

UCP National

FY22 Tactics and Milestones

Tactic/Milestone Development

Approved by the Board of Trustees on January 10, 2022

Goal 1: UCP is recognized by all stakeholders as the premier provider of information for individuals with cerebral palsy and other disabilities.

Strategies with Tactics Supporting Goal Attainment

Strategy 1: Create processes to facilitate information transfer addressing healthcare, research, education, diversity, equity and inclusion, and technology across the affiliate network and the wider disability community.

Tactics/Accountability	Anticipated Milestones FY 22	Anticipated Milestones FYs 23-24
<ul style="list-style-type: none"> Identify known and reputable resources that provide vital information to Affiliates and the disability community (healthcare, research, education, diversity, equity and inclusion, and technology). <p>Staff: Armando, Anita, Michael, and James</p> <p>Board/Committee:</p>	<ul style="list-style-type: none"> Continuously update information with additional known and reputable resources and/or new digital technologies. Utilize internet, social media, podcasts, monthly and quarterly newsletters, press releases, brochures and other marketing collateral, website, and all available digital social media platforms to distribute relevant and timely information to stakeholders about UCP's role as the premier provider of information about cerebral palsy and other disabilities. 	<ul style="list-style-type: none"> Update information annually with additional known and reputable resources and/or new digital technologies. Assess the potential need for a full-time employee by Oct. 1, 2022 to coordinate distribution of information.

Goal 1: UCP is recognized by all stakeholders as the premier provider of information for individuals with cerebral palsy and other disabilities.

Strategies with Tactics Supporting Goal Attainment

Strategy 2: Promote fairs, conferences, discussions, and other events addressing issues such as treatments, accessibility, and assistive technology independently and through partnerships with other organizations.

Tactics/Accountability	Anticipated Milestones FY 22	Anticipated Milestones FYs 23-24
<ul style="list-style-type: none"> Develop events, conferences, etc., that promote health care issues that benefit the disability community and our affiliates. <p>Staff Lead: Anita, Michael & Armando Board/Committee:</p>	<ul style="list-style-type: none"> Healthcare and technology fairs that align with UCP's mission are prioritized and promoted. UCP's first annual National Conference for Latinos with Disabilities is organized by September 30, 2022. Information about mental health in the workplace is provided as a topic at a Town Hall meeting. A Virtual Town Hall includes a speaker addressing Diversity, Equity and Inclusion and its impact on the disability community and service providers. The board is notified of specific organizations and companies that partnered with UCP by the September 2022 Board Meeting. A report is produced on the outcomes of the fairs, conferences, town halls and panel discussion, etc. to the Board of Trustees by the September 2022 Board Meeting. 	<ul style="list-style-type: none"> Compile a list of potential events and partnerships to be developed by Sept. 30, 2023 . Identify a lead intern or staff person assigned to coordinate the aforementioned projects by September 30, 2023.

	<ul style="list-style-type: none">• More opportunities are created within the UCP affiliate portal to share information, policies, and best practices.	
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Goal 2: UCP's recognition and influence with national and state policymakers on disability issues are significantly enhanced.

Strategies with Tactics Supporting Goal Attainment

Strategy 1: Utilize the annual UCP/ANCOR Case for Inclusion report to share information, research and recommendations with policymakers, advocates and disability champions regarding the effectiveness of state Medicaid programs serving people with intellectual and developmental disabilities (IDDs).

Tactics/Accountability	Anticipated Milestones FY 22	Anticipated Milestones FYs 23-24
<ul style="list-style-type: none"> Produce, enhance and update the content provided by the annual UCP/ANCOR CFI report. <p>Staff Lead: Armando, James, Anita, Fernanda, and Sean Luechtefeld (ANCOR)</p> <p>Board/Committee: CFI Committee & Public Policy Committee</p>	<ul style="list-style-type: none"> The 2022 CFI Report is published online and in print by 3/31/22. An assessment of the 2022 CFI report is presented at the May 2022 Board of Trustees and MOC meetings. 	<ul style="list-style-type: none"> Identify additional CFI target audiences and distribution vehicles by October 1, 2022 for 2023 (e.g., Disability Policy Seminar).
<ul style="list-style-type: none"> Increase advocacy efforts with state and federal policymakers <p>Staff Lead: Armando, James, Anita, Fernanda, and Sean Luechtefeld (ANCOR)</p> <p>Board/Committee: CFI Committee & Public Policy Committee</p>	<ul style="list-style-type: none"> A webinar/panel discussion and presentation to news media of the report is facilitated to coincide with its publication. The audience for the FY 22 launch event, webinar, media promotion, congressional briefing and outreach to the affiliates via UCP's digital and traditional media platforms increases by 10% compared to 2021. 	

<ul style="list-style-type: none"> • Encourage policy change through feedback from affiliates, policymakers and the public about the need and impact of the CFI report. <p>Staff Lead: Armando, James, Anita, Fernanda, and Sean Luechtefeld (ANCOR)</p> <p>Board/Committee: CFI Committee & Public Policy Committee</p>	<ul style="list-style-type: none"> • A survey of UCP affiliates, ANCOR members, and the public is conducted within two weeks of publication to identify opportunities for improving the CFI. • An assessment of the 2022 CFI report is presented at the May 2022 Board of Trustees and MOC meetings. 	<ul style="list-style-type: none"> • Based on post-publication debriefing and survey, identify potential improvements for CFI report on or before October 1, 2022 for implementation in 2023. Process is replicated in FY 23.
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Goal 2: UCP's recognition and influence with national and state policymakers on disability issues are significantly enhanced.

Strategies with Tactics Supporting Goal Attainment

Strategy 2: Enhance the relevancy and awareness of UCP's public policy and advocacy agenda

Tactics/Accountability	Anticipated Milestones FY 22	Anticipated Milestones FYs 23-24
<ul style="list-style-type: none"> Cultivate and broaden relationships with local, state and federal policymakers and elected officials to advance and increase awareness of UCP's advocacy initiatives. <p>Staff Lead: Armando / James Board/Committee Lead: Public Policy Committee</p>	<ul style="list-style-type: none"> A general UCP policy agenda for FY 22 melding the core elements of the Public Policy Agenda for the 117th Congress and existing, agreed upon and planned advocacy priorities is formulated by the end of the third quarter. A draft of the UCP policy agenda is completed by the end of the second quarter of FY 22 for presentation to the Policy Committee in order to ultimately allow the Board of Trustees to consider and approve a final version of the FY 22 policy agenda by the end of the third quarter of FY 22. The UCP general policy agenda is promoted by distributing it via UCP's website, newsletter, LWL podcast, and all other digital and traditional media platforms; host national webinars, such as the Case for Inclusion congressional briefing; our Annual Meeting, Quarterly Affiliate Town Halls, participation in partner organization conferences and pertinent public policy discussions. The 2022 Case for Inclusion is incorporated in UCP's outreach to policymakers. At least two additional relationship-building meetings are facilitated with targeted federal 	<ul style="list-style-type: none"> UCP Affiliate input is shared with the national partners drafting the Public Policy Agenda for the 118th Congress on or before December 31, 2022. (Note, the Public Policy Agenda is developed bi-annually.) Formulate a general UCP policy agenda for FY 23 by the end of the fourth quarter that incorporates the elements of the Public Policy Agenda for the 118th Congress and existing and agreed upon advocacy priorities A two- or three- year engagement strategy with targeted US Senators and US Representatives (The Bipartisan Disabilities Caucus) is finalized by December 2022 relative to targeted legislators FY 23.

	<p>legislators and CP Collaborative members, the CP Foundation and others.</p> <ul style="list-style-type: none"> ● Reach out is undertaken to Rep. Dingell with regards to efforts tied to 14(c), SSI benefits upgrades, and other measures of interest to the disability community. 	
<ul style="list-style-type: none"> ● Enhance the utilization of FiscalNote <p>Staff Lead: Armando / James</p> <p>Board/Committee Lead: Public Policy Committee</p>	<ul style="list-style-type: none"> ● The potential of FiscalNote is maximized by hiring a consultant to collaborate with existing volunteer, staff and contract personnel to distribute and analyze state legislation of significance to the affiliates by the end of the first quarter of FY 22. ● National UCP staff, volunteers and/or contractors, as well as network affiliate leaders and personnel are engaged by the end first quarter of FY 22 through weekly reports and relationship engagement techniques. 	
<ul style="list-style-type: none"> ● Communicate government advocacy initiatives with UCP affiliates and encourage advocacy involvement <p>Staff Lead: Armando / James</p> <p>Board/Committee Lead: Public Policy Committee</p>	<ul style="list-style-type: none"> ● FiscalNote is utilized as a method of informing, engaging, and educating affiliates on government advocacy initiatives ● The UCP general policy agenda is promoted by distributing it to affiliates via the Members of the Corporation meeting and Quarterly Affiliate Town Halls 	

Goal 2: UCP's recognition and influence with national and state policymakers on disability issues are substantially enhanced.

Strategies with Tactics Supporting Goal Attainment

Strategy 3: Develop and establish collaborations with nonprofits, foundations, and private industry that support and advance UCP's mission (e.g., research, housing initiatives, employment training, education, and assistive technology).

Tactics/Accountability	Anticipated Milestones FY 22	Anticipated Milestones FYs 23-24
<ul style="list-style-type: none"> ● Increase engagement with UCP's current advocacy partners, such as The Arc, ANCOR, ACCSES. <p>Staff Lead: Armando Board/Committee: Public Policy Committee</p>	<ul style="list-style-type: none"> ● Continue relationship between UCP and The Arc in order to increase collaborative advocacy efforts in conjunction with The Arc's annual Disability Policy Seminar as demonstrated by positive attendance at events. ● Continue relationship between UCP and The Arc in order to increase collaborative advocacy efforts through the development of the FY23-FY24 Public Policy Agenda. 	<ul style="list-style-type: none"> ● Hire a full time Policy/Advocacy coordinator or dedicated consulting agency by October of 2022 in order to implement stepped up advocacy/lobbying efforts by FY23 ● Continue participation in the DPS planning committee meetings to enhance the participation of UCP at the Annual DPS. ● Continue with UCP and ANCOR to increase opportunities and advocacy collaborations through the co-publishing of the Case for Inclusion Report. ● Collaborative organizations are added and updated on an annual basis for future outreach.

	<ul style="list-style-type: none"> • Efforts to develop autonomous vehicles that are responsive to the needs and interests of people with disabilities are monitored and promoted. • The effectiveness of services provided by FiscalNote are evaluated by March 2022, then again by June 2022. • Collaborate in advocating for an increase of the SSI/SSDI income limits for people with disabilities through federal legislation through continued dialogue with at least 3 partners such as ACCSES, self advocate Archer Hadley and others, and the use of the CFI Report. 	
<ul style="list-style-type: none"> • Cultivate and identify new partnerships with national disability advocacy organizations, agencies, self-advocates, and the Affiliate Network. <p>Staff Lead: Armando</p> <p>Board/Committee: Public Policy Committee</p>	<ul style="list-style-type: none"> • At least two new, long-lasting partnerships with national advocacy organizations are identified and established by September 30, 2022. • An action plan is to promote equity, diversity and inclusion initiatives with regards to people with disabilities in communities of color is finalized and implemented. • A plan outlining additional relationship building action steps with the non-profits, foundations and private industry identified in FY 22 is finalized by May 30, 2022. • Opportunities to collaborate with CPARF are identified by July 2022. • An introductory meeting with CPARF with UCP Research Committee co-Chairs is facilitated by December 20, 2021. 	<ul style="list-style-type: none"> • Two to three-year action plans are finalized with new targeted advocacy partners by Oct 30, 2022. • Collaborative organizations are added and updated on an annual basis for future outreach. • Individual action plans are finalized for mission-related collaboration with at least two entities based on introductory meeting discussions by 2023. • Opportunities with CPARF for collaboration to be identified by July 2022. Introductory meeting with UCP Research Committee co-Chairs December 20, 2021.

Goal 3: Strategic relationships are forged to enhance and support UCP's mission.

Strategies with Tactics Supporting Goal Attainment

Strategy 1: Facilitate and promote opportunities for affiliates to collaborate

Tactics/Accountability	Anticipated Milestones FY 22	Anticipated Milestones FYs 23-24
<ul style="list-style-type: none"> Develop a strategy for growth of the affiliate network. <p>Staff Lead: Armando/Michael/Anita</p> <p>Board/Committee: Ad Hoc Strategic Planning Committee</p>	<ul style="list-style-type: none"> The Strategic Planning Committee is activated. A long-term growth plan for affiliate recruitment is developed. 	<ul style="list-style-type: none"> Participating in the Heckerling Conference is evaluated on an annual basis. UCP National to budget at least \$20K to participate in the Heckerling Conference on an annual basis. Invite affiliates to consider participating in the Heckerling Conference on an annual basis.
<ul style="list-style-type: none"> Identify and support new initiatives for Affiliates to collaborate in fulfilling their missions. <p>Staff Lead: Armando and Anita</p> <p>Board/Committee: Affiliate Services Committee</p>	<ul style="list-style-type: none"> Ideas for new collaborative ventures amongst affiliates during FY 22 RAC meetings are collected. Quarterly portal webinars are facilitated to enhance and increase engagement in the UCP portal. Information to Affiliates encouraging participation at the 2022 Heckerling Conference is sent in the 1st quarter of FY 2022. 	

Goal 4: New and enhanced methods are implemented to connect and share information and resources with affiliates.

Strategies with Tactics Supporting Goal Attainment

Strategy 1: Enhance the New Affiliate Portal

Tactics/Accountability	Anticipated Milestones FY 22	Anticipated Milestones FYs 23-24
<ul style="list-style-type: none"> Partner with UCP affiliates to enhance UCP's New Affiliate Portal <p>Staff Lead: Armando and UCP Team</p> <p>Board/Committee:</p>	<ul style="list-style-type: none"> An initial evaluation of UCP's new Portal is completed with the UCP National Team by March 30, 2022 A survey is administered during the third quarter of FY 22 to Affiliates querying their experiences with the new UCP Portal - focusing on usability, functionality and identifying any barriers to utilization. Opportunities are identified to implement feedback based on the FY22 survey to increase affiliate engagement. The new Portal enhancements are implemented by September 30, 2022. 	<ul style="list-style-type: none"> Yearly Portal evaluation surveys are administered to Affiliates in FYs 23-24. E-Forum/Affiliate Chat Room platform enhancements are made annually based on evaluation survey results. The New Portal enhancements are implemented on an annual basis.
<ul style="list-style-type: none"> Publicize the launch of new portal and educate Affiliates on its utilization <p>Staff Lead: Armando and UCP Team</p> <p>Board/Committee:</p>	<ul style="list-style-type: none"> The new portal awareness campaign including emails, RAC Meetings, Network News, and a Topical Call/or Virtual Town Hall is implemented by February 17, 2022. Quarterly training webinars targeting affiliate staff and addressing use of the new portal are facilitated quarterly. 	

Goal 4: New and enhanced methods are implemented to connect and share information and resources with affiliates.

Strategies with Tactics Supporting Goal Attainment

Strategy 2: Enhance the Annual Meeting and RAC Convenings

Tactics/Accountability	Anticipated Milestones FY 22	Anticipated Milestones FYs 23-24
<ul style="list-style-type: none"> Identify and implement enhancements to the 2023 UCP Annual Meeting. <p>Staff Lead: Armando and UCP Team Board/Committee:</p>	<ul style="list-style-type: none"> UCP FY 23 annual meeting enhancements are finalized and prioritized for implementation in the 4th quarter of FY 22. At least 3 partnerships are established (e.g., The Arc, ANCOR) to cultivate marketing initiatives promoting and growing awareness of the Annual Meeting for the disability community. A Post-Annual Meeting survey to gather feedback from attendees is administered within 45 days. Participation of the disability community at the 2022 Annual Meeting is increased by 20 percent. Processes and platforms to facilitate information transfer at the Annual Meeting and to the wider disability community are finalized and implemented. 	<ul style="list-style-type: none"> UCP annual meeting enhancements prioritized for 2023-2024 are implemented. Conduct a Post-Annual Meeting Survey to gather feedback from attendees to be distributed within 45 days Create processes to develop a hybrid version of the Annual Meeting for affiliates and the disability community. Create processes to develop a hybrid version of the Members of the Corporation Meeting.
<ul style="list-style-type: none"> Identify and implement enhancements to RAC convenings <p>Staff Lead: Armando/Anita Board/Committee: Affiliate Services Committee</p>	<ul style="list-style-type: none"> Discussions are facilitated at RAC meetings taking place in FY 22 focused on assessing the efficacy of UCP's annual meeting and enhancement opportunities for FY 23. An action plan is finalized and implemented to utilize the RAC Chairs more effectively to gather feedback from and engage with affiliates. 	<ul style="list-style-type: none"> RAC Convening enhancements prioritized for 2023-2024 are implemented.

	<ul style="list-style-type: none">• Processes and platforms are established to facilitate information transfer at the RAC meetings	
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Goal 4: New and enhanced methods are implemented to connect and share information and resources with affiliates.

Strategies with Tactics Supporting Goal Attainment

Strategy 3: Identify additional opportunities for Affiliates to attain resource funding.

Tactics/Accountability	Anticipated Milestones FY 22	Anticipated Milestones FYs 23-24
<ul style="list-style-type: none"> Identify, build and nurture relationships with organizations that may provide additional financial support to Affiliates. <p>Staff Lead: Armando/Michael</p> <p>Board/Committee:</p>	<ul style="list-style-type: none"> A plan is finalized and implemented to increase Affiliate participation in National's direct mail resource sharing campaigns to at least 15 Affiliates by September 30, 2022 A relationship-building plan is finalized and implemented to cultivate prospects for the 2022 Heckerling Conference, increasing planned giving opportunities for Affiliates and National. 	<ul style="list-style-type: none"> At least three foundations are selected as targets for grant opportunities by 10/15/22. Relationship-building plans pertaining to each targeted foundation are finalized by 06/30/23. An additional five Affiliates are recruited to participate in National's direct mail resource sharing campaigns by 10/1/23 An additional staff person is hired by 10/1/22 to implement new programs related to resource funding.

Goal 4: New and enhanced methods are implemented to connect and share information and resources to affiliates.

Strategies with Tactics Supporting Goal Attainment

Strategy 4: Enhancing development efforts that benefit affiliates.

Tactics/Accountability	Anticipated Milestones FY 22	Anticipated Milestones FYs 23-24
<ul style="list-style-type: none"> Secure support from current and targeted individual donors via direct mail campaigns resulting in at least \$74,452 in revenue. An additional \$8,000 will be raised for affiliate distribution (this amount is included in the “Pass Through” revenue line item) 	<ul style="list-style-type: none"> Four Direct Mail Campaigns, including at least two corporate sponsored campaigns, are conducted by September 30, 2022. 	<ul style="list-style-type: none"> Use Affiliate Portal to obtain stories and successes of affiliates to highlight in Direct Mail Quarterly newsletter updating donors of UCP National’s updates and accomplishments
<ul style="list-style-type: none"> Secure support from current and targeted giving strategies, such as individual donors, online giving, workplace giving, car donation program, and tribute gifts, resulting in at least \$161,700 in revenue. An additional \$29,000 will be raised for affiliate distribution (this amount is included in the “Pass Through” revenue line item) 	<ul style="list-style-type: none"> Promote UCP website and increase website traffic to maintain visibility of UCP as a donation platform by display of the website on marketing materials. Engage at least 8-10 lapsed individual major donors through direct ask, and cultivate active donors 	<ul style="list-style-type: none"> Review plan for promotion of the UCP website to increase donation platform/traffic Increase giving from active donors by 5%
<ul style="list-style-type: none"> Secure support from current and targeted institutions to result in at least \$46,684 in revenue An additional \$10,636 will be raised for affiliate distribution (this amount is included in the “Pass Through” revenue line item) 	<ul style="list-style-type: none"> Relationships are developed with 2 new potential corporate sponsors At least 3 previous corporate supporters are reengaged to support UCP 	<ul style="list-style-type: none"> Continue building relationships with past corporate sponsors
<ul style="list-style-type: none"> Secure support from current and targeted corporate sponsors for the in-person annual 	<ul style="list-style-type: none"> Relationships are cultivated with current and potential corporate sponsors to support the 	<ul style="list-style-type: none"> Re-establish relationship with past corporate sponsors (Ipsen)

<p>meeting to result in at least \$51,000 in revenue.</p> <p>Staff Lead: Armando/Michael</p> <p>Board/Committee:</p>	<p>Annual Meeting (example: Waymo, Kate Farms, Allergan/Abbvie)</p>	
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Goal 4: New and enhanced methods are implemented to connect and share information and resources to affiliates.

Strategies with Tactics Supporting Goal Attainment

Strategy 5: Enhance the Virtual Town Hall (VTH) meetings to share best practices in affiliate management (Please note: this strategy was updated to include the word “Enhance”)

Tactics/Accountability	Anticipated Milestones FY 22	Anticipated Milestones FYs 23-24
<ul style="list-style-type: none"> Identify opportunities to enhance the Quarterly Virtual Town Hall Video Conference Calls. <p>Staff Lead: Armando</p> <p>Board/Committee:</p>	<ul style="list-style-type: none"> Enhancement recommendations resulting from FY 21 survey feedback are implemented by September 30, 2022. Topic experts are identified and invited to quarterly town hall meetings. 	<ul style="list-style-type: none"> Enhancements are discussed and implemented on an annual basis.