

Objectives

A. Campaign and Funding

		Baseline	1 st Year	3 rd Year
A. Campaign and Funding	Develop a tactical plan to reach new markets.	New	Identify new markets and develop annual plan to reach new markets.	Tactical plan reviewed and updated annually with benchmarks for new markets met.
	Review current campaign plan by January 2009 and review annually.	Ongoing	Analyze the campaign plan and develop strategy to address projected economic conditions.	Annual review completed by the campaign cabinet, resulting in campaign strategy suggestions for upcoming campaign.
	Implement campaign plan in 2010 resulting in a 5% increase in individual donors and an increase of 5 companies for 2009/2010 campaign.	New	Analyze the divisions with greatest growth potential and develop a growth strategy for each division. Include growth strategy in campaign training to develop ownership among volunteers, resulting in increased campaigns.	Adjust campaign plan based upon 2010 results and set growth benchmarks annually.
	Update and maintain database of current and potential individual and corporate donors.	New	Clean up the data in current database by August.	Expand the donor profiles in the database to provide information needed for individual and corporate donor cultivation.
	Develop a vision council that will prepare a tactical plan for grants distribution.	New	Recruit vision council with commitment to create a tactical plan in the first quarter of the second year.	Vision Council reviews tactical plan results annually, and adjusts tactical plan based on results and community needs.

B. Collaborations

		Baseline	1 st Year	3 rd Year
B. Collaborations	Develop and maintain partnerships with three other nonprofit organizations through 2010.	As of January 2009, collaborate with three organizations: Comm. Found. Breeden YMCA Steuben Co. Literacy Coalition (Note: none of these organizations are funded by UW)	Identify nonprofit organizations (not necessarily funded by UW) that have potential to partner with UW to impact community. Begin to cultivate partnerships.	UW is actively involved in partnerships with three other nonprofit organizations resulting in improved impact on the community.
	Develop one United Way led program that addresses realistically an identified need. (Dir – 4 communities)	New	Program developed. Unemployment Task Force	Program Implemented with measurements tools to evaluate results.
	Strengthen relationship with community nonprofit organizations.	Relationship building has been underway.	Develop plan that is intentional about relationship building.	Implement plan resulting in stronger relationships between the nonprofit organizations and the United Way as demonstrated by participation in Summit and feedback from nonprofit focus group.

CSFs / Barriers

Strategies

A. Campaign and Funding

Critical Success Factors

- Identify the labor pool to do this
- Manpower/hours/effort

Barriers

- Relationships weak at Fremont Schools and Cameron
- Current economic conditions
- The businesses that are leaving the area
- Perceived lack of money to donate
- Do we have expertise to develop tactical plan?
- Do we have "people power" to develop/maintain database – this will require a lot of hours?

A1.	Engage in sectors besides industry
A2.	Examine and improve campaign organization structure.
A3.	Develop a campaign plan to reflect the realities of the economy today.
A4.	Recruit a 2-3 person team and have them develop database.
A5.	Develop process to review and redesign campaign annually.
A6.	Campaign and Funding (Alternative) - Larry and Dave focus on this goal.
A7.	Determine how funding is derived: % Campaign % Fundraisers % Grants
A8.	Investigate Grants – What are the sources and how do we get to them?

B. Collaborations

Critical Success Factors

- Must network
- Develop at least one relationship by September 2009
- Identify target organizations
- Determine how to identify need
- Determine how to strengthen partner agencies

Barriers

- Time commitment
- Continued downward trending economy

B1.	Engage in partnerships Identify needs Engage appropriate partners
B2.	United Way networking with the community Bringing our strengths to the community
B3.	Focus on media presence Email/Perception Prioritizing PR committee recruitment Websites, newspaper/blog
B4.	Strengthen relationships through increased interaction 2X/year agency meeting
B5.	Relationships with partner agencies reflect mutual respect. Adhere to agreements Endorse one another Effective communication Understanding of funding process (community impact on identified needs)
B6.	Community Impact (outreach & addressing community needs in a measurable way) + Relationships (Refine/define member agencies & need to partner) – Yvonne & Darci focus on goal.

Steuben County United Way

Goals

Objectives

C. Community Perception

		Baseline	1 st Year	3 rd Year
	Utilize existing needs assessments to establish community role through 2009; establish or resurrect three outreach events by 2010.	Needs assessment written and distributed with limited response. Stats available in the community includes: Literacy / Education, Family Stability, Financial Stability / Basic Needs	Determine desired community role by end of 2009. Research available data on community needs. Make plans to establish or resurrect three outreach events by end of 2010. - Summit - Day of Caring - Unemployment Task Force	Established role in the community. Compile community needs results and market how UW work addresses needs. Based upon survey results, the community sees the United Way as addressing community needs. Three events held annually.
	Use focus groups and media to measure community image and perception.	New	Media imprints focus on goals/community impact rather than just fund raising.	Assess image annually utilizing local paper's online poll.
	Have a media presence at least one time monthly and develop donor branding plan (PR comm.)	Media imprints, but not based upon plan.	Increase of media imprints to beyond campaign and allocation time period. Begin development of donor branding plan.	Media presence at least one time monthly. Donor branding plan fully developed and implemented.
	Director demonstrates leadership through community involvement in five networking organizations and attendance by United Way director or board representatives at these.	Currently involved in 10 networking organizations.	Current involvement assessed to determine benefits of maintaining current networks and if need to eliminate participation in any networks due to lack of benefit. Appropriate networks maintained, and time devoted to networks with most promise of return on time invested.	Involvement in networking organizations results in United Way making a greater impact on the community.

C. Community Perception

Critical Success Factors

- Measurable, Successful Outcomes
- A good needs assessment. We only have a small sampling.
- Board as ambassadors
- Good, active PR committee
- Contacts for poll or survey – determining who to contact

Barriers

- Money to help create UW presence (advertising)
- Community viewing us as inefficient or ineffective – being under goal, etc.
- Find a clean, unbiased basis for obtaining data

C1.	“Mission” of United Way is reflected in activities.
C2.	Create United Way led programs, collaborations/partnerships that create positive changes.
C3.	Establish our role in the community by May 2009, then start by January 2010: what, how, and who.
C4.	Make public more aware of how we help by always naming agencies at all events.
C5.	Increase visibility of United Way by assuring the United Way is intentional about marketing its role in collaborative efforts.
C6.	Educate the public about the United Way’s campaign and allocation process.
C7.	Attend Agency Fund Raisers to have a United Way presence, demonstrating partnership.
C8.	Create sense of permanence in leadership by supporting/marketing our director and making sure she stays!
C9.	Community Impact – Yvonne and Darci focus on this goal.

Steuben County United Way

Goals

Objectives

		Baseline	1 st Year	3 rd Year
D. Governance	To have every board member involved with some United Way component (outside of fund raising) that they care about.	New	Each board member selects committee or specific UW component (outside of fund raising) for involvement.	Board members are given the expectation for involvement during the recruitment process. Every board member is actively involved beyond fund raising.
	To expand the board to increase effectiveness.	As of January 2009, 11 Board Members, including 3 students.	14 Board Members by March 2009. Develop Board Matrix with skills and connections.	17 Board Members with a full spectrum of skills and connections.
	To lose no more than 2 Board Members prior to term limit.	New	Analyze reasons for board member loss and address the causes.	Lose no more than 2 Board Members prior to term limit annually.
	To have Board Representation from each town (at least one from each).	New	Recruit Board Members to represent communities not currently represented on the board.	Create and Implement the Board Recruitment Plan that assures community representation.
	To have Board Representation from medical, banking, retail, youth, industry, and professional sectors.	New	Recruit Board Members to represent sectors not currently represented on the board.	Create and Implement the Board Recruitment Plan that assures identified groups have representation.
	Create Student Board with representation from four high schools in order to develop leadership and partner in community impact.	2 Student members on the United Way Board	Organize Student Board within the first year and develop tactical plan in the second year.	Student Board active and meeting their goals.

CSFs / Barriers

Strategies

D. Governance

Critical Success Factors

- Identify answer to "Why do people leave before term limits?"
- Board Growth
- Effective Board Member Recruitment
- Show them how it can be done. Demonstrate the rewards.
- Board expansion into industry.
- Development
- Identify pool of possible candidates.

Barriers

- Need to stop shrinkage of board.
- Perceived lack of time and resources to commit.
- United Way perception – too much change.

D1.	Create Board Profile: Current members, Current needs, Skill-set groups, etc.
D2.	Create a list of Potential People for Board Members and Committee Members
D3.	Identify and Promote Opportunities for Engagement: Short-term jobs, Committee jobs, Allocations, etc.
D4.	Create multiple entry points for volunteerism.
D5.	Board (2 person- Yvonne and Steve) committee create and implement board recruitment plan Yvonne Prep Board Matrix Committee kick off in January – Board names and Committee names
D6.	Provide Board Education Tools and Enrichment Opportunities (Board Officers and Executive Director)
D7.	Establish role of our youth board members by June 1, 2009 (or January?)
D8.	Board Development (Growing) – Becky and Steve focus on this goal