

Char-Em United Way Strategic Plan 2009 - 2011

Vision: To create continued improvement in the lives of people in Charlevoix and Emmet Counties.

Mission: To improve the lives of people in Charlevoix and Emmet Counties by working together to share community resources.

Goal	Objectives	Action Steps	Responsibility	Timeline	Progress 5-2010
1. MEET INCREASING NEED FOR EFFECTIVE LOCAL HEALTH AND HUMAN SERVICE PROGRAMS					
A. Align community allocation investments with CEUW's mission and vision and community needs					
		1. Utilize community needs assessment data to help determine priorities	Alloc. Com & Board	Annually	Done in fall 2009
		2. Evaluate applications against priorities	CRP, Board	At allocation time and via Emerging Needs Fund applications	Done, but no ranking by priority
		3. Hold meetings of partner & other agencies to identify and communicate new & emerging needs	Exec. Dir.	Annually/ Semi-annually	June 28
		4. Survey partner and non-partner agencies re emerging & ongoing needs	Exec. Dir.	Twice a year	Did in fall 2009, little response
B. Ensure application and process results in greatest possible community impact.					
		1. Incorporate feedback from CRP, agencies, Board	Exec. Dir.	Annually	Done
		2. Review and incorporate best practices of other United Ways for significant process revision	Exec. Dir., Alloc. Com.	Every three years.	Minor changes this year
		3. Identify specific targeted outcomes and strategies for each priority.	Exec. Dir, Alloc. Com, Board, Vision Councils,	Begin in 2010	Added some, but not from Vision Council process
C. Increase funding available for annual community investments					
		1. (see those under Goal 4 – Fund Development)			
		2.			
D. Meet Emerging Community Needs through EN Fund and other non-traditional funding streams and processes					
		1. Set aside 5% of allocations to allow for mid-year disbursement	Board	In allocation process annually	Done
		2. Use info from needs assessment and agency surveys to channel funds	Alloc. Com & Exec. Dir.	Fall – Winter, annually	Did in fall 2009
		3. Consider other funding streams/processes to support targeted initiatives	Alloc. Com, ED, Board	Begin in 2010	

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2. WORK COLLABORATIVELY TO SOLVE COMMUNITY PROBLEMS					
	A. Ensure accurate and updated info on community needs is available by actively participating in HSCB's community needs assessment process				
		1. Analyze & publicize 2008 data	HSCB, Exec. Dir.	Winter 2009	Done
		2. Update and review	HSCB, Exec. Dir.	Annually	
		3. Identify duplication & gaps	Exec. Dir., Alloc. Com., Board	Annually	
	B. Serve as active participant in relevant existing community meetings and partnerships				
		1. Identify meetings & partnerships that are consistent with our mission & vision	Exec. Dir.	Ongoing	Active in several
		2. Serve as active HSCB member	Exec. Dir.	Ongoing	Yes
		3. Serve as active member of relevant HSCB workgroups, e.g. Transportation, Pov. Red. Init.	Exec. Dir., A/PA, Board	Ongoing	Yes
	C. Ensure gaps in services are filled by initiating and facilitating partnerships and programs, as needed				
		1. Identify gaps, needing UW leadership	Board, Exec. Dir.	Annually	Safe Haven, Food Rescue,
		2. Bring together partners to address problems	Exec. Dir.	Annually at least	
		3. Encourage agencies to develop programming to fill gaps.	Exec. Dir.	Ongoing	
		4. Identify opportunities for UW funding	Exec. Dir., Board	Annually, or as needed	
	D. Enable community agencies to leverage additional resources to meet community needs by providing assistance and coordination (e.g. grants/grant writing, volunteers, collaboration)				
		1. Bring together partner agencies to share ideas & assess needs for capacity building	Exec. Dir., A/PA	annually	June 28, 2010
		2. Start Volunteer Connection – acquire software, promote volunteerism, engage agencies	Staff, SW intern, VISTA, other partners	Spring 09	Done
		3. Promote volunteerism, etc.	VISTA, intern, Staff	Summer 09 - ongoing	Done
		4. Continue to serve as fiduciary and co-coordinator for Project Connect	ED, A/PA	ongoing	Done
		5. Continue to coordinate Day of Caring.	A/PA, ED	ongoing	Done More

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		Evolve to more impactful program			impactful?
		6. Provide advice & technical assistance for partner agency fundraising	ED	ongoing	As requested
	E. Ensure resources are available to area residents (e.g. EITC, prescription discounts, public benefits, etc.)				
		1. Build support to implement 2-1-1. Continue to inform community of benefits. Seek funding, as opportunities arise	ED, Board, Workgroup	ongoing	Ongoing. Start-up funding secured. Need to promote/publicize.
		2. Encourage VITA programs to expand services – recruit volunteers, publicize to businesses, find other venues, publicize to public,	ED	Winter annually	Tried to. Not much change
		3. Serve as go-to place for info on community resources – E-news and website	ED, A/PA	ongoing	Sort of
		4. Continue to distribute and publicize Rx discount cards	ED, APA	ongoing	Yes, \$50,000 saved so far
3. PROVIDE A LOCAL VOICE FOR PUBLIC POLICY ISSUES CRITICAL TO HEALTH & HUMAN SERVICES					
	A. Staff and Board are knowledgeable about relevant public policy issues				
		1. Read UWA, MAUW, MLHS, Center for Michigan communications	Staff, share with board	ongoing	Martha scans, but rarely shares with Board.
		2. Evaluate possible issues for appropriate CEUW action	Board	As needed	
		3. Board review of public policy issues	Board	annually	
		4. Consider hosting public forum on critical national and/or statewide issues (Kettering Institute)	Board	Summer 09	Revised 5-2010
	B. Relevant parties (agencies, donors, government officials) are informed about issues and possible solutions				
		1. Maintain database of contacts	ED, A/PA	ongoing	Yes
		2. E-News	ED, A/PA	monthly	Names added continually. Include Advocacy Info

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		3. Letters to editors	ED, Board	As needed	Not as much as could
		4. Grassroots organizing	ED	As needed	Not much
		5. Contact elected & appointed officials	ED	As needed	Occasionally. PC DVDs mailed.
4. ENSURE SUFFICIENT FUNDS ARE AVAILABLE TO MEET ALL OTHER GOALS.					
	A. Increase Campaign a minimum of 10% each year to become a \$500,000 campaign by 2013/2014				Increased only 4% this year.
		1. Implement “best practices” identified from other successful campaigns.	Staff, Alloc. Com., Board	Ongoing	Some.
		2. Develop “Resorter” Campaign (see workplan)	Staff, Camp. Com., Board	Summer 09	Done but could do more.
		3. Begin Loaned Exec program – workplace campaign (see workplan)	Staff, Camp. Com., Board	Spring 09	Done
		4. Identify and engage Loyal Contributors (see workplan)	Staff, Board	Spring 09 and ongoing	Begun
		5. Continue to develop Leadership Circle (see workplan)	Staff, Camp. Com., Board	Ongoing	Done, more needed.
		6. Increase involvement of Board in campaign	ED, Board	Summer 09	Increased
		7. Increase campaign and other volunteer involvement, including active Campaign Chairs	Staff, Board	Spring – ongoing	More needed
		8. Small Business blitz	Staff	2010	Need to plan
		9. Increase e presence	Staff	ASAP	Facebook added.
		10. Make and distribute campaign video	Staff, volunteers	Summer	Done
		11. Consider special event w/ volunteer leadership	Staff, volunteers	Ongoing	Not done
	B. Support capacity building and special projects/initiatives with grants and other special support (\$10,000+ per year)				
		1. Procure a volunteer grant writer	Staff	As needed	
		2. Maintain relationship w/ Frey Foundation	Staff, Board	Ongoing	Done
		3. Seek out grant opportunities	Staff	As needed	Funding for 2-1-1 secured
		4. Consider special event w/ volunteer	Staff, volunteers	Ongoing	Not done

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		leadership			
	C. Provide administrative support by growing Endowment Funds				
		1. Designate all or portion of endowment fund for administration	Board	As fund grows	N/A
		2. Publicize existence of our funds	Staff	Ongoing	Not done
		3. Let financial planners know of opportunity	Staff	2010	Not done
		4. Solicitation to targeted donors (LoyCons, LC)	Staff	2011 or later	
5. ENSURE SUFFICIENT STAFF ARE AVAILABLE TO MEET ALL OTHER GOALS					
	A. Retain and recruit sufficient and appropriate staff				
		1. Assess staffing needs annually and/or when new programs are considered	Board	Annually	Expanded role of Admin/Program Asst.
		2. Provide staff with appropriate training opportunities	Board, ED	Ongoing	
		3. Evaluate compensation plan to ensure is adequate	Board, Pers. Com.	Every 2 years	
	B. Maintain current employee/office procedure manual to ensure smooth succession				
		1. Develop comprehensive manual	Staff	Fall 09	Most is done
		2. Review and update	Staff	Annually or when changes are made	
6. ENSURE SUFFICIENT BOARD AND OTHER VOLUNTEERS TO MEET ALL OTHER GOALS					
	A. Ensure Board reflects diversity of community and meets organizational skill needs				
		1. Nom Com assessment of haves and needs	Nom Com	Annually	Done
		2. Update recruitment materials	ED, Nom Com.	Spring	
		3. Publicize openings to donors, workplace CEOs	ED, Nom Com.	Spring, annually	Done in e-news

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	B. Ensure Board is well oriented, informed, engaged, and feels ownership of CEUW				
		1. Offer training opportunities through MAUW, UWA, community foundations, etc	ED forward to board	ongoing	Done
		2. Consider less frequent Board Meetings, with active committees in between	Board	2010	
		3. Consider increasing size of board	Board	Summer 2009	Done
	C. Ensure sufficient number and range of volunteers are involved in CEUW work				
		1. Implement Volunteer Connection	Staff	2009	Done
		2. Contact SCORE/retirees	Staff	Ongoing	Not done
		3. Engage students, as appropriate	Staff	Ongoing	
		4. Develop Emerging Leaders group	Staff	2009	Not done
		5. Develop meaningful roles for volunteers	Staff	Ongoing	Done, room for more
		6. Recognize and reward volunteers	A/PA	Nat Vol. Week & Breakfast	Done
		7. Increase use of Campaign volunteers and Loaned Execs	ED	2009 and ongoing	Done but room for more
		8. Develop placements for Interns, work-based learning program, students	ED	2009 and ongoing	Tried Intern, 2 VISTAS on board
7. HEIGHTEN POSTIVE COMMUNITY PERCEPTION OF CEUW					
	A. United Way is perceived to be an effective resource to address community issues				
		1. Develop ad hoc committee of other community leaders (Chamber, other service organizations) and survey once a year to determine public perception and recommendations	ED, A/PA	Aug 2009 and annually	
		2. Frequent pro-active news releases	“	Monthly	Done
		3. Use Constant Contact to survey donors, etc. for input	“	1 – 2x/year	March 2009
		4. Use electronic media to reach diverse segments: video, web, Facebook, etc.	“	Ongoing	Trying
		5. Survey partner agencies	“	Annually, agency meeting	

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		6. Distribute brochures via Chambers, etc.	“, Volunteer	Ongoing	Done
		7. Develop Marketing Committee for input	ED, volunteers	2010	June 2010
	B. United Way is perceived to be an effective resource to address community issues				
		1. Annual report describing community impact through effective programming	Staff	Summer 09 and annually	Community Impact report 2009
		2. Guest Commentaries describing specific efforts/impact	ED, Board	2 – 4x/year	
		3. Send printed newsletter to LC and CEOs	Staff	Spring 09 and 2 x/year	March 2009
		4. Contact with workplaces in non-campaign time, to thank and update them.	Board, loaned execs	Spring/summer	Tried CEO calls spring 2009
	C. United Way is perceived to be an organization you can be proud to donate to and be associated with.				
		1. Use local people in “Live United” and “I don’t just wear the shirt” ads, posters, videos	Staff, volunteers	Summer 09	Done