

United Way of Greater Greensboro

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STRATEGIC GOALS AND OBJECTIVES - 2012

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Goal 1 - Community Engagement and Investment

1. Establish a leadership position in partnership with key community stakeholders that supports programs and initiatives that produce the best outcomes, achieve the greatest results, and address the community-wide prioritized needs.
2. Maintain a balance between funds distributed to long-standing prevention and core services vs. high-priority programs and strategic initiatives, aligning funding with UWGG objectives and priorities

Goal 2-Raising Financial and Strategic Resources

1. Develop and maintain a comprehensive donor database enabling staff and volunteers to execute more effective campaign strategies and appeals
2. Strategically target companies that do not run a corporate campaign as well as those that have participated but have critical potential to the goal of broadening our base
3. Grow Cornerstone Society giving (\$1,000-\$9,999) by increasing the percentage of Cornerstone support to the total campaign from 22% in 2008 to 25% by 2011
4. Implement Endowed and Planned Giving plan to secure \$2 million new in outright gifts by 2012; increase endowment by \$16 million by 2015.
5. Begin the strategic groundwork necessary to implement a Customer Relationship Management (CRM) Culture

Goal 3-Relationship Building and Brand Awareness

1. Increase public knowledge and favorability about United Way's positive impact on programs that affect individual lives and improve community conditions
2. Develop and tailor messaging by community need to appropriate target audiences

Goal 4-Operations

1. Improve the accuracy of donor information recorded and stored on donor information system
2. Annually decrease overhead costs or the overhead percentage.
3. Recruit and retain skilled and effective talented staff

Goal 5-Organizational Leadership and Governance

1. Develop a board culture that accepts responsibility to follow through on all strategic goals and fiduciary issues in a transparent manner
2. Increase action with other community partners, and facilitate inclusive public dialogues around critical human needs to develop a shared vision
3. Develop a diversity plan and outreach strategy to engage new donors and community partners.
4. Develop formal plans and partnerships among United Ways in the region to include: joint campaign activity, back office consolidation, critical issue collaboration, and a coordinated approach to agencies in common.

Community Engagement and Investment (Goal 1)

Objective 1

Establish a leadership position in partnership with community stakeholders that supports programs and initiatives to achieve outcomes, addressing high-priority community needs in the areas of Education, Self-Sufficiency (Income) and Health.

Strategies

- Implement a community research and education process to prioritize needs. (September 2009)
- Broaden the number of partners committed to implementing the programs that achieve the greatest results. (beginning 2010, and ongoing)
- Create a public policy strategy to support the community-level initiatives. (February 2010)
- Develop and enhance systems to respond to an immediate crisis. (July 2010)

Measurements

- Number of funding partnerships established
- Measured outcomes

Objective 2

Maintain a balance between funds distributed to long-standing prevention and core services vs. high-priority programs and strategic initiatives, aligning funding with UWGG objectives and priorities.

Strategies

- Develop specific, measurable goals within each Focus Area. (October 2009)
- Based on the community needs assessment, determine any new and/or additional specific, measurable goals within the Focus Areas. (October 2009)
- Prioritize the level of funds to programs meeting the most critical needs and achieving the best possible outcomes. (beginning December 2009, and ongoing)
- Develop a process to engage the CIC in program and in initiatives funding (January 2010)
- Engage issue experts in the Focus Area Committees and CIC. (January 2010, and ongoing)

Measurements

- Change in percentage of funds allocated to each

Raising Financial and Strategic Resources (Goal 2)

Objective 1

Develop and maintain a comprehensive donor database enabling staff and volunteers to execute more effective campaign strategies and appeals

Strategies

- Implement a system that ensures all communications to donors and volunteers is accurate and relevant (September 2009)
- Survey key donors and volunteers on accuracy of our information (December 2009)
- Increase the number of donors pledging online directly into United Way's database (December 2009)

Measurements

- 50 new companies to e-pledging
- 95% accuracy rate in donor communications
- High response rate received from survey

Objective 2

Strategically target companies that do not run a corporate campaign as well as those that have participated but have critical potential to the goal of broadening our base

Strategies

- Execute the New Business Development Plan to solicit business year round (December 2009)
- Penetrate small to mid-size companies not running campaigns (December 2010)
- Target existing company campaigns with greater potential (December 2010)
- Increase the number of campaigns representing the professional areas of Attorneys, CPA's , Architects, Engineers and medical community (December 2009)
- Increase donor participation with Caring Club Card GMA co-branding (December 2010)

Measurements

- 20 new campaigns (10% increase)
- 25 companies with increased giving (15%) increase
- 5% increase in physician donors
- 10% increase in the professional category
- Increase membership by 10%
- Increase the number of campaigns that run before traditional fall period

Objective 3

Grow Cornerstone Society giving (\$1,000-\$9,999) by increasing the percentage of Cornerstone support to the total campaign from 22% in 2008 to 25% by 2011

Strategies

- Cultivate: Expand cultivation of prospective donors outside of the traditional workplaces. (June 2010)
- Solicit: Solicit greater prospective donors by designing Cornerstone step-up program and expanding peer-to-peer solicitations. (December 2009)
- Engage: Increase engagement of Cornerstone volunteer champions and donors in United Way year-round. (December 2009)
- Recognize: Implement recognition plan and Celebrate Cornerstone Society donors. (Complete)
- Communicate: Develop and implement Communication Plan to build relationships, inform and connect with personal and corporate priorities. (September 2009)

Measurements

- New members/retained members
- New dollars generated (Individual pledges and gifts, sponsorships, grants, etc.)
- Increase in number of volunteers engaged with United Way
- Increase in number of presentations in community and workplaces

Objective 4

Implement Endowed and Planned Giving plan to secure \$2 million new in outright gifts by 2012; increase endowment by \$16 million by 2015.

Strategies

- Expanding on the development of our Legacy Society vision, purpose and engagement of volunteer champions.
- Expand marketing materials and communication plan (June 2009)
- Identification and cultivation of Top 50 prospects (December 2009)
- Expand Loyal Contributor plan (June 2010)
- Implement Recognition plan (June 2010)
- Recruit professional advisors and complete articulating policies (March 2010)
- Create and implement plan for \$1 million outright gift to endowment (June 2011)

Measurements

- Percentage of annual income coming from our endowment
- Number of visits with professional advisors
- Number of secured deferred planned gifts, charitable bequest
- Number of asks and commitments for outright gifts, which are outright contributions of cash, real estate, securities, and other property
- Number of asks and commitments for bequests, which are made through a will, trust, life insurance, or retirement plan

Objective 5

Begin the strategic groundwork necessary to implement a Customer Relationship Management (CRM) Culture

Strategies

- Develop the internal cross-departmental team that will represent the key areas of a CRM culture which are:
 - 1) Organization/Culture
 - 2) Operations/Process
 - 3) Data
 - 4) Communications/Marketing and
 - 5) Technology
- Internal Team to be in place June 1, 2009
- Implement CRM model organization-wide (July 2010)
- Benchmark key processes to track progress

Relationship Building and Brand Awareness (Goal 3)

Objective 1

Increase public knowledge and favorability about United Way's positive impact on programs that affect individual lives and improve community conditions.

Strategies

- Implement a year-round awareness-building campaign (December 2009)
- Develop strong partnerships with the media (August 2009)
- Recruit partners (agencies) to help "drive the message" (March 2010)
- Implement smaller and more focused events and targeted communications (June 2010)
- Solicit donor/volunteer feedback through specified mediums (December 2010)
- Align with community activities throughout the year (September 2009)

Measurements

- Increased number of media hits
- Survey that determines increase of United Way's favorability/impact conducted online through tool such as Survey Monkey or via written survey distributed at future "town hall" meetings with the community

Objective 2

Develop and tailor messaging by community need to appropriate target audiences

Strategies

- Broaden scope of message delivery through media, advertising, web and newer non-traditional mechanisms such as social media venues (June 2010)
- Increase communication activities among more diverse group of stakeholders (January 2010)

Operations (Goal 4)

Objective 1

Improve the accuracy of donor information recorded and stored on donor information system

Strategies

- Develop strategic plan for improved technology and donor information system (July 2009)
- Early communications with company HR departments to obtain current employee participation and giving numbers (July/August 2009)
- Greater time and review spent by staff (Donor Relations and Finance) on analysis of giving and participation information (August/September 2009)
- Transition from paper pledges to E-Pledge giving to allow donors to annually update their contact information (July/August 2009)

Measurements

- Staff reviews of individual, employee, and company statistics and e-mail addresses to ensure information is updated and correct
- Accurate reporting for CEO visits and other solicitation efforts
- Successful mass e-mail communications

Objective 2

Annually decrease overhead costs or the overhead percentage.

Strategies

- Regularly analyze and eliminate processes and events where costs exceed benefits and the focus is not directly related to organization's overall mission (July 2009 through June 2010)
- Develop plans when utilizing new technology to increase efficiency and decrease labor costs for internal operations (July 2009)
- Analyze costs and efficiencies of outsourcing or consolidating back office operations, including pledge processing, and utilize volunteers when cost effective (July 2009 through June 2010)
- Obtain multiple price quotes for annual reviews of contracts and major purchases (July 2009 through June 2010)

Measurements

- Standard overhead rate as reported to the IRS (form 990).
- Annual comparisons of actual administrative and fundraising expenses.

Objective 3

Recruit and Retain Skilled and Effective Staff

Strategies

- Ensure skills and experience of new staff meet minimum standards outlined in current job descriptions (July 2009 through June 2010)
- Develop and improve organizational and personnel policies that meet best practices and that are clear and consistently utilized (July 2009 through June 2011)
- Develop “reward” systems to encourage and retain the most talented staff (July 2009 through June 2010)

Measurements

- Comparison of annual staff turnover to previous year
- Benchmark to other community organizations’ results
- Improved Performance Evaluations on Staff
- Annual surveys from Staff

Organizational Leadership and Governance (Goal 5)

Objective 1

Develop a board culture that accepts responsibility to follow through on all strategic goals and fiduciary issues in a transparent manner.

Strategies

- Amend and update our organizational documents (Articles, Bylaws, etc.; change from member-nonprofit) and committee descriptions (delegation of authority and related matters). (December 2009)
- Incorporate discussion of fiduciary duties in annual board orientation. (Ongoing)
- Formalize board selection process to recruit leaders from key stakeholders who support the mission.(Spring 2010)

Objective 2

Increase action with other community partners, and facilitate inclusive public dialogues around critical human needs to develop a shared vision.

Strategies

- Present Community Needs Assessment results to address key issues. (Fall 2009)
- Convene groups regularly through a Town Hall meeting format. (Ongoing/quarterly)

Objective 3

Develop a diversity plan and outreach strategy to engage new donors and community partners.

Strategies

- Establish Board level diversity outreach committee to provide oversight and help engage community leadership. (July 2009)
- Initiate an internal cultural diversity audit and training/orientation for volunteers and staff. (Spring 2010)

Objective 4

Develop formal plans and partnerships among United Ways in the region to include joint campaign activity, back office consolidation, critical issue collaboration, and a coordinated approach to agencies in common.

Strategies

- Create forum to begin discussions among Triad United Way CEOs and Chairs. (Summer 2009)
- Develop Task force groups as specific activities move forward. (Ongoing)

Measurements

- Increased level of board attendance to meetings and public events.
- Formal feedback assessing board level knowledge of key community issues involving United Way's work.
- Development of board supported goals and strategies in the diversity action plan.
- Increased number regional United Way plans and activities.