

# United Way of York County, SC Strategic Plan September 2014 – 2016

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Developed in consultation with

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# Executive Summary

This document provides an overview of the United Way of York County's 2014 – 2016 strategic planning process and is designed to build a bridge from the organization's past accomplishments to its future desires. This process was facilitated by The Weathers Group and carried out by the United Way Board of Directors and staff.

The planning process began with gathering input from key stakeholders to help the board make more informed decisions and culminated in a 1½ day Board retreat. This plan is not meant to be static, and its written goals and objectives will continue to be updated and modified based upon the ever-changing landscape of the nonprofit sector, capacity of the United Way of York County, needs of the community, and input received from stakeholders.

The overriding conclusion that came out of the process is that the United Way of York County needs to redefine and restructure itself to better meet community needs. While we have ventured down a path to depart from the classic United Way model of being an umbrella organization which collects community donations and allocates them to worthy non-profit agencies, our early attempts at Community Impact have been well-intentioned and useful, but far from what they could be.

Through a community needs assessment and conversations with stakeholders of every type in York County--residents, service agencies, businesses and government--we aspire to be the force that pulls together the disparate needs of our community into a comprehensive response which will effect long-term positive change.

The challenge will be to develop and implement the new business model as quickly as possible while at the same time, continuing to deliver needed services and funding allocations to support the current model. We will also need to develop a transition plan from old to new, for a smooth transformation that ensures the community will support our plan and have a positive and enthusiastic view of the United Way of York County as we move forward.

## About the United Way of York County, SC

In 2005, the United Way of York County evolved from the melding of the United Way of Fort Mill-Rock Hill-Tega Cay and Western York County. It provides essential funding to support the work of community organizations, and forges strategic partnerships to create systemic change.

In an effort to improve the quality of life of families in York County, the organization focuses on:

- **Education** – helping children and youth achieve their potential
- **Financial Stability** – promoting financial stability and independence
- **Health** – improving people’s health

Governed by a Board of Directors, the United Way of York County runs independently of other United Way organizations. This autonomy offers the Board of Directors the opportunity to provide proactive policy making that is both responsive to local needs, and a reflection of the priorities and core values of York County residents.

## Strategic Advantages

Strategic planning offers an essential opportunity to assess where we are and chart a course for the future. This Strategic Plan will guide us in our decision making of allocating human and capital resources to achieve the identified goals, strategies, and objectives best suited to meet the needs of the residents of York County, SC.

## Vision

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*A community of healthy, educated and financially secure people.*

## Mission

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*United Way of York County transforms communities by offering opportunities which improve quality of life.*

## Values

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<b>Honesty/Integrity</b>	Conduct business and act in the best interest of the community; display good character.
<b>Accountability</b>	Understand our duty is to residents of York County, staff, and each other, and expect to be measured on results.
<b>Commitment</b>	Show unyielding determination to accomplish vision.
<b>Compassion</b>	Demonstrate genuine concern and feelings for others.
<b>Responsibility</b>	Accept the duty of finding solutions for community concerns.
<b>Collaboration</b>	Seek partnerships with non-profit and faith-based organizations, local government, and businesses, to collectively build a better York County.
<b>Transparency</b>	Share and receive information openly and honestly.
<b>Growing/Safeguarding assets</b>	Be good fiscal stewards of the resources entrusted to us by the community while using them for the common good.

# Assumptions

During the planning process staff acknowledged, documented, and, at times, verified the underlying assumptions that this plan is built upon. Assumptions are always at the foundation of any strategic plan, though they are often omitted or neglected. In the effort of transparency, the assumptions are documented below:

## We Assume

1. An increase in community awareness will create trust, understanding and accountability;
2. We will be met with enthusiastic cooperation from the stakeholders of York County; and
3. The majority of York County's non-profits, faith-based organizations, agencies, universities, businesses, local government and technical colleges will welcome mutually beneficial partnerships.

## We shall NOT Assume

1. The Board and staff understands the challenges facing York County;
2. We will not experience any decrease in future funding that will impact new goals;
3. Current donors and the community at large know the value of our work and its impact on the community;
4. We can attract and retain high quality and diverse staff to our organization.

# Critical Success Factors

The strategic plan requires more than goals and objectives; there are often intangibles that contribute to the success of the plan – we call these critical success factors. The achievement of goals, objectives, and the mission of this plan rely on the following:

The United Way of York County, SC will:

1. Remain fully active and intently engaged in creating and executing the plan;
2. Respect the opinions, ideas and input of each other;
3. Not act independently or make decisions for personal gain or agenda;
4. Act as a unit and stand behind decisions made as such;
5. Focus on and stay faithful to the mission, vision and values;
6. Consider the impact to all York County citizens in making decisions;
7. Create an action plan with foreseeable goals that will greatly influence community awareness;
8. Foster an environment that gives rise to trust; ensuring that our credibility driven by our competency and character continues to foster the community's confidence in our capabilities;
9. Use this strategic plan as a road map to move forward; and
10. Establish clear roles and responsibilities for the seamless communication and execution of the final plan.

# Goals & Objectives

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<b>Goal 1: Establish Business Model Based Upon Desired Community Impact</b>				
<b>Objectives</b>	<b>Desired Output(s)</b> (Quantitative Achievement, i.e., # participants, # visits, tangible deliverable)	<b>Desired Outcome(s)</b> (Qualitative changes over time, i.e. Changes in behavior, conditions, attitude, increase in skill/knowledge)	<b>Responsible Party</b>	<b>Due by</b>
1.1: Conduct new needs assessment, including public input.	Identify greatest needs in community and gaps in services. Completed assessment.	A guide for deciding United Way’s focus/model.	TBD	
1.2: Benchmark other United Way models and explore lessons learned.	Specific models that we can consider and “mold” with needs assessment results.	Food for thought to increase likelihood of making better decisions.	CPO	
1.3: Explore & develop future business model to support desired impact (Define Community Impact based upon community needs & our capacity) (Assess current initiatives for relevancy).	Clear investment priorities and plans for the future.  Allocation policy with specific funding expectations (i.e. ___% of \$\$ to basic needs).	Increased opportunity for sustainability. Better decision-making when allocating resources.	CPO and BOD	
1.4: Assess organizational capacity (staffing, resources, technology, etc.) to meet needs and achieved desired impact.	Assessment of organizational capacity. Priorities/Impact established based upon our capacity.	Future direction decided. Clear direction and priorities.	CPO, BOD	
1.5: Define staffing and resource development matrix required to sustain the new business model.	Staff development plan  Revised organizational chart  Resource Development Plan	Identified diversified funding sources.  Clear understanding of staffing required and resources dedicated accordingly.	Finance Committee, CPO, Executive Committee, HR Taskforce.	

## Goal 1: Establish Business Model Based Upon Desired Community Impact

Objectives	Desired Output(s) (Quantitative Achievement, i.e., # participants, # visits, tangible deliverable)	Desired Outcome(s) (Qualitative changes over time, i.e. Changes in behavior, conditions, attitude, increase in skill/knowledge)	Responsible Party	Due by
1.6: Review and modify model as necessary.	Achieve financial revenue goals and community impact goals.	Increased revenue, Increased impact of investments.	CPO, Board Chair	Annual
1.7: Encourage collaboration among partner agencies to maximize investments and leverage relationships	Host monthly best practices and 'sharing sessions'.	Elimination of duplicative services. Increased coordination of service providers. Increased impact	CPO	

## Goal 2: Communicate Funding Focus (Community Impact)

Objectives	Desired Output(s) (Quantitative Achievement, i.e., # participants, # visits, tangible deliverable)	Desired Outcome(s) (Qualitative changes over time, i.e. Changes in behavior, conditions, attitude, increase in skill/knowledge)	Responsible Party	Due by
2.1: Craft the message (story).	Talking points. Case statement. Strategic Narrative (Our "why")	Consistent, compelling message that appeals to diverse stakeholders.	CPO, BOD, Staff	
2.2: Communicate new message, direction and broad impact of the United Way.	Diversify marketing plan. (Use social media, speakers' bureau and various media channels to communicate story.)  Scheduled events. Marketing collateral.	A unified community message.  An increased recognition of the United Way impact.	CPO, BOD, Staff	

### Goal 3: Improve Governance Capacity & Organizational Infrastructure (staff)

Objectives	Desired Output(s) (Quantitative Achievement, i.e., # participants, # visits, tangible deliverable)	Desired Outcome(s) (Qualitative changes over time, i.e. Changes in behavior, conditions, attitude, increase in skill/knowledge)	Responsible Party	Due by
3.1: Identify the strengths and weaknesses of the current governance structure.	Research other non-profit governance structures to ascertain which model would effectively help the United Way of York County.	A guide for deciding United Way's focus/model.	TBD	
3.2: Amend the current by-laws to reflect relevant best practices.	Review and approve set of by-laws.	Food for thought to broaden our vision of whatever could be. Better decision-making.	CPO	
3.3: Identify and recruit board members focusing on diversity to guarantee the community at-large and clients are adequately represented.	Three to six new high-performing board members.	Future direction decided. Clear direction and priorities.	CPO, BOD	
3.4: Develop and implement a new board member orientation program.	Strong board orientation with specific requirements tied to service.	Consistent, compelling message with meaning we can all use.  Increase community understanding of mission/vision and initiatives.	CPO, BOD, Staff	
3.5: Institute a board profile to ensure the board members have the skills, talents, and connections relevant to the needs of the organization.	Board Profile (hard copy and/or electronic).		CPO	
3.6: Create a succession plan for board members, especially officers.	A plan and/or process for identifying and cultivating board members to move through the leadership pipeline.	A strong "bench" of board members ready and willing to assume greater leadership responsibility.	Executive Committee	

### Goal 3: Improve Governance Capacity & Organizational Infrastructure (staff)

Objectives	Desired Output(s) (Quantitative Achievement, i.e., # participants, # visits, tangible deliverable)	Desired Outcome(s) (Qualitative changes over time, i.e. Changes in behavior, conditions, attitude, increase in skill/knowledge)	Responsible Party	Due by
3.7: Offer competitive salaries & benefits.	Maintain salaries within a range comparable to other positions in the sector.	Increased retention and morale.	CPO and HR Taskforce	
3.8: Implement a newly revised employee performance evaluation process.	Revised performance evaluations. Written annual evaluations for each employee.	Employees have clear understanding of role, responsibilities, and expectations.  Performance challenges addressed more expediently and effectively.	CPO and HR Taskforce	
3.9: Develop and Implement a pay for performance productivity award. (board approved revision 3 12 15)	Enhanced productivity	Increased spirit of teamwork and camaraderie.	CPO and HR Task Force	

## Goal 4: Increase Community Involvement & Engagement

Objectives	Desired Output(s) (Quantitative Achievement, i.e., # participants, # visits, tangible deliverable)	Desired Outcome(s) (Qualitative changes over time, i.e. Changes in behavior, conditions, attitude, increase in skill/knowledge)	Responsible Party	Due by
4.1: Develop a comprehensive outreach plan.	The plan.	Increased community engagement and presence.	Workgroup	
4.2: Create a speakers bureau (Key volunteers, board, etc.).	Each board member speaks to groups.	Community sees organization as 'friend'.	Workgroup	
4.3: Increase number of volunteers.	Create & launch affinity groups.	Increase in volunteer engagement, community presence, and dollars raised.	Staff	
4.4: Increase participation at key community events.	Board and Staff are present at ____ # of community events.	Create pipelines to disseminate information and deliver message. Increased community engagement and presence.	Workgroup	
4.5: Create/conduct non-scientific survey to assess philanthropic/community interests of millennial.	Created and completed survey. ____ # of respondents.	Increase awareness of millennial interests. Better strategies to recruit and retain participation.	Staff	
4.6: Initiate and sustain a millennial social media campaign.	Campaigns of ____ social media platform (determined by survey results).	Increase millennial awareness/giving.	Staff	
4.7: Develop and launch college student-oriented event(s) in collaboration with the local universities/tech schools. (i.e. Get Connected)	____ # events per year with ____ of students reached.  Roster of potential volunteers and/or staff.	Increase college students' awareness of United Way.  Pipeline to cultivate future philanthropists and community volunteers.	Staff	

## Goal 5: Increase and Diversify Revenue Streams

Objectives	Desired Output(s) (Quantitative Achievement, i.e., # participants, # visits, tangible deliverable)	Desired Outcome(s) (Qualitative changes over time, i.e. Changes in behavior, conditions, attitude, increase in skill/knowledge)	Responsible Party	Due by
5.1: Create Signature Event.	Annual Signature Event.	Increased volunteers and community presence. Increased donors and community support. Key branding for organization.	Development Director, Staff	
5.2: Develop future donor campaigns.	____ new campaigns in schools per year.  ____ small business initiatives.	Increased funding and awareness.	Workgroup & Staff	
5.3: Research and develop a planned giving program (if feasible).	Planned Giving Policy. Established relationship with CPAs, Financial Advisors, Attorneys, Foundations in this field. Define internal processes and tools required to implement and sustain the program. Trained Resource Development staff.  Brochures, donor visits and volunteers.	Greater knowledge of the capacity needed to administer the program. Trained Resource Development Staff.  Established relationships with professionals to provide referrals and support.  Implemented program (if feasible).	Finance Committee, CPO, Development Director	