

Shelby County United Way

Strategic Plan



Process Began January 2006
Revised April 19, 2006 per Board Action
Plan Finalized and Approved January, 2007

**SHELBY COUNTY UNITED WAY
STRATEGIC PLAN
January 2006**

VISION STATEMENT: TO LEAD COLLABORATIVE EFFORTS IN BUILDING A BETTER COMMUNITY.

MISSION STATEMENT: TO CONTINUALLY IDENTIFY, EVALUATE AND MAKE POSSIBLE HUMAN SERVICES IN OUR COMMUNITY.

OUR VALUES: COMPASSION, INTEGRITY, COMMUNITY LEADERSHIP, SERVICE, VOLUNTEERISM.

EXTERNAL ENVIRONMENT

- Disasters will continue to occur. (-)
- Business leadership will continue to change and move out of the community. (+/-)
- Stability of larger donor businesses. (+)
- Large industrial base. (+)
- Continued competition for donor dollars. (-)
 - tax increase (-)
- Rising cost of services (-)
- Changing demographics (+/-)
 - age
 - type of employment
 - immigrant population
- Consolidation of United Way chapters and agencies. (+/-)
- High probability of losing major United Way agency. (-)
- Agency connected. (+/-)
- Community awareness. (+/-)

STRENGTHS:

- United Way culture – responsive and committed
- Generosity of existing donors.
- Volunteer activity/commitment.
- Engaged board; community connected and healthy turnover.
- Reputation of United Way
 - recognition of need
 - transparency
 - strong, passionate leadership
- Goal oriented; “gets things done”; results.
- Strong agency network.

WEAKNESSES:

- No structured method for data gathering and analysis of needs.
- Community awareness.
- Narrow fundraising technique.
 - workplace donors.
 - no focus on retention.
 - not reaching all potential donors.
- Agency vulnerability; limited knowledge of outcomes, financial condition and services.
- United Way staff and facility size drives programs.
- Dependency on major funders.

OPPORTUNITIES:

- Additional partnerships and collaborations with business, industry, agencies, and individuals.
- Leadership training for agency boards and community leaders. (focused on revenue generation and collaboration.)
- United Way board to agency link. board member oversight; agency.
- technology utilization.
 - agency and donor communication.
 - key communicators.
 - periodic communications.
 - leverage e-mail database.
 - educate public.
- Target selected demographics (retired, newly employed).
- Alternative donation avenues. (endowments)
- Leverage best practices of United Way, agencies and other fundraisers.
- Increase support and involvement of outside community leaders.

THREATS:

- United Way (national) scandal or broad application of scandal at a United Way agency.
- Natural and economic disaster.
- Stronger agency or other fundraising campaigns.
- Company ownership changes; financial stability of businesses in area; reduced commitment to the community by area businesses.
- “Victim of own success” – community perception that their support is unnecessary.
- United Way success is tied to giving/campaign goals. Too focused on money.

SUMMARY OF PRIORITY ISSUES

- Community perception of the Shelby County United Way
- Agency relations
- Fundraising/financial security

PRIORITY ISSUES

Issue: Community perception of the Shelby County United Way. (Chair - Sara Olding; Members Jake Romaker, Dave DeVelvis, Ron Burns, Rick Steenrod, Mark Vondenhuevel, Jana Potts); (effective January 1, 2007 – Chair – Stan Crosley; Members Ron Burns, Dave DeVelvis, Rick Steenrod, Mark Vondenhuevel, John Deeds, Deb Hovestryedt, Jana Potts)

Objectives:

1. Improve communication with the business community whose leadership is many times outside of the community and subject to frequent reassignment.
2. Target changing community demographics: age, type of employment, immigrants, income etc.
3. Leverage the generosity of existing donors.
4. Develop strategies to successfully compete for donor dollars.
5. Utilize technology to communicate with target agencies, donors, and key communicators. Develop both Web Site and periodic communication material; leverage the use of the e-mail address database.
6. Incorporate best practice methods of other United Ways, Agencies, and Fundraisers in developing communication/marketing plan.
7. Improve the support and involvement of community leaders that are outside of the Sidney corporate limits.
8. Develop a communication plan that targets all potential donors.

Action Steps: To be developed and presented at the January 2007 Board Meeting.

Issue: United Way and Agency relations. (Chair - Bob Parker; Members - Janice Benanzer, Rhonda Keister, Clyde Verhoff, Loisann Kerns)

Objectives:

1. Mitigate the rising cost of services.
2. Insure that community needs are addressed as United Way Chapters and Agencies consolidate or disappear.
3. Maintain a strong agency network. (Need to define “strong”.)
4. Improve information resources for Agency outcomes, financial condition and services.
5. Develop leadership training for Agency Boards and Community Leaders. Focus on revenue generation and collaboration.
6. Establish United Way Board to Agency Board link to improve oversight and information.
7. Develop emergency plans to address a United Way (National) scandal or broad application of a scandal at a United Way Agency.

8. Develop strategies for leveraging strong campaign efforts of other Agencies or Community Fundraisers.

Action Steps: To be developed and presented at the January 2007 Board Meeting.

Issue: Fundraising/financial security. (Cindy Helman – Chair; Members – Ric Abbott, Tony Schroeder, Loisann Kerns, Jana Potts); (effective January 2007 – Chair – Ric Abbott; Members – Tony Schroeder, Shane Borchers, Loisann Kerns, Jana Potts)

Objectives:

1. Disaster contingency plan.
2. Strengthen relationships with major corporations to mitigate impact of changing and out-of-community leadership.
3. Continue to leverage larger donor businesses.
4. Develop alternative fundraising strategies to augment workplace donors.
5. Identify all potential donors.
6. Develop a donor retention plan.
7. Eliminate dependency on major corporate donor.
8. Target selected demographics for fundraising campaign (retired, newly employed etc.)
9. Investigate and recommend alternative donation avenues i.e. endowments.
10. Leverage best practices of United Way, Agencies and other Fundraisers.

Action Steps: To be developed and presented at the January 2007 Board Meeting.

United Way Action Plan

Committee Leader: Stan Crosley

Team Members: John Deeds
Rick Steenrod
Mark Vondenhuevel
Dave Develvis
Ron Burns
Jana Potts
Deb Hoevestrydt

Priority Issue: **Community Perception**

Key Objective:

We will establish a program that will expand the percentage of donors by increasing awareness that we are a community solutions provider in Shelby County.

Steps	Who	Target Completion Date
<p>Define the program : Development of a program to educate Shelby County residents about the mission of Shelby County United Way.</p>	Sara	June 29
<p>Determine possible priority initiatives of the program</p> <ol style="list-style-type: none"> 1. <u>Informational Program</u> (video and/or pamphlet) 2. <u>Community Perception Questionnaire</u> (professional instrument and/or informal feedback tool) 3. <u>Countywide Community Outreach</u> (sending SCUW representatives to local civic meetings, fairs, festivals, etc.) 	Dave	September 14
<p>Evaluating the means and feasibility of accomplishing our goal</p> <p>Organization of a Timeline for each initiative Volunteer Availability Committee Structure Prioritizing Effective Targets Determine cost/benefit of each initiative</p>	Mark	November 30
<p>Finalize implementation of the program</p> <p>After cost/benefit analysis, the priority initiatives were not recommended for implementation. The marketing committee will support fundraising/financial security initiatives.</p>	Stan	December 30

United Way Action Plan

January 29, 2007

Committee Leader: Bob Parker

Team Members: Janice Benazer – Vice Chair
 Rhonda Keister
 Clyde Verhoff
 Loisann Kerns
 Iddy Andrews

Priority Issue: Agency Relations

Key Objective

- How do we take the successes from our most successful agencies and pass those strengths onto our other agencies so they are meeting the expectations of the Shelby County United Way and the agencies clients?

Steps	Who	Target Completion Date
Define United Way expectation – Review the Agency Agreement	Team	May 02, 06 Complete
Determine the strengths of our strong agencies * Board Members & Agency Leadership believe in their agency * Agencies have well developed and lasting relationships with the community * Financial stability among the agencies * Local media is very supportive in publicizing the needs / accomplishments of the agencies * Agency has a strategic plan of objectives; has direction and vision for the future * Has ties / connections to the community leaders; agencies are well known	Bob & Rhonda	September 01, 06 Complete
Determine the written tools a board member is given as the new board member begins serving – Handbook; Policies? * Have written manual with up-to-date policies	Janice & Loisann	September 01, 06 Complete

<ul style="list-style-type: none"> ▪ Iddy to secure panel (Ideal Board Scenario); M. Spicer; J. Raible; J. Romaker. ▪ Iddy to gather list of questions for panelists. ▪ Roger Grinstead presentation – “Donating to Non-profits.” <ul style="list-style-type: none"> • Discuss Logistics: Location; Time; Food; Takeaways <ul style="list-style-type: none"> ○ Training session tentatively set for Feb 16, 2007. ○ Agenda: 8-11 Presentation; 11-11:30 Breakout / lunch; 11:30-12:15 Roger Grinstead; 12:30-1:30 Panel. 	<p style="text-align: center;">Clyde</p> <p style="text-align: center;">Loisann</p>	
<p>Provide follow-up session from February’s meeting for agencies to check progress and offer additional help</p> <ul style="list-style-type: none"> • Possibly add a check meeting with Agency Executive Directors early Second Qtr. Purpose is to offer any additional help and let them share their successes. • Possibly hold a check meeting with the February participants in June for improvement update. 	<p style="text-align: center;">Team</p> <p style="text-align: center;">Bob</p> <p style="text-align: center;">Team to decide</p>	<p style="text-align: center;">March 15, 07</p>

United Way Action Plan

Committee Leader: Ric Abbott Team Members Iddy Andrews
 Shane Borchers
 Priority Issue: Fundraising/Financial Security Lois Ann Kerns
 Jana Potts
 Tony Schroeder

Key Objective:

In an ever-changing economy and fundraising environment, we must establish a mechanism to discover, evaluate, and advise fresh, successful means to promote the Shelby County UW's financial security by 12/31/06.

Steps	Who	Target Completion Date
Define purpose of the mechanism The mechanism will be the catalyst to forward the efforts of the UW from the "hopeful/determined" campaigning year-to-year to a predictable, sustainable, and increasing non-profit entity that maximizes donor's allocable dollars.	Cindy	Complete
Determine possible priority initiative(s) of mechanism Leadership Giving Endowment Funding/Planned Giving Youth Initiative Women's Initiative Pacesetter Campaigning	Jana	Complete
Evaluate means of accomplishment (manpower) Transition Period Facilities Committee Structure	Tony	Complete
Develop feasibility study (budget, space, limitations)	Iddy	12/15/06 Complete
Presentation of mechanism (board retreat)	Ric	1/07

Updated 1/31/07