



# Strategic Plan July 2016 – June 2018

United Way of Seneca County

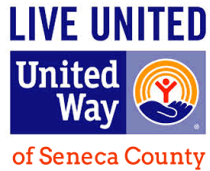
Strategic Plan 2016-2018  
(rev 2/2017)

Introduction: The United Way of Seneca County (UWSC) has had a long and proud history of being a supporter of service providers in Seneca County. UWSC was founded in 1958 but at that time the agency was known as the United Fund. The organization's purpose was to raise funds for other not for profits in a United effort and the agency primarily served northern Seneca County. Subsequently, the agency transitioned to the United Way of Seneca County. The name changed and the geographic scope of the agency was enlarged, but the primary mission of serving the community had not changed. The mission continued to be assisting in supporting the provision of services to those in need.

In the late 1990s, UWSC began its evolution from being primarily a collector and distributor of funds to community agencies to being a community change agent. UWSC, in conjunction with partner agencies, local, and county governmental agencies, initiated and depending upon the programs, funded county-wide programs. The aforementioned programs included, but were not limited to county-wide after school programs, the rural transportation initiative, the Ovid Community Health Center, Partners for Children and the Seneca County Substance Abuse Coalition.

UWSC continues to partner and support local agencies and community initiatives that make Seneca County a better place to live and to work. The annual campaign enables such partners as the Cayuga/Seneca Community Action Agency, American Red Cross of the Finger Lakes and the Seneca County House of Concern to meet their ever-increasing service demands while allowing UWSC to remain an advocate for our local community, a convener of ideas and talents and, most importantly, a change agent.

Needs Statement: The UWSC Board realizes the county demographics and economic base have dramatically changed over the years and has chosen to refine its current Strategic Plan. Furthermore, the need for programs and services has grown necessitating the need for increased collaboration among partner agencies and the UWSC Board, diversified funding sources and a clearly defined vision for the service providers and the Seneca County community. The Strategic Plan is dynamic and is reviewed at least quarterly to reflect the ever-changing character of our community and UWSC's role in Seneca County.



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Mission: To mobilize the caring power of our community to advance the common good by measurably improving lives.

Vision: For Seneca County to be a vital caring community that supports the building blocks for a good life that encompasses a quality education, a stable income, and good health.

Values: The six core values that provide the foundation on which UWSC bases its actions and decisions are: Integrity, Impact, Sustainability, Volunteerism, Inclusiveness and Catalytic Leadership.

Priority Areas:

1. Facilitate positive change for Seneca County communities by being a convener and change agent through the encouragement of increased communication and collaboration.
2. Align with UWW priority of community funding structured around program areas that include quality education, good health and stable income as well as aligning with funding priorities corresponding to the prioritization of current and future community needs with a positive impact.
3. Maximize efficiency and productivity through reviewed and improved organization, operations and Board Development.
4. Effectively develop resources for increased capacity and sustainability.

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Priority Area #1: Facilitate positive change for Seneca County communities by being a convener and change agent through encouragement of increased communication and collaboration.			
Strategic Goals	Actions	Person Responsible (lead in bold)	Evaluation Mechanism
1. Take the initiative to increase collaboration and remain an active member of community improvement discussions.	1a. UWSC will engage with community partners (including but not limited to county-wide governmental agencies, non-profit agencies, business groups, private citizens and partner agencies) to review and discuss the unique needs of Seneca County and identify where collaboration can improve our communities. (ongoing) 1b. UWSC, in collaboration with groups indicated in #1a, will identify and create a collaborative plan to address the needs identified. (beginning Fall 2017) 1c. UWSC, in collaboration with the groups indicated in #1a, will assist with the implementation of county-wide action plans as part of the Strategic Plan 2018-2020.	Executive Director, Community Partners and Contacts, Employees, Volunteers and Full Board.	Completed documents.
2. Engage younger community members in all geographic areas as well as demographics.	2. UWSC will increase the active involvement of youth in all appropriate programs while increasing collaboration with the 4 county school districts. (plan due Summer 2017)	<b>Executive Director</b> , Select Staff, School Personnel, Youth, Full Board.	
3. Collaborate beyond our traditional partners and historical givers; i.e. IDA, small businesses, Chamber & those served.	3. UWSC will identify new opportunities for partnership and support and increase outreach efforts to those identified (ongoing).	<b>Executive Director</b> , Full Board and all committees.	

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Priority Area #2:			
Align with UWW priority of community funding structured around program areas that include quality education, good health and stable income as well as aligning with funding priorities corresponding to the prioritization of current and future community needs with a positive impact.			
Strategic Goals	Actions	Person Responsible (lead in bold)	Evaluation Mechanism
1. Actively examine current and emerging community needs: Working with our partner agencies; Outside assessment; Internal assessment.	1a. UWSC will participate in county-wide efforts that align with Good Health, Quality Education and Stable Income as outlined in the Strategic Plan 2016-2018. (beginning Spring 2017). 1b. UWSC will research and collect current governmental, non-profit, and partner agency studies to evaluate community needs. In the event that an identified need is unmet by current efforts outlined in 1a, UWSC will convene the necessary partners to assess needs and address. (beginning Spring 2017)	1a.-1b. Executive Director, Employees and Volunteers, Full Board	Completed documents.
2. Develop a needs based approach-distribution process for funding.	2a. UWSC will review and modify the community investment process (begin 2017) 2b. UWSC will develop a community needs matrix to reflect #'s 1a and 1b to be used for the 2018/2019 Community Investment Cycle.	Executive Director, Select Staff, <b>CI Committee</b> , Full Board	
3. Maximize and measure community impact through funding and other forms of support.	3a. UWSC will begin to prioritize its community investment funding for 2017-18 predicated on #2 by June 2018. 3b. UWSC will develop an organizational report card and standards of outcome measurement around quality education, good health and financial stability. (2018-2019).	Executive Director, Select Staff, <b>CI Committee</b> , Full Board	

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<p>4. Maintain accountability to target populations, partner agencies, consumers, &amp; donors.</p> <p>5. Lead, support and seek funding to continue efforts to reduce the use and abuse of substances among youth, teens and young adults in Seneca County.</p>	<p>4a. UWSC will review, evaluate and modify the community investment process to reflect #3 annually beginning in 2017.</p> <p>5a. UWSC will continue to act as fiscal agent for the DFC grant including the accurate and timely submission of all required reports. (ongoing)</p> <p>5b. UWSC will collaborate with community partners to identify the primary needs of the community as relates to substance use and abuse through local surveys and other means of data collection. (ongoing)</p> <p>5c. UWSC will continue to work with the Seneca County Substance Abuse Coalition (SCSAC) to ensure its productivity and sustainability focusing on prevention and community level lasting impact.</p> <p>5d. UWSC will complete an application for Years 6-10. (due March 2018)</p>	<p>Executive Director,  Select Staff, CI  Committee, Full Board</p> <p><b>Grant Coordinator,</b>  Executive Director &amp;  select staff/volunteers</p> <p>5b-5c. <b>Grant Coordinator,</b>  Executive Director,  Community Partners  and SCSAC Members  representing specified  diverse sectors</p> <p><b>Grant Coordinator,</b>  Executive Director,  SCSAC</p>	<p>Federal Specifications including DFC-Me (due twice annually)</p> <p>Paid Consultant – Epiphany – Reach (due twice annually)</p> <p>Four Measures</p> <p>Youth and Adult Surveys</p> <p>Key Informant Interviews</p>
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<b>Priority Area #3:</b>		Maximize efficiency and productivity through reviewed and improved organization, operations, and Board Development	
<b>Strategic Goals</b>	<b>Actions</b>	<b>Person Responsible (lead in bold)</b>	<b>Evaluation Mechanism</b>
1. Follow 2016-2018 Strategic Plan.	1. UWSC Strategic Planning Committee will evaluate the implementation of the 2016-18 Strategic Plan on a quarterly basis commencing in April 2017.	Executive Director, <b>Strategic Planning Committee</b> and Full Board.	Completed documents.
2. Plan for Board members, staff, and volunteers succession.	2. UWSC will recommend a process for the succession and selection of Board members, staff members, and volunteers that reflect the demographics of Seneca County (to be completed by Fall 2017).	Executive Director, <b>Nominating &amp; Executive/Personnel Committees</b>	(2) Board Strengths & Needs Matrix
3. Develop Board, staff and volunteer development.	3a. UWSC Executive Director and UWSC staff will have an annual evaluation predicated on the position’s job description and annual goals. (Every June) 3b. Each Board member will complete an annual self-assessment. (Spring 2017 & each spring thereafter). 3c. UWSC will review Board and staff development models and recommend an appropriate model to the Board by December 2017.	<b>Executive Director, Executive/Personnel Committee</b> , Nominating Committee	
4. Regularly evaluate the UWSC current and future organizational structure to ensure long-term stability.	4a. UWSC will develop indicators of organizational health (completed Spring 2018). 4b. UWSC will evaluate against indicators and implement changes as needed (Spring 2018).	<b>Executive Director</b> and Full Board.	

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<b>Priority Area #4:</b> Effectively develop resources for increased capacity and sustainability			
<b>Strategic Goals</b>	<b>Actions</b>	<b>Person Responsible (lead in bold)</b>	<b>Evaluation Mechanism</b>
1. Maintain a financially sustainable organization that includes a diverse funding base.	1. UWSC will develop the 2017 annual campaign by examining and enhancing the traditional areas of contribution and identifying the means for expanding into geographic, demographic and donor areas. (September 2016 and ongoing).	Executive Director and <b>Campaign Planning Committee.</b>	Completed documents.
2. Explore and develop endowment funding and planned giving models.	2. UWSC will research the logistics associated with creating an endowment funding model as well as a planned giving and report the findings by Spring 2018.	Executive Director, <b>Finance/Planned Giving Committee</b> and Full Board.	(4) Approved Marketing Plan
3. Increase volunteer recruitment and retention of UWSC Board members and its partners.	3. UWSC will research models of volunteerism that will keep pace with the increasing needs of UWSC and its partners by Fall 2017.	<b>Executive Director</b> , Select Staff and Partner Agencies.	
4. Create a marketing approach that includes strategic messaging.	4a. UWSC will identify and evaluate current marketing efforts by Spring 2017. 4b. UWSC will research and recommend 3-4 key strategic messages by Spring 2017. 4c. UWSC will create and implement a formal Marketing Plan (beginning Fall 2017)	<b>Executive Director</b> , Marketing & PR Committee and Full Board.	
5. Identify and explore opportunities for collaborations with other United Ways	5. UWSC will identify and respond to ways to reduce operating costs, maintain services to the community and provide funding solutions (October 2016 & ongoing).	<b>Executive Director, Staff, Volunteers and Full Board</b>	