



# STRATEGIC PLAN

## *FYE 21-FYE 27*

*Reviewed and approved by the Board of Directors*

*February 24, 2021*

**Vision Statement:** Working with the communities we serve, United Way of Eastern Maine is a trusted catalyst for meaningful and lasting change that improves the lives of people in our region.

**Mission Statement:** Improve the lives of people in Eastern Maine by mobilizing the caring power of people and communities.

**Bold Goals:**

Bold Goal #1: Meet basic needs and promote self-sufficiency for all

Bold Goal #2: Prevent, treat, and support recovery from Substance Use Disorder

Bold Goal #3: Ensure all children have quality early learning experiences

**Methodology:**

The goals within this plan were designed based on work over the past 18 months, incorporating the input of focus groups, donor surveys, consultant recommendations and contributions from the Board of Directors and UWEM staff along the way. Our plan is intentionally high level as we know that much can change over a five-year period. Our work will be driven by the five-year vision of each strategic priority and the corresponding goals therein managed through the process outlined in the Implementation section below.

**Strategic Priorities:**

1. Diversify & Grow Revenue (pg. 3-4)
2. Community Impact & Investment (pg. 5-6)
3. Communications & Engagement (pg. 7-8)
4. Operational Excellence (pg. 9-11)

**Implementation:**

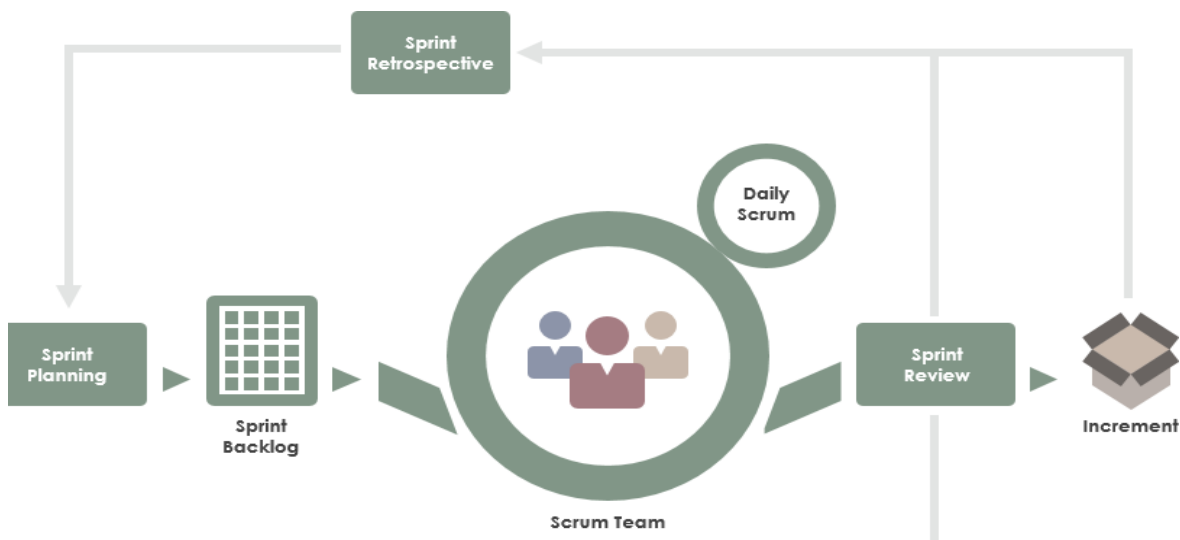
We will operationalize this plan through embracing the pillars of the **Modern United Way**. This evolving model is supported and regularly updated by United Way Worldwide. We know these best practices are resulting in increased revenues and impact at United Ways across the network. Management is committed to advancing the goals of each strategic priority in line with the Modern United Way and the specific goals outlined for each.



In line with our desire to create an agile and dynamic plan that evolves with the current environment and organizational needs we are adopting “sprints” to focus on the strategic priorities and goals over time. The sprint, a practice popular in the IT world and software development, is a set period of time during which specific work has to be completed and made ready for review. A sprint consists of a set of activities: sprint planning, daily stand-ups, development work, sprint review and sprint retrospective. A sprint is used to accomplish something – a sprint goal. The activities within the sprint are planned to do this and changes within the sprint that might jeopardize the sprint goal are avoided.



“The UWEM Sprint” will allow for cross pollination of ideas from team members; they will increase cross training and ownership of organizational priorities. The vision is that The UWEM Sprint will also increase leadership opportunities for members of the team and result in efficient planning, testing and implantation of new ideas in line with the Strategic Priority goals. Multiple UWEM Sprints will run concurrently with members overlapping as needed. The UWEM Sprint will result in ongoing action steps in line with the five-year goal period all moving toward the Strategic Priority goals outlined herein. An imperative of the UWEM Sprint is the recognition and celebration of the results as well as the retrospective at the end of each period.



**Strategic Priority 1:  
Diversify and Grow Revenue**

**Five Year Vision:** For 89 years UWEM has been leading our community toward monumental change. Our transparency, ability to mobilize quickly in response to immediate community needs while also creating long term change where it is needed most has solidified our stature in the community. Our focus on vetting the viability, performance and impact of our funded partners ensures that our donors are able to make the most impact with their charitable contributions.

We have a strong fundraising structure that includes volunteer, staff and data systems all linked and working together. To drive growth, we have embraced a best in class service orientation and digital strategy. We gather and use robust data on donor preferences and interactions to effectively manage relationships and meet expectations. Developing compelling content, tailoring communications and experiences for United Way supporters and delivering these consistently through personal interactions and digital platforms has been instrumental in our success.

We have effectively leveraged volunteers for peer-to-peer fundraising and establish strategies to steward individual donors and move them to the next level of giving. Our commitment to building relationships for the long term and communicating specifically about what they most care about will net increased results from individual donors, workplace campaigns, corporate donations, bequests, grants, sponsorships and more. Our diverse array of revenue sources contributes to the financial stability of the organization as a whole.

Strategic Priority 1: Diversify and Grow Revenue	
5 YEAR GOAL	5 YEAR METRIC
<p><b>Total revenue grows 5% year over year to advance the bold goals.</b></p> <ul style="list-style-type: none"> <li>○ Annual Campaign</li> <li>○ Grants</li> <li>○ Sponsorship</li> <li>○ In-kind</li> <li>○ Fee for service</li> <li>○ Endowment</li> </ul>	<ul style="list-style-type: none"> <li>● <u>Total Revenue</u> increased to \$2,317,728 (5% year over year)</li> <li>● Cornerstone campaigns increase by 15%</li> <li>● Reduce Donor Churn to 35%</li> <li>● Reduce Leaders’ Circle Churn to 20%</li> <li>● Increase Leaders’ Circle membership to 200</li> <li>● Increase Tocqueville Donors to 10</li> <li>● 30 (total) members Charles F Bragg II Society</li> <li>● \$70,000 in grants</li> <li>● X e-pledge campaigns</li> <li>● Implementation of workplace campaign and individual donor plans; track preferences and CSR priority issues in CRM</li> <li>● Increased foundation partnerships</li> <li>● Increased sponsorships and in kind support</li> </ul>

<p><b>Actively engage all staff and volunteers in relationship building and revenue generating efforts</b></p>	<ul style="list-style-type: none"> <li>• All staff actively engage and manage assigned campaign divisions</li> <li>• Increased ECM participation in UWEM trainings, events etc.</li> <li>• Thank you communications are administered within agreed upon timelines (post cards, letters, calls)</li> <li>• # Volunteer hours tied to revenue generation</li> <li>• #Volunteer asks/leads generated</li> <li>• Increase face to face donor visits to X</li> <li>• Campaign leadership succession complete 3 years in advance.</li> <li>• # training sessions conducted</li> <li>• Collective board giving increased to \$25,000 (2% year over year)</li> <li>• Maintain 100% staff and board giving</li> </ul>
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## Strategic Priority 2: Community Impact and Investment

**Five Year Vision:** We are the thought leader for community change and the “go to” phone call when there is a problem to be addressed. With our leadership strategies are being implemented at the local level that are advancing the Opportunity 2028 Bold Goals and engaging our stakeholders (donors, partner agencies, community members, leaders and legislators etc.) across our geography. We continually assess our community and are the recognized experts on the current needs.

We offer investment options to address a range of community issues as a catalyst for diverse segments to make financial contributions and to get involved. We utilize our knowledge of what the community cares about, aligned with corporate partner CSR goals, to develop a compelling community impact agenda of goals and effective Impact strategies. We continuously refresh and innovate impact solutions to improve relevancy. We strategically invest our resources in Community Investment, Innovation Fund grants and Special Allocations that advance the mission and goals. We strategically invest our staffing resources in the same manner. We attract funding to support initiatives through a variety of sources outside of the annual campaign. We track results and stories related to impact work to enhance donor communications and engagement efforts. Through these efforts we have achieved the bold vision of Opportunity 2028.

Strategic Priority 2: Community Impact and Investment	
5 YEAR GOAL	5 YEAR METRIC
<b>Increase understanding community needs through data and partnerships.</b>	<ul style="list-style-type: none"> <li>• Annual Community Impact Report complete by August 15<sup>th</sup> highlighting key community needs and impact results</li> <li>• Annual presentation of key needs and results to CIC and Board by October 1<sup>st</sup>.</li> <li>• Report to the Community complete by September 1<sup>st</sup></li> <li>• Needs Assessment implemented by FYE26</li> <li>• Review UWEM’s mission, vision, Bold Goals prioritization and communications per Assessment Results (FYE 27)</li> </ul>
<b>Lead organizations, individuals and volunteers to address priority community needs; increase capacity of partners to meet these needs.</b>	<ul style="list-style-type: none"> <li>• # collaboratives active as member</li> <li>• # collaboratives led</li> <li>• # of engagements on the online tool.</li> <li>• Partners report increased visibility, participation and support of UWEM in collaborative efforts.</li> <li>• #/% participants engaged in convening, trainings and peer 2 peer</li> </ul>
<b>Become a more effective and influential community investor to support Opportunity 2028 Bold Goals and priority community needs.</b>	<ul style="list-style-type: none"> <li>• Define funding philosophy and guidelines for Community Investment process; considering allocation per goal area and geography</li> </ul>

	<ul style="list-style-type: none"> <li>• Ensure 100% of funded programs are identified as high-quality according to UWEM standards and objectives.</li> <li>• 100% of funded programs meet agency agreement requirements and measure UWEM identified program indicators.</li> <li>• 85% demonstrate progress toward UWEM identified indicators at reporting intervals.</li> <li>• 75 volunteer reviewers recruited and trained.</li> <li>• Achieve 80% or higher positive feedback from applicants and volunteers on follow-up surveys.</li> <li>• Innovation Fund growth to \$X; Consistent budget for innovation fund annually.</li> </ul>
<p><b>Embrace donor desire to earmark giving to particular programs or causes by creating a compelling slate of investment opportunities for donors and potential donors.</b></p>	<ul style="list-style-type: none"> <li>• Develop major gift proposals for UWEM products.</li> <li>• Launch of fundraising effort tied key product(s) independent of annual campaign.</li> <li>• Align organizational resources to support priority initiative(s).</li> <li>• Increased funding for priority initiatives via budget process, special fundraising effort, grants or sponsorships.</li> <li>• All new endeavors will have a measurement plan established within 6 months of launch.</li> <li>• Increased volunteer support of priority initiatives</li> <li>• Every UWEM led or managed initiative has a CIC member, volunteer, agency partner or board member lead for engagement and stewardship.</li> </ul>

### Strategic Priority 3: Communications & Engagement

**Five Year Vision:** We are seen, heard and understood. Everyone in the community knows about United Way and the unique role we play in the nonprofit ecosystem. We meet people where they are and as a result we are seen as accessible and the community feels connected to our work.

We utilize the latest technologies in email marketing, website design, and social media alongside traditional media such as printed mailings, flyers, posters, and ads. We continue to leverage and grow our relationships with the media to reach more people. We use our marketing engine to promote not just our work and the work of our nonprofit partners, but also the work of our corporate partners as they strive to grow business and retain employees.

We deliver awesome experiences that directly engage individuals, corporations and organizations in the work of United Way through curated volunteer opportunities, drives and special events that connect people to the mission and results of UWEM. The actions of our affinity group network are tangibly advancing the Bold Goals. With our help, people feel connected to something much bigger than themselves.

Core to this vision, is remaining fresh and local. We will utilize the resources of United Way Worldwide, but be mindful of keeping the content local and relevant to our community. It's important that we continue to keep our content, design, and approach fresh in order to continue the momentum and not get lost in the overwhelm of information in today's society.

Strategic Priority 3: Communications & Engagement	
5 YEAR GOAL	5 YEAR METRIC
<p><b>Develop messaging that promotes UWEM as the charity of choice; Provide frequent, meaningful and targeted communication in line with messaging.</b></p>	<ul style="list-style-type: none"> <li>• Cohesive brand, look and feel in materials.</li> <li>• Annual messaging finalized by July 15<sup>th</sup></li> <li>• 100% of materials reflect consistent message.</li> <li>• Collateral materials printed/produced by September 1<sup>st</sup> annually.</li> <li>• Brand awareness survey baseline data by FEY24</li> <li>• Communication highlights UWEM goals, strategies, activities and results.</li> </ul>
<p><b>Provide consistent and meaningful opportunities to engage donors, volunteers, companies and community members in the mission of UWEM with best in class drives, volunteer experiences and events</b></p>	<ul style="list-style-type: none"> <li>• Annual engagement calendar (with a diverse set of entry points and opportunities for engagement)</li> <li>• X # drives</li> <li>• X# volunteers</li> <li>• X# volunteer hours</li> <li>• Event attendance increase by X%</li> <li>• # unique individuals engaged</li> <li>• # items collected (ex socks)</li> <li>• X# beneficiaries (agencies/individuals) of collections</li> </ul>



	<ul style="list-style-type: none"> <li>• Expand network of UWEM volunteers by 5%</li> <li>• Provide new service connections for a minimum of 15 corporate partners outside of the annual campaign.</li> <li>• Volunteers report meaningful experience and satisfaction 85% or greater.</li> </ul>
<p><b>Engage donors and volunteers beyond the workplace through a comprehensive digital strategy</b></p>	<ul style="list-style-type: none"> <li>• Increased effective email communications (click rate, conversions etc.)</li> <li>• Social media followers increase X% year over year</li> <li>• Increase media presence</li> <li>• # media stories/UWEM mentions in media</li> <li>• Website traffic; analytics</li> <li>• Increase use of online volunteer portal by 10%</li> </ul>
<p><b>Deepen our commitment to track and communicate the need, impact and results of Opportunity 2028 and real-time critical community needs.</b></p>	<ul style="list-style-type: none"> <li>• All mailings are sent on time according to the timeline</li> <li>• Formalized story process is consistently utilized</li> <li>• 100% of marketing data collected from partners is stored and accessed through one shared system.</li> <li>• Quickly fulfill media inquiries in line with priorities</li> <li>• Quarterly story pitch to media outlets</li> </ul>

## Strategic Priority 4: Operational Excellence

**Five Year Vision:** At UWEM our people are our biggest asset. We are focused on talent management, recruiting, hiring and retaining a diverse team with skills, competencies and values aligned with our purpose. We work together, as a team, and with the greater United Way network to enhance our effectiveness and results. We are constantly collaborating and working together to raise more money, solve problems and improve our systems.

Team members research new ideas and solutions and ask for help when necessary. We do not work in a silo but as a team; exceeding expectations, embracing the next challenge and excited for new possibilities. We utilize many different types of volunteers; including Board members, fundraising volunteers, advocates and volunteers whose skills are leveraged to work on community issues. Volunteers are a vital part of our work and help us scale our reach to our full potential. Staff are eager to cultivate, recruit and manage these volunteers. We value personal and professional development; providing staff and volunteers with the training and resources they need to remain up to date and relevant in this ever-changing landscape.

We embrace change, new technologies and processes that automate labor intensive, manual and repetitive processes whenever possible with an eye for system integrations and reduced opportunity for errors. Our strong foundation of rigorous financial analysis and integrated technology platforms enables UWEM to stay accountable, mitigate risk and build trust. It allows United Way to cost out multi-year strategies to drive community impact and build and track in real time the fundraising plans needed to raise funds from diverse revenue sources through digital and segmented strategies.

We are flexible and nimble in our approach to strategic allocation of resources, grant making, cost saving and creating efficiencies with the end goal of creating a stronger community. UWEM is a partner of, and model for, other United Ways in Maine and across the world. Above all we are mindful of our responsibility to our donors and our community.

Strategic Priority 4: Operational Excellence	
5 YEAR GOAL	5 YEAR METRIC
<b>Build capacity and redundancy that allows us to effectively leverage processes and technology to support our goals and priorities</b>	<ul style="list-style-type: none"> <li>• Migrate to electronic interfaces to eliminate duplication of or manual efforts</li> <li>• Increased utilization of technology by external stakeholders (ex. E-pledge, text to give, text to pledge, volunteerME)</li> </ul>

<p><b>Fostering a culture that is mission based, inclusive, high performing and flexible</b></p>	<ul style="list-style-type: none"> <li>• Assess salaries and benefits annually to stay competitive with others in the nonprofit space</li> <li>• 100% of new team members receive orientation.</li> <li>• New team members report 80% understanding of their role and responsibilities.</li> <li>• 100% of employees receive 90-day evaluation following hire</li> <li>• 100% of employees participate in annual self-evaluation and goal setting; all employees receive evaluation from supervisor.</li> <li>• 100% of employees have work plans that include expected performance indicators, accomplishments, metrics and development opportunities.</li> <li>• Annual assessment of staffing pattern and organizational priorities in line with budget process</li> </ul>
<p><b>Continue to amplify our impact by engaging the time and expertise of volunteers in all aspects of our mission.</b></p>	<ul style="list-style-type: none"> <li>• 100% of board members participate in orientation process</li> <li>• 100% of board members report understanding of roles and expectations following orientation</li> <li>• 100% of Board members active on, at least one UWEM committee.</li> <li>• 100% of board members meet attendance requirements</li> <li>• Board members report positive engagement with board meetings in follow up evaluation</li> <li>• Following educational sessions and orientation 80% of attendees report increased knowledge of their role, topic area and connect it to UWEM’s work.</li> <li>• 100% of UWEM volunteers will receive a “thank you” or some sort of recognition annually.</li> <li>• UWEM will honor key volunteers with awards at special events such as the kickoff, finale and annual meeting.</li> </ul>
<p><b>CRM Software is used to its maximum potential, enabling the organization and staff to focus on increased revenue, communications with our constituents and management of data.</b></p>	<ul style="list-style-type: none"> <li>• Formalized onboarding process related to CRM</li> <li>• 100% of staff provided with basic training on CRM upon hire</li> <li>• Quarterly and as needed CRM training sessions for all staff.</li> <li>• Better use of technology and data where each staff can efficiently access CSR for relevant &amp; accurate information</li> <li>• Establish proficiency assessment process/tool; 100% of staff report proficiency rating and ability to access accurate data.</li> <li>• Regular audits show 100% of staff complete correct updates and enter notes in CRM.</li> <li>• Transition to shared CRM or alternative CRM plan established.</li> </ul>

**Manage risk, investments, costs and revenue**

- Expense Ratio to 70%-75% Program
- Semi-Annual Strategic Plan update to staff and Board of Directors
- Shared service assessment complete; high revenue priorities identified
- Policy Software/tracking system implemented and consistently utilized
- 100% of policies and procedures reviewed and updated on time
- Annual UWW membership certification completed
- Develop and utilize cash flow projection model
- Develop 3 year budget projection model