

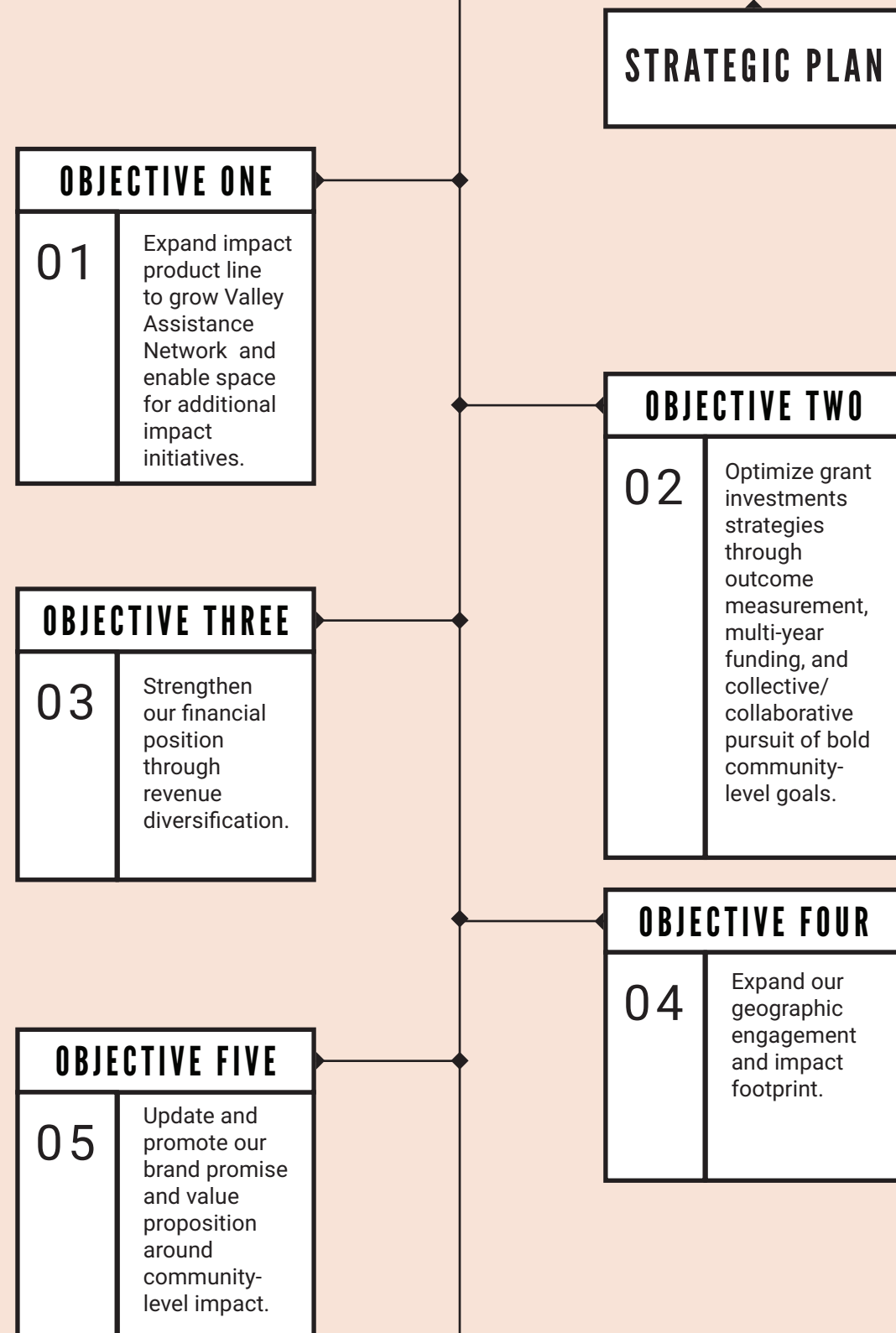
# STRATEGIC PLAN

2021-2026



United Way of Northern  
Shenandoah Valley





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## LOOKING BACK

For decades, United Way NSV has conducted community needs assessments and created strategic plans to pinpoint and address the most challenging issues Shenandoah Valley residents face. Based on the results, we focused resources on the priority health and human care needs that matter most to the people of our communities. The purpose of the model was to realize measurable community results in United Way's efforts.

## LOOKING CLOSER

In 2015, United Way of NSV conducted an extensive research project, The ALICE® Report, to pinpoint the most challenging issues residents were facing. While United Way and our partners have moved the needle regarding changing the lives of many individuals, some people were still falling through the cracks, earning too much to qualify for our funded programs. Others were living within our catchment area but still limited geographically to accessing our services. Therefore, we decided to do something about it.

## LOOKING FORWARD

Our new strategic plan which was adopted by the United Way NSV Board of Directors on September 21st, 2021, is a shift in how we approach enduring social problems. As our population changes, we must be ready to adapt. Our focus is centered on the ALICE® population, making sure no one falls through the cracks, as well as serving our entire region with wrap-around services that are centered in all of our communities.



### OUR MISSION

To increase the organized capacity of people to care for one another.

### OUR VISION

To be the leader in fostering powerful partnerships to impact the human care issues that matter most to the people of our community.

### OUR REGION

City of Winchester  
Clarke County  
Frederick County  
Page County  
Shenandoah County

**OUR STRATEGIC PLAN** defines our role in the Northern Shenandoah Valley and our responsibility as the steward of investments by donors – individuals, organizations and businesses.

**OUR OPERATING PLAN** which includes short-term and long-term goals, works in tandem with the Strategic Plan to ensure leadership and investments are aligned.

**STRATEGIES**

Strategy: Establish satellite VAN location in United Way's southern region.

01

Strategy: Establish a mobile VAN to serve rural communities and target businesses.

02

Strategy: Establish a VITA program.

03

Strategy: Explore additional impact product within with our focus areas.

04

**OBJECTIVE ONE**

1

Expand impact product line to grow Valley Assistance Network, and enable space for additional impact initiatives.

**01 STRATEGY ONE**

**OPERATING PLAN**

1. Establish a pilot program with the DASH grant
2. Hire a full time staff member in the southern region
3. Start serving clients and gathering outcomes
4. Establish a permanent working steering committee
5. Secure sustainable revenue streams
6. Establish a permanent location for co-locating partner agencies

**02 STRATEGY TWO**

**OPERATING PLAN**

1. Start "pop-up" VAN program with select employers to test outcomes and need
2. Based on results of "pop up" VAN program outcomes, secure a funding stream for additional staffing and physical resources

**03 STRATEGY THREE**

**OPERATING PLAN**

1. Pilot "My Free Taxes Program" to establish need and get information on available resources
2. Start a VITA Committee
3. Have a VITA Committee determine feasibility of the project, funding sources, timeline, etc.
4. Apply for a Federal VITA Grant
5. Start the first VITA Site

**04 STRATEGY FOUR**

**OPERATING PLAN**

1. Explore opportunities for partnerships and new impact products
2. Provide proposal of a potential new impact product
3. Implement new impact product (if approved by Board)
4. Provide proposal of potential second impact product
5. Implement second impact product (if approved by Board)

## STRATEGIES

Strategy: Deepen the needs assessment for more focused targets for strengthening the community.

01

Strategy: Establish a 3-tiered investment strategy focused on measuring impact: Phase-in greater outcomes accountability in our current allocations process over 2-3 years.

02

Strategy: Establish a 3-tiered Investment strategy focused on measuring impact: Establish *multi-year collaboration grants* directed at a small number of targeted needs identified by needs assessment and driven toward shared community goals.

03

Strategy: Establish a 3-tiered Investment strategy focused on measuring impact: Establish *micro-grants* to address immediate needs as appropriate and available.

04

## OBJECTIVE TWO

2

Optimize grant investments strategies through outcome measurement, multi-year funding, and collective/collaborative pursuit of bold community-level goals.

01

STRATEGY ONE

### OPERATING PLAN

1. Engage Community Impact Committee in selecting individuals to comprise steering committee for community needs assessment that drives planning and understanding of new vision and goals
2. Work with steering committee to collect needs assessment data, hold community forums and focus groups and analyze data, trends, and findings with key community leaders
3. Develop milestone with corresponding achievement metrics

02

STRATEGY TWO

### OPERATING PLAN

1. Purchase, implement and effectively utilize grant tracking software capabilities to increase reporting and data collection accountability and accuracy
2. Hold agency director meetings to notify agencies of grant changes and to allow for needed and/or necessary input
3. Establish a phase-out plan for the current grant program and a roll-out plan for the new grant program. Establish a timeline for each plan that clearly communicates the process, execution, deadlines, etc.

03

STRATEGY THREE

### OPERATING PLAN

1. Meet with focus groups of key community stakeholders and present research of successful *multi-year collaboration models*. Use other United Ways as examples for best practices and as a basis for the foundation of a new structure. Present multiple options and gather feedback on each option
2. Meet with Finance Committee to establish funding structure and plan for how to segregate funding to certain program initiative and how to ensure long term and multi year funding
3. Establish a grant model based on the research, finance committee recommendation, milestones and metrics identified in needs assessment. Present to Board and get Board approval
4. Notify partners, community members, and implement new funding structures/grant programs
5. Continually evaluate the process, get feedback and adjust as needed

04

STRATEGY FOUR

### OPERATING PLAN

1. Meet with focus groups of key community stakeholders and present research of successful *micro-grant models*. Use other United Ways as examples for best practices and as a basis for the foundation of a new structure. Present multiple options and gather feedback on each option
2. Meet with Finance Committee to establish funding structure and plan for how to segregate funding to certain program initiative and how to ensure long term and multi year funding
3. Establish a grant model based on the research, finance committee recommendation, milestones and metrics identified in needs assessment. Present to Board and get Board approval
4. Notify partners, community members, and implement new funding structures/grant programs
5. Continually evaluate the process, get feedback and adjust as needed

**STRATEGIES**

Strategy: Expand affinity giving and engagement.

01

Strategy: Pursue impact product grants.

02

Strategy: Establish planned giving program.

03

Strategy: Sharpen focus on individual/leadership giving.

04

**OBJECTIVE THREE**

3

Strengthen our financial position through revenue diversification.

**01 STRATEGY ONE**

**OPERATING PLAN**

1. Develop a Women United Leadership Council
2. Launch Women United program with launch event
3. Develop Women United program, guidelines, events, structure, and future strategic direction
4. Develop a stronger Society of Emerging Leaders leadership team with a clear succession plan that can run events, programs and plan for long term sustainability
5. Gauge interest in additional affinity groups
6. Expand affinity group engagement into Southern end of our service area

**03 STRATEGY THREE**

**OPERATING PLAN**

1. Develop better background knowledge of planned giving programs and opportunities
2. Identify key individuals to lead the planned giving effort
3. Develop a planned giving committee
4. Launch a program with a defined structure and established materials

**02 STRATEGY TWO**

**OPERATING PLAN**

1. Establish advancement committee with the goal of identifying and pursuing opportunities for funding that align with impact needs
2. Align identified gaps in community needs and services with community impact products
3. Work with the Community Impact Committee to continually assess the need for and feasibility of impact products
4. Continue to foster strong relationships with partners/projects and entities that can develop into viable impact products

**04 STRATEGY FOUR**

**OPERATING PLAN**

1. Research, and procure if necessary, data and donor management systems that helps track donor data in a more accurate and relationship focused way
2. Develop a communication/engagement calendar specifically targeted to individual/leadership donors that addresses specific initiatives and impact products of interest
3. Research methods other United Ways use to steward leadership donors
4. Reevaluate leadership donor event and thank you experience for donors

**STRATEGIES**

Strategy: Leverage VAN satellites as a catalyst for establishing and growing United Way connection and engagement in the southern region.

01

**OBJECTIVE FOUR**

4

Expand our geographic engagement and impact footprint.

01

**STRATEGY ONE**

***OPERATING PLAN***

1. Establish office location in Shenandoah or Page counties
2. Determine feasibility of additional staffing (beyond Valley Assistance Network)
3. Develop a plan to expand the United Way campaign activities, engagement activities, and affinity groups based on additional staffing resources over a two year period

**STRATEGIES**

Strategy: Develop a comprehensive brand messaging strategy/plan for educating and engaging both broad and segmented audiences.

01

02

Strategy: Deepen strategic volunteer engagement to create and multiply positive brand experiences.

**OBJECTIVE FIVE**

5

Update and promote our brand promise and value proposition around community-level impact.

01

**STRATEGY ONE**

*OPERATING PLAN*

1. Conduct focus groups and brand research to help inform a brand messaging strategy
2. Develop a brand messaging strategy/plan
3. Determine a plan for implementing the brand messaging strategy/plan and specifically how to segment and target specific audiences

02

**STRATEGY TWO**

*OPERATING PLAN*

1. Grow individual volunteer opportunities within affinity groups, leadership donors and workplace volunteers
2. Identify new volunteer roles to support VAN (like mentorship program, VAN On The Go, special projects, volunteers, VITA, etc.)
3. Research volunteer opportunity database
4. Build on Project Connect by growing current event in northern region - research feasibility of a second event in the northern region, based on demand and capacity
5. Develop Project Connect event in the southern region





**United Way of Northern  
Shenandoah Valley**

<b>UNITED WAY NSV</b>
STRATEGIC PLAN, 2021-2026