



United Way of the Franklin & Hampshire Region

United Way of the Franklin and Hampshire Region (UWFH)

# Strategic Plan FY 23-FY25

October 24, 2022

## Overview

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As part of the merger of the United Ways of the Franklin and Hampshire Region, the Board of Directors called for a new strategic plan. The timing is critical:

- **The merger necessitates a solid vision** for our newly formed organization. A strong strategic plan provides a roadmap as well as inspiration
- **Decades-old challenges** to United Way campaigns have been exacerbated by the pandemic
- **The traditional United Way model has become obsolete:** In previous years, UWFC and UWHC both made significant progress away from the traditional United Way model and towards an impact focused model with more programming. However, the pandemic was a major setback for our progressive grant making and maintaining fundraising at the highest level

It is worth celebrating that 2022 marks the 100<sup>th</sup> anniversary of the first United Way campaign in our region. Over the past century we estimate that United Ways (and their precursor Community Chests) have invested at least \$50M back into our local communities to meet basic needs

### UWFH Mission

UWFH's mission is to work in partnership with our community to identify and address our region's most pressing issues. We inspire and engage individuals and organizations to invest together in overcoming those challenges.

### UWFH Vision

Our vision is that all individuals and families have equitable access to the tools and resources to support their basic needs and ensure future successes. In doing so, we build a strong, vibrant, and inclusive community.

### UWFH Values

**Equity:** We understand and acknowledge that we live in a world with systemic racism, economic disparities, and other forms of intersectional disadvantages. We are committed to addressing those inequities at the organizational and individual level

**Human Dignity:** We treat all people respectfully and operate in ways that celebrate everyone's humanity

**Collaboration:** We work collaboratively with each other, our partners, and our communities to make the most of our combined resources

**Accountability:** We hold ourselves accountable to high ethical, administrative, programmatic, and fiscal standards

**Curiosity & Learning:** We strive to ask questions rather than make judgements. We are committed to learning from our successes and our mistakes.

**Goals and Strategies** (Goals are numbers. Strategies are letters)

1. Campaign is at 1.6 million in FY 25 (This will be assessed and adjusted at the end of FY23)
  - a. Determine UWFH financial impact on our region and communicate that to existing donors and potential new donors
  - b. Identify potential new donors and better understand the capacity of current donors through relationship building
  - c. Establish metrics for tracking donor cultivation and stewardship and meet or exceed those metrics
  - d. Stabilize workplace giving from current workplaces and grow through recruitment of returning and new workplaces
  - e. Cultivate engagement and giving within communities of color and other diverse communities
2. Assess **Collective Impact** and implement based on assessment, and assess our long-term granting processes and implement based on assessment
  - a. Use FY 23 to conduct a detailed assessment of collective impact
  - b. Conduct a larger assessment for long-term granting processes
  - c. Communicate any changes we are making and build buy-in from key stakeholders
  - d. Ensure grantmaking is inclusive and addresses the needs of communities of color and other diverse communities
3. UWFH has established clear DEI goals and has established metrics to evaluate progress on those goals and is making progress on those goals
  - a. Provide DEI learning for the board
  - b. Provide DEI learning for the staff
  - c. Regularly assess organizational culture, fundraising practices, programming and grantmaking practices with a DEI lens and make changes when needed
4. Diversify revenues
  - a. Identify foundations and government funding for current programs: Diaper Bank, Read! Learn! Succeed!, Supper for 6, Blooming Backpacks
  - b. Write proposals for funding of the above programs
  - c. Assess major Collective Impact initiative
  - d. If Collective Impact assessment shows promise, review potential funding opportunities and partnerships and, if available, apply for grants to support efforts by FY 25.

5. Increase support to our local community
  - a. UWFH's operational budget is lean, focused on the most important aspects of operations
  - b. Operational budget maximizes use of non-campaign revenues
  - c. Explore incorporating COSA into UWFH
  - d. Create an emergent needs fund and ensure grantmaking decisions reflect the needs of communities of color and other diverse communities
  
6. Continually review and improve operating systems and efficiencies
  - a. Assess operations to identify ways to do things more efficiently.
  - b. Implement ideas that are cost-saving, efficient and donor and agency centered
  - c. Conduct annual staff satisfaction survey. Consider changes based on results
  - d. Ensure that the board culture and staff culture are inclusive and equitable
  
7. Seize on opportunities that are presented to UWFH
  - a. Develop criteria that will help us assess opportunities