

# Strategic Plan 2010



United Way of  
Southwest Georgia

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1st Vice Chair of Board



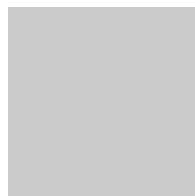
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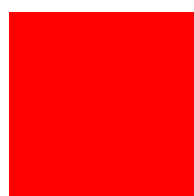
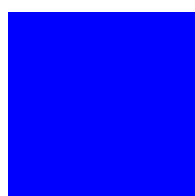
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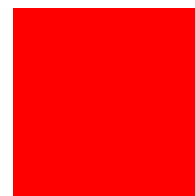
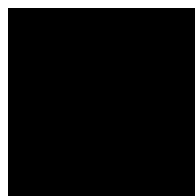
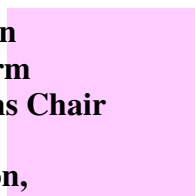
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Board Member



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Board Member

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**Lorenzo Keaton,**  
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**Dwayne Myles**  
United Way Staff  
President & CEO

Visit us at: [www.unitedwayswga.org](http://www.unitedwayswga.org)

**Our Mission:** To improve people's lives by mobilizing the caring power of communities in Southwest Georgia.

**V i s i o n: 2014**



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# Strategic Plan 2010

## Preface

Under United Way of Southwest Georgia's Board of Directors leadership, a Strategic Planning Committee was formed in June 2010. The charge of the committee was to complete the 2010 Strategic Plan (Vision 2014).

One common theme emerged. . . United Way of Southwest Georgia must change to address community needs. In 2000, the national office United Way Worldwide transformed to a community impact model that engages the community and measures outcomes. The change is vital for United Way's future in order:

- ◆ To proactively address the initial health and human service needs that exist in our community
- ◆ To increase unrestricted gifts for critical community needs
- ◆ To continue to be a financially viable and relevant organization in the community.

The good news is United Way of Southwest Georgia has been on a slow but steady path of change over the past two years. It is now time to accelerate speed, focus the direction, and work at a community level. United Way of Southwest Georgia will need to further focus on bringing people together to build effective community action.

The Strategic Planning Committee started by obtaining consensus of the board of directors regarding the case for change, mission, guiding principles, and purpose of the organization. This became the foundation of the plan.

## Background

United Way of Southwest Georgia (UWSWGA) has been working to improve lives in Southwest Georgia since 1940. For most of that time, UWSWGA operated primarily as a fundraiser, conducting an annual campaign and administering the allocation of funds to nonprofit agencies.

UWSWGA's Board of Directors approved this three-year strategic plan designed to replace the traditional model with a more "relationship-based" community impact model designed to measure community outcomes creating sustainable social change through collaborative efforts with others, including nonprofits, foundations, corporations, academia, individual donors, and volunteers. By repositioning UWSWGA as a leading force for positive social change in Southwest Georgia, the Board sought to address not just the symptoms, but the causes of some of Albany and Southwest Georgia's most difficult social problems. The Board adopted United Way Worldwide's identified Strategic Focus Areas (SFAs) Education, Income, Health and Basic Needs. The Board also set out to ensure broad agency and public understanding of and support for its strategic direction.

In 2008, United Way Worldwide (UWW) launched its “LIVE UNITED” initiative, helping re-define the global United Way brand around many of the core principles that UWSWGA embraced in our 2010 strategic plan. The national United Way agenda seeks to create meaningful national improvements in the areas of Education, Income and Health and urges local and regional United Ways to call for related improvements in their own market areas.

In Southwest Georgia, the impact of what many are now calling the “2008 Great Recession” permanently altered the local economy business base. Some of Albany’s bedrock industries relocated or closed business during this recession. Thousands lost their jobs, forcing many into foreclosure and burying countless others under mountains of debt.

The case for change embodies the critical thinking, informed opinion, and real world experience we have gained as an organization. The plan aligns with United Way’s national agenda by articulating meaningful, measurable and compelling targets for social change in Southwest Georgia in the areas of Education, Income, Health and continuing Basic Needs. By working to achieve these goals, UWSWGA will complete its transformation into a Community Impact organization that is widely recognized as a leading force for positive social change in Albany and Southwest Georgia.

Sincerely,

Jim Deal, Chairman  
Strategic Planning Committee

## **Our Mission**

To improve peoples' lives by mobilizing the caring power of communities in Southwest Georgia.

## **Our Vision**

To bring the diverse aspects of our community together to meet current health and human service needs and to proactively address future issues.

## **Our Values**

Always acting in integrity

Nurturing change

Encouraging innovation

Expecting the best in all we do

Building trust and teamwork

Developing our employees

## **Our Impact Areas of Focus**

### **Education:**

Preparing Children and Youth to Succeed

### **Income:**

Empowering Individuals and Families Towards Self-Sufficiency

### **Health:**

Promoting Health, Safety, and Wellness

### **Basic Needs:**

Responding to Essential services

# **A Case for Change:**

## **WHY DEVELOP A CASE FOR CHANGE:**

The Case for Change provides focus to our work. It provides the framework for improving the lives of participants of United Way-funded programs and of people affected by pressing community issues, whether they receive United Way-funded services or not. The Case for Change relies not only on the health and human services sector, but also on whatever sectors, systems, networks, groups, or environments that can play a role in improving lives in the community.

## **THE CHALLENGE:**

- Channeling money from workplace campaigns to agencies does not sufficiently address our communities' problems
- United Way's undesignated dollars continues to decrease

## **OUR COMMUNITIES ARE CHANGING:**

- More complex community needs
- Many agencies and coalitions working separately on related issues
- Problems can not be solved by one group alone...need for collective action, coordinated approaches

## **CHANGING MARKETPLACE CONDITIONS:**

- Competition for the charitable dollars is increasing
- More people working in smaller businesses
- Corporations restructuring and cutting back

## **TRADITIONAL ROLE NO LONGER DIFFERENTIATES US:**

- The "middle man" role, "one campaign for all" is no longer viewed as valuable
- Technology makes it easier to give directly
- Donors want more control and accountability
- Market share declining

## **CONTINUING CHANGE IS NOT OPTIONAL:**

- The UWSWGA's traditional model of raising and allocating money for the same historically funded agencies can not create sustainable community change alone
- Community problems continue to increase and are not getting resolved
- Unless revenue streams can be diversified, resources more focused and strategic, UWSWGA will become increasingly less relevant

## **THE OPPORTUNITY:**

- A leadership gap as well as a financial gap
- From fundraiser to community leaders

## **UWSWGA's Value to Investors:**

- Bring organizations, people and resources together to focus on critical issues
- Help achieve progress on community issues through collaborative, coordinated efforts.
- Fundraising becomes a strategy

## **A Case for Change: *cont.***

### **DESIRED OUTCOMES:**

- Perceived by business, community and political leaders, community investors and the public as a thought leader and force for change in the community
- Recognized for convening and participating with the broadest range of nonprofit, private, public and community groups to define and address the community's most pressing human issues.
- Valued and sought out as a partner and a source of information and expertise
- Widespread visibility, an engaging point of difference and clear results
- Align donor interests with strategies that work
- Create results that matter
- Sustain real community change that improves lives
- Determine root causes of community conditions and collaboratively address them

The transformation of United Way will fundamentally change the relationship between UWSWGA and the community. It will:

- Create a more meaningful impact on the community
- Enhance the capability of UWSWGA in resource development by creating specific "investment products" for donors: Education, Income, Health and Basic Needs
- Enhance the position and brand recognition of United Way in the community
- Provide supporters, donors and community leaders a more meaningful experience with UWSWGA

*The purpose of this document is to present information on why it is important for United Way of Southwest Georgia to change how it conducts business. This change is needed for United Way to become the premier community change agent through convening, facilitating and collaborating with organizations in the community to make a sustainable positive change in the lives of people in our community.*

# The Strategic Process

## What we asked ourselves

- What do we believe will be happening in the future that will affect the United Way?
- What do we want to be in future (in light of the changes that will be occurring)?
- How should we position the United Way of SWGA in the community?
- What must we do and how should we commit resources in order to achieve the desired position and results?

## Our Strategic Issues

### Allocations

- Ascertain accountability of outcomes
- Establish results to be measured

### Resource Development

- Adapt to change in donor base profile
- Solidify and expand base of support

### Human Resources

- Have staff/volunteer base to support continue growth
- Maintain quality of staff and volunteers
- Recruit and retain volunteers and staff that serve with commitment and integrity

### Marketing and Communications

- Establish recognition as the community problem solver
- Increase year-round visibility
- Create top-of-mind awareness as the best source for the donation dollar

## Our Strategic Questions

How do we become the driver of community change?

How do we better lives by addressing community needs?

How do we solidify and expand our base of support to address identified outcomes while creating year-round awareness of activities?

How do we recruit and maintain quality volunteers and staff ensuring that United Way is the best investment of the charitable dollar?

## Our Strategic Focus

In 2014, we will be different by:

- Assessing community needs and establishing community outcomes
- Developing solutions through increased and directed resources (staff, volunteers and dollars)
- Being a positive agent of change that supports programs with demonstrated outcomes
- Showing quality of life changes based on delivery of outcomes
- Having a diverse volunteer and donor base that represents the communities we serve

## Our Mission Principles

In 2014, we will:

- Be a positive agent of change supporting programs with demonstrated outcomes, proven intervention and collaboration
- Identify health and human care needs and establish accountable outcomes & benchmarks
- Engage a volunteer base that is vibrant, competent and diverse
- Be the agency of choice for community and individual contributions, providing a exceptional return on donor's charitable investment
- Aggressively and continuously expand donor base
- Provide year-round marketing using all forms of communication to highlight our impact on the community



# Strategic Goals: 2011 - 2014

## Strategic Goal #1:

The United Way will be viewed as the leader in solving health and human service needs of our community by:

- Identifying issues
- Establishing and funding desired outcomes
- Creating community initiatives
- Driving collaborative efforts

### Crisis Success Factor:

Establish and fund outcomes that meet community priority needs.

## Strategic Goal #2:

The United Way will be viewed as the leader in developing financial and human resources for health and human care programs that meet the needs of our community, expanding and diversifying the base of support by:

- Enhancing fundraising strategies
- Increasing the annual campaign
- Creating niche marketing
- Capitalizing on trends

### Critical Success Factors:

Have a well defined, multi-year fundraising plan with realistic goals that can be achieved through aggressive solicitation by volunteers, agencies, and staff.

Invest in, and align, human resources to meet organizational goals.

## Strategic Goal #3:

The United Way will be viewed as the leader in providing the best return for the community's charitable investment by:

- Increasing year-round marketing and visibility
- Communicating impact on the community

### Critical Success Factors:

Have year-round brand marketing and visibility that communicates established and delivered outcomes.

# COMMUNITY IMPACT FOCUS AREAS

## ADVANCING THE COMMON GOOD



### EDUCATION

Preparing Children and Youth  
to Succeed

- Reduce high school dropout rate
- Early Literacy
- Tutoring/Mentoring
- Parent Education and Support
- Teen Pregnancy
- Social/Emotional Development



### HEALTH

Improving people's health and  
wellness

- Access to Healthcare
- Early Detection and Treatment of Illnesses
- Preventive Healthcare
- Childhood Health and Wellness
- Nutrition
- Social & Emotional Health



### INCOME

Empowering Individuals & Families  
Towards Self-Sufficiency

- Poverty
- Earned Income Tax Credit
- Asset Development
- Individual Development
- Financial Education
- Credit Repair/Debt Reduction



### BASIC NEEDS

Responding to basic or critical  
needs

- Housing
- Food
- Clothing
- Transportation
- Disaster Relief
- Legal Services/Safety

**GIVE. ADVOCATE. VOLUNTEER.**

## Key Steps to IMPLEMENTING OUTCOME MANAGEMENT

### Setting Up - April 1, 2010 through June 30, 2010

- Step 1:** Align existing funded programs under appropriate categories  
*UWSWGA Staff and Impact Solution Team*
- Step 2:** Determine how impact info should be gathered, and from whom  
*UWSWGA Staff, Impact Solution Team and Impact Outcome Panel*

### Deciding What and How to Measure - July 1, 2010 through December 31, 2010

- Step 3:** Identify the program's mission, objectives and clients  
*UWSWGA Staff*
- Step 4:** Identify the outcomes (results) sought by the program  
*UWSWGA Staff*
- Step 5:** Select specific indicators to measure the outcomes  
*UWSWGA Staff and Impact Outcome Panel*
- Step 6:** Select data sources and data collection procedures for each indicator  
*UWSWGA Staff and Impact Outcome Panel*
- Step 7:** Identify key client and service characteristics to be linked to the outcome info  
*UWSWGA Staff*
- Step 8:** Pilot test the procedures, make needed modifications and implement  
*UWSWGA Staff*

### Analyzing the Assessment Tools - January 1, 2011 through March 30, 2011

- Step 9:** Examine the outcome assessments  
*UWSWGA Staff*
- Step 10:** Report the assessments  
*UWSWGA Staff, Impact Solution Team, Impact Outcome Panel and Board*
- Step 11:** Communicate outcomes and assessment to agencies and community  
*UWSWGA Staff and Impact Outcome Panel*

### Using the Data Results - April 1, 2011 through June 30, 2011

- Step 12;** Use the outcome info to improve benchmarks, outcomes and services  
*UWSWGA Staff and Impact Outcome Panel*

# Strategic Focus Areas (EIHB)

## Impact Solution Teams

The charge of the Impact Solution Team is to develop a process for the successful implementation of Strategic Focus Areas which will guide the organization's collaboration, partnership, and fund distribution activities.



### EDUCATION

Preparing Children and Youth to Succeed

RACHELLE SCOTT, Chair  
Procter & Gamble

[ 15 members ]

### INCOME

Empowering Individuals & Families Towards Self-Sufficiency

DAN MCCARTHY, Chair  
Albany Housing Authority

[ 15 members ]

### HEALTH

Improving people's health and wellness

Brad Hallford, Chair  
Phoebe Putney Hospital

[ 15 members ]

### BASIC NEEDS

Responding to basic or critical needs

ALFRED LOTT, Chair  
City of Albany

[ 15 members ]



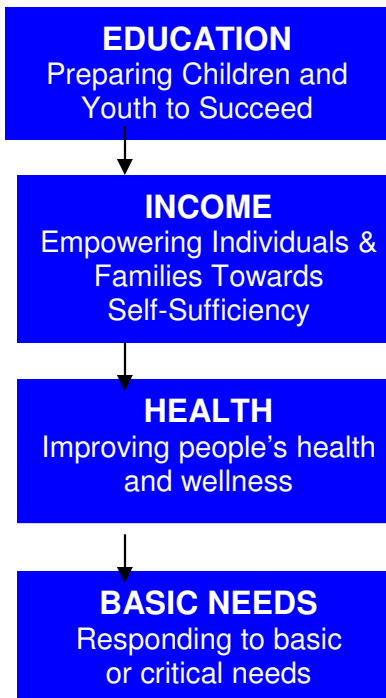
**GIVE. ADVOCATE. VOLUNTEER.**

# Impact Outcome Panel

The charge is to develop a plan for ongoing communications with agencies to address their concerns regarding implementation of strategic focus areas and their impact on the future of the Community Impact Fund, agency membership, campaign practices, resource development, and communications. Also, to identify opportunities for generating new dollars through traditional and non-traditional fundraising channels. Develop and review agency agreements, policy and procedures, criteria and making sure we stay the course of community impact.

## Impact Solution Team Chairs (4)

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## 2010 Strategic Planning Committee Chair (1)

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## Community Partners (2)

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Funded Program

Non –Funded Program



**GIVE. ADVOCATE. VOLUNTEER.**