Contents

Planning Process Overview

Goals for Planning

Before the strategic planning process began, the board and staff of the United Way of Bristol identified three different overall goals for the process. Those goals focused both on the areas in which the United Way of Bristol sought clarification of its future vision and also on changes and improvements that were needed in its processes and resources in order to realize that future vision.

Identify desired impact

The United Way of Bristol has a very broad mission. That mission is to bring together resources to help people in our community live healthy, productive lives. The broad nature of the mission presents great opportunity, but it also presents distinct challenges. One of those challenges is to be able to focus limited resources in the specific areas where the organization can best serve at any given time. Another challenge is to be able to adequately communicate to the community how that mission shapes and relates to the ongoing activities of the organization. A final challenge is for the Board of Directors to be able to make organizational decisions that properly consider the expectations of donors, partners, and other stakeholders. The planning process hopes to be able to gather information to allow the Board to be able to identify specific areas on which United Way can focus over the next few years.

Identify potential new services to offer

Although the impacts that United Way of Bristol strives to achieve may be consistent over the years, as the needs and resources in the community change, United Way must consistently look to consider new services that may allow it to better deliver that impact. Much of the planning process was spent identifying potential services that may be added, and then evaluating those services against the need in the community, the presence or absence of similar services, and the resources and strengths of United Way. In addition, United Way also considered those services in the context both of building or expanding the service as a program specific to United Way or one in which United Way would play a more limited role as a community partner with other organizations or supporter of another organization's program

Identify ways to improve results for existing services

Another aspect of the strategic planning process is to evaluate continuing services in order to identify opportunities for improvement. Those evaluations focused on determining the ways that each service is seeking to contribute to United Way's desired impact, and to further identify processes and resources that can be changed in order to deliver improved results.

Activities

The majority of the strategic planning process took place over a six-month period between January and July of 2016. During that time period, the Strategic Planning Committee engaged in various planning activities that were designed to gather as extensive feedback as possible from various stakeholders and then to utilize that information to meet each of the planning goals. Those strategic planning activities included:

- Surveys of United Way staff, current and past board members, and volunteers
- Surveys of key donors and member agencies
- Brainstorming sessions with the Executive Committee
- Forums with small groups from the United Way board
- Individual interviews with board members and community members
- Forum with representatives from member agencies
- Meetings and phone conversations with United Ways inside and outside of our area

An Ongoing Process

For strategic planning to be effective, the organization must be able to reap material results which help it move closer to having the impact that the stakeholders desire. Those results cannot be fully accomplished with a single engagement, nor can the plan for achieving those results be fully encapsulated in a single document. Instead, the planning process itself must set in motion the necessary activities for the organization to develop or strengthen a culture of continual improvement. The initial planning process and the plan document were designed to accomplish exactly that. Through this process the board and staff of the United Way of Bristol have reaffirmed a commitment to a culture of examination and improvement. The United Way of Bristol believes that in order to most effectively serve the local community it must consistently assess its current position, implement new resources and processes that will strengthen existing programs, and discover and evaluate new programs and services that might benefit its constituency. For that reason, this document should be seen simply as a summary of the first steps of a process that will continue on in the months and years to come.

Planning Considerations

Current Needs and Future Risks to Address

The United Way of Bristol seeks to consistently recognize internal and external factors which can lead to opportunities for improvement or threats to sustained future performance. This strategic plan has been built with consideration of current factors which the Board and staff have identified as having significant impact on United Way of Bristol's operating environment and future needs. These factors include internal needs specific to United Way of Bristol itself, as well as broader needs of the community of Bristol and of United Way Worldwide.

United Way

United Way Worldwide has built a recognizable and respected brand and operational model that serve as a valuable support structure to each of its local chapters. That support structure has led

to significant impact both at a national level and in the specific communities in which the chapters serve. While that support structure continues to be very effective today, there have nonetheless been a number of challenges that have arisen over the last several years. Those challenges include:

1. Lack of understanding in the critical role that United Way can play in directing funds to programs that have the best opportunity for long-term impact
2. Changes in giving preferences that align less with the traditional United Way campaign model than in the past
3. A devaluation in the perceived value of United Way to individual charitable organizations due to increased opportunity for direct connections to potential donors, volunteers, and advocates

Local Community

The community of Bristol, including the cities of Bristol, TN and Bristol, VA, along with the surrounding areas, is part of a local region that is anchored by Bristol, Kingsport, and Johnson City. While each of the anchor cities has its own identifiable community, each is also significantly affected by trends and changes in the larger region. The following trends in the community of Bristol and the Tri-Cities region as a whole are significantly impacting the ability of United Way and other local agencies to effectively serve the community:

1. The loss in recent years of several significant employers, leading to the loss of key funding sources for local not-for-profit organizations, as well as broader economic challenges which have increased the demand for services from many of those same organizations
2. Lack of an adequate charitable support structure to allow for optimal collaboration between different entities to address community needs as efficiently as possible
3. Limited understanding in the community of current needs and programs in operation

United Way of Bristol

In addition to the broader challenges affecting the community and umbrella structures within which United Way of Bristol operates, there are also several more specific challenges that have affected the United Way of Bristol's ability to realize its mission.

1. Decreases in corporate funding due to the loss of key companies and the redirection of employee gifts to other charitable organizations
2. Lack of awareness of the role of United Way of Bristol in supporting charitable programs in ways other than through the annual campaign
3. Misunderstanding of the relationship between United Way of Bristol and its member agencies and other local not-for-profit organizations
4. Annual campaign processes which have not incorporated new technologies and adapted to changing giving preferences to the same degree as some other charitable fundraising

Strengths and Resources to utilize

While there are several challenges to address in the strategic plan, the United Way of Bristol also has several key strengths and resources which it can utilize. The following assets have been

identified for their potential to play a key role in identifying and shaping specific activities that can help it move toward its overall vision:

1. Strong relationships with member agencies
2. Strong name recognition in community
3. A large, active Board which offers significant professional expertise and valuable connections and resources

United Way of Bristol Vision

Desired Impact

The United Way of Bristol is seeking to accomplish its mission by having a positive impact on its community, as evidenced by three specific long-term objectives.

1. Increase the resources and funds available to worthy charitable organizations in the Bristol community
    a. Raise awareness among potential donors of the needs that exist in our community
    b. Raise awareness among potential donors of how charitable organizations are striving to meet the needs
    c. Communicate to potential donors which organizations meet standards of stewardship and effectiveness
2. Help ensure that the necessary programs exist to meet the needs in our community
    a. Assess and communicate the specific resources available in the community
    b. Provide direct services and programs if and where necessary
    c. Assist with the formation of new programs and organization if and where necessary
3. Help existing programs and services have the strongest potential impact
    a. Promote a shared understanding of programs and services in the community
    b. Ensure that potential recipients can get to the programs they need
    c. Support coordination

Vision Goals

While not all aspects of the desired impact can be reflected in tangible benchmarks or goals, the following Vision Goals have been selected as key indicators of the overall success of the United Way of Bristol. Although achieving one or more of these goals will not necessarily be a complete indicator of success, consistent focus on growth toward them should play a pivotal role in keeping the organization focused and aware.

Goal 1: To be able to pass on 100% of funds collected through campaign to agencies

Goal 2: To provide an opportunity for all companies and employed or retired individuals in the Bristol area to make an informed and convenient contribution United Way and/or to local agencies

Goal 3: To become the primary information and advocacy resource and a leader in a community-wide movement that addresses the most pressing social needs within the Bristol VA/TN service area.

Independent Services Provided (both current and proposed)

While there are many needs in the community and opportunities for the United Way of Bristol to harness its resources in response to them, it almost must identify a limited number of services as key aspects of the vision on which to prioritize its resources and energy. Since it already has several successful programs in place, some of those envisioned services will simply be the continuation of existing programs and others will be new programs to be developed in the near future. While United Way of Bristol will play a key role in each of those services, it will also take on varying degrees of leadership and seek out different levels of partnership from other organizations. The following three services are those in which it is expected that United Way of Bristol will be responsible for providing all or almost all of the resources and leadership for development and execution.

Service 1: Raise funds for local agencies and programs

Objectives:

1. Provide an easy opportunity for individual and corporate donors to give
2. Communicate to potential donors how their contributions will benefit the community
3. Collect and administer the funds as efficiently and effectively as possible
4. Ensure undesignated funds are directed to the recipients who can best utilize the funds

Service 2: Conduct annual evaluations of local agencies

Objectives:

1. Effectively assess the internal practices and resources of agencies
2. Provide terms for accountability and support by agencies
3. Provide assurance to potential donors of the stewardship of their contributions

Service 3: Serve as a backbone agency to support collective impact

Objectives:

1. Align the strategies of area organizations to better complement each other and prioritize opportunities for greatest impact
2. Create a shared definition and measurements for success
3. Engage the community as a whole in productive and impactful activities

Collaborative Services Provided (both current and proposed)

In addition to the above programs, the United Way of Bristol is also focused on supporting the development of coalitions of complementary organizations to address opportunities for impact in the community. The programs below will depend on the successful engagement of those organizations in development and execution.

Service 4: Support the development of new programs for unmet needs in area

Objectives:

1. Develop and maintain understanding of community practices that can support positive long-term impact
2. Identify addressable needs in community that are not adequately being met by existing programs
3. Bring together community organizations and resources to create sustainable programs

Service 5: Provide a hub for resources and communication for area not-for profits

Objectives:

1. Help reduce duplication of time and resources in gathering information
2. Provide access to resources and support which agencies could not afford independently
3. Help agencies better focus their programs and objectives on the ideal needs

Service 6: Develop a program to connect potential volunteers with agencies where they could serve

Objectives:

1. Encourage more individuals to get personally involved with local nonprofits
2. Help reduce duplication of current volunteer recruitment efforts
3. Connect willing volunteers with the specific opportunities that fit their skills and interests best

Service 7: Offer educational and training opportunities for local agencies

Objectives:

1. Strengthen inter-agency awareness and collaboration

2. Help agencies implement internal processes that support their mission and good business practices
3. Support practices that will have lasting impact and address community needs

Service 8: Provide a single point of contact for those in need to connect to the ideal service

Objectives:

1. Communicate to potential recipients the services that are available to them
2. Provide the appropriate level of support to assist individuals in reaching the need necessary

Services to Consider for the Future

1. Provide Administrative staffing and resources to be shared among smaller agencies
2. Centralized data management
3. Incubator to help new not-for-profit organizations grow

Capabilities, Resources, and Processes (both current and recommended)

1. **Board/Governance**
   a. **Capabilities**
      i. **Legal Compliance** – comply with all federal and state regulations governing corporations and charitable organizations operating in Tennessee and in Virginia
      ii. **Strategic Planning** – maintain a clear and shared understanding among the board, staff, and key stakeholders of what the organization needs to accomplish and the steps that it needs to take to be successful
      iii. **Board Development –** maintain a Board of qualified and engaged individuals with the professional expertise, practical experience, and information necessary to make informed decisions to guide the organization

      iv. **Board Management –** provide the structure and oversight necessary to ensure that the Board stays engaged in all necessary aspects of the organization, continues to improve and hold itself accountable, and clearly delineates Board and staff responsibilities

  b. **Processes and Resources**
      i. Regularly held Board meetings that are well attended and in which there is good and clear discussion of all important matters to be addresses by the Board
      ii. Consistent development and execution of full strategic plans, supported by regular, ongoing continual improvement activity
      iii. Consistent Board evaluation by Board members and staff
      iv. Well-written and consistently followed organizational bylaws
      v. Formal evaluation process for all potential board members, followed by onboarding/mentoring process once they join

2. **Resource Management**
  a. **Capabilities**
      i. **Information Technology –** support the operational needs of the organization while protecting against liability
      ii. **Fixed Assets** – cost-effectively support the programs and administration of the organization
      iii. **Intangible Assets –** maintain the reputation and connections necessary to be able to effectively operate and serve in the community
      iv. **Information –** provide information for Board and staff to make strategic decisions that allow it to best utilize its strengths and resources to serve the community

  b. **Processes and Resources**
      i. Computers and peripheral equipment able to support efficient staff operations
      ii. Secure network and processes to protect against data loss and theft
      iii. Well-maintained building and grounds with sufficient space for staff, Board functions, and community and agency meetings
      iv. Strong partner relationships with area nonprofits, governmental agencies, and business professionals
      v. Consistent assessment and analysis of community needs and resources
      vi. Comprehensive understanding of programs and services in community
      vii. Access to IT and data security expertise

3. **Human Resources**
  a. **Capabilities**

       i. **Staffing** – Build and manage a team of qualified individuals that have the experience and opportunity to be able to carry out the programs and administrative functions necessary

      ii. **Volunteers –** Support the staff by utilizing interns and volunteers when possible

     iii. **Administration –** Meet all employment obligations of the organization without incurring liability or unnecessary expense

  b. **Processes and Resources**

       i. Staff of at least four full-time employees or equivalents

      ii. Regular recruitment and utilization of interns and volunteers to support staff

     iii. Current and thoroughly reviewed employee handbook and policies

     iv. Consistent employee evaluation process

      v. Access to Employment law and Human Resources practices expertise

4. **Marketing/Public Relations**

  a. **Capabilities**

       i. **Donor Relations** – maintain strong relationships with donors who clearly understand the mission and programs of United Way

      ii. **Partner Relations -** maintain strong relationships with donors who clearly understand the mission and programs of United Way

     iii. **Community Relations** – connect with the intended recipients of services and maintain a strong brand in the community

  b. **Processes and Resources**

       i. Campaign materials that clearly communicate United Way's mission and programs of supported agencies

      ii. Consistent utilization of multiple social media channels throughout the year

     iii. Relevant and easy to navigate website

     iv. Access to graphic design, media, and creative services expertise

5. **Finance**

  a. **Capabilities**

       i. **Fundraising** – raise the funds necessary to be able to support annual operations and long-term growth

      ii. **Financial Management –** meet all practical and legal obligations for financial management while maximizing the stewardship of our assets

     iii. **Financial Reporting** – communicate clear information to the Board and staff to allow for strong decision-making

  b. **Processes and Resources**

       i. Endowment fund with sufficient capital to generate the necessary revenue to sustain administrative and supporting functions and resources

      ii. Endowment committee and infrastructure to legally manage funds

     iii. Annual operating funds of at least $400,000, indexed to 2016

    iv. Clear reserve policy and budgeting process
    v. Access to accounting and financial management expertise
 6. **Risk Management**
  a. **Capabilities**
   i. **Insurance –** procure affordable insurance coverage to provide financial protection in event of liability or loss of assets
   ii. **Safety –** minimize the likelihood of damage to physical assets or bodily injury to individuals
   iii. **Disaster Planning** – minimize the financial and operational impact that a natural disaster and/or equipment failure would have on United Way
  b. **Processes and Resources**
   i. Comprehensive insurance coverage to protect from financial loss or liability related to physical assets
   ii. Comprehensive insurance coverage to protect Director's and staff from personal liability related to operations
   iii. Comprehensive insurance coverage to protect United Way from corporate liability for operations and fiduciary duty
   iv. Written and understood disaster plan that addresses most likely and most severe disaster that could impact United Way
   v. Written safety plan and procedures, supported by necessary safety equipment
   vi. Consistent analysis of physical assets and identification of likely causes of loss and liability
   vii. Access to insurance, risk management, and safety expertise and experience

Capabilities Analysis

In order to identify specific areas which United Way of Bristol needs to address in order to achieve its desired impact, key capabilities have been identified and then categorized according their current and needed levels of strategic focus.

			Needs to be Assessed	Needs further plan for improvement	Has Improvement plan in place	Continue as is

			1	2	3	4
Board/Governance						
	Legal Compliance					
		Bylaws that are regularly reviewed, updated, and followed				■
		Meeting minutes that are closely examined by the Board before approval				■
	Strategic Planning					
		Developing comprehensive strategic plans on a routine basis			■	
		Executing strategic plans in a timely and effective manner			■	
		Understanding and observance of mission				■
		Communicating a clear vision for the future of the organization		■		
		Agreement on the desired impact of the organization		■		
		Strong understanding of areas to improve			■	
	Board Development					
		Maintaining a Board of qualified members				■
		Preparing Board members to contribute effectively				■
		Strong evaluation process for potential Board members	■			
		Consistent identification and recruitment of potential board members	■			
	Board Management					
		Recognizing and addressing areas for Board improvement		■		
		Clear division of responsibilities between Board and staff		■		
Resource Management						
	Information Technology					
		Maintaining necessary computers and peripherals to support activities			■	
		Managing and securing all data and sensitive information	■			
	Building and Fixed Assets					

			Col1	Col2	Col3	Col4
		Well-maintained and up-to-date building and equipment				■
		Sufficient assets to support operations	■			
	Intangible Assets					
		Strong community partnerships and networks				■
		Strong partnerships with experienced business professionals				■
	Information Gathering and Management					
		Current and adequate understanding of community needs			■	
		Current and adequate understanding of community resources			■	
Human Resources						
	Staffing					
		Clear staffing plan in place			■	
		Sufficient number of personnel in place to support operations		■		
	Volunteers					
		Plan for recruiting and utilizing interns when possible		■		
		Plan for recruiting and utilizing volunteers when possible		■		
	Human Resources Administration					
		Up-to-date employee handbooks and policies	■			
		Sufficient payroll systems and processes				■
		Consistent and thorough employee evaluation processes	■			
Marketing and Public Relations						
	Donor Relations					
		Communication to donors of uses of funds	■			
		Proper recognition of donors	■			
	Partner Relations					
		Identification of potential community partners				■
		Ongoing efforts to build and maintain relationships				■

Community Relations					
	Communication to community of mission and programs		▓		
	Outreach to potential recipients of services	▓			
Finance					
Fundraising					
	Identification of potential corporate donors	▓			
	Identification of potential individual donors	▓			
	Convenient opportunities for all donors to give		▓		
Financial Management					
	Effective budgeting process				▓
	Accounting manual and procedures in place				▓
Financial Reporting					
	Efficient communication of financial information to board				▓
	Accurate cash flow management and projections				▓
Risk Management/Compliance					
Insurance					
	Complete Property and Liability coverage				▓
	Complete Directors and Officers coverage				▓
	Data breach coverage	▓			
Safety					
	Comprehensive security plan	▓			
	Sufficient security equipment and systems	▓			
	Comprehensive identification and analysis of risk	▓			
Disaster Planning					
	Comprehensive disaster plan in place	▓			
	Backup equipment and systems in place	▓			

Plan for Improvement

The United Way of Bristol's plan for improvement is divided into three sections: strategic initiatives, new services to add, and organizational recommendations. Together, they represent the areas on which United Way should focus in order to position itself to realize its vision in the years to come.

Strategic Initiatives

1. **Clarify our Vision and Purpose -** Develop a shared and understood description of the impact that the United Way of Bristol is striving to have on the local community and how its services should complement and enhance other services provided to individuals and other nonprofit organizations.
   Activities:
   a. Continue to gather feedback from community, member agencies, and other service organizations of the needs that exist in our community
   b. Study other United Ways to identify effective models that may fit the needs of our community

2. **Develop full strategies for each continued and each new service or program –** Build on the initial framework provided to create a strategy for envisioned service that offers sufficient detail to provide a clear picture of what the program is intended to do and to accomplish, and to offer reasonable steps which can be followed to create or improve the programs to their intended purpose

   Activities:

   a. Identify and describe recipients of services
   b. Communicate specific overall goals for program
   c. Select measures to evaluate and track progress
   d. Identify potential community partners

3. **Implement effective processes for continual improvement** – Develop planning processes to ensure that United Way is consistently utilizing the resources available to make strategic improvements in all necessary aspects of the organization
   Activities:
   a. Task the strategic planning committee with developing the strategic plan framework into detailed action plans
   b. Develop a dashboard to track planning progress and success in strengthening organizational services

    c. Implement an ongoing strategy for gathering, evaluating, and implementing best practices of national and area United Ways

    d. Conduct complete audit of processes and practices

    e. Develop a twelve-month rolling action plan for implementing critical strategic improvements

    f. Review and update the strategic plan on a regular basis

4. **Evaluate and reshape the campaign** – Examine the current campaign process and evaluate potential adjustments to the model to improve efficiency and better shape the campaign to the needs of agencies and the mission of United Way
Activities:

    a. Gather feedback from agencies on how the campaign is currently benefiting and how it might be improved

    b. Gather feedback from select individual donors on the role that the annual campaign should be serving in the larger picture of raising funds for local agencies

    c. Gather feedback from companies on how United Way could best support their internal campaigns

    d. Evaluate potential methods to distinguish internal fundraising from agency fundraising

    e. Evaluate the benefits and risks of providing increased flexibility for donors to direct funds to specific agencies and/or programs

Implementation of New Services

Many of the services included in the vision will either need to be developed from scratch or significantly reshaped from their current state. This section will lay out the dates that will be targeted for the initial launch of the programs, the benchmarks that the programs are intended to reach within the first twelve months, and the initial steps that will need to be carried out.

Educational and Training Opportunities for Not-for-Profits

Target Date for Implementation: July 2016

Initial Steps:

1. Gather feedback from agencies on training needs
2. Determine format of training, including locations, cost, time, and frequency
3. Identify potential speakers
4. Build partnerships with other United Ways and other organizations that would support the program

Short-Term Benchmarks:

1. Build strong base of Lunch and Learn format training sessions across Tri-Cities

2. Build strong base of more extensive training in a central location

Communication and Resource Hub

Target Date for Implementation: November 2016

Initial Steps:

1. Gather feedback from agencies on resources that are most needed
2. Build partnerships with other Bristol organizations that could support the effort
3. Evaluate software and programs that could support improved communication

Short-Term Benchmarks:

1. Launch an efficient communication platform that is consistently utilized by area organizations
2. Build a strong database of diverse professional resources

Backbone Agency

Target Date for Implementation: December 2016

Initial Steps:

1. Identify and engage an individual or committee to spearhead effort
2. Study the existing United Way model to identify elements to incorporate
3. Bring together community organizations to develop model of support structure
4. Identify specific areas of impact on which to focus initial efforts

Short-Term Benchmarks:

1. Develop a strong coalition of charitable, public, academic, and professional organizations to offer resources and professional guidance
2. Engage a core group of charitable organizations that will utilize and advocate for the resources provided
3. Build strong community awareness and support for the Collective Impact framework

Volunteer Management Program

Target Date for Implementation: January 2017

Initial Steps:

1. Review previous volunteer management program
2. Identify existing programs to gather volunteers
3. Communicate with agencies how they are currently recruiting volunteers
4. Connect with local schools and other organizations that could provide volunteers
5. Evaluate volunteer management software programs

Short-Term Benchmarks:

1. Launch a single platform used by area schools and organizations providing volunteers
2. Engage most area organizations in consistently updating volunteer opportunities on the platform

Development of Programs to Address Social Needs

Target Date for Implementation: February 2017

Initial Steps:

1. Identify and engage an individual or committee to spearhead effort
2. Study the existing United Way model to identify elements to incorporate
3. Build a map of existing programs and services in relation to community needs
4. Identify specific areas of impact on which to focus initial efforts

Short-Term Benchmarks:

1. Increase consistent dialogue between regional organizations addressing related needs
2. Create strong awareness of existing programs and remaining needs
3. Build active coalitions around key community needs

Other Planning Recommendations

1. Implement campaign improvements
   a. New avenues to educate potential donors
   b. Better utilization of technology
   c. Better communication of campaign best practices to companies
   d. More formal process for identifying companies to contact
2. More focused marketing efforts to communicate the mission and programs of United Way throughout the year
3. Identify ways to raise funds for United Way overhead and internal programs separately from agency fundraising
4. Develop a long-range staffing plan
   a. Budget for an additional staff person
   b. Gather more information on where staff currently focuses time to incorporate into long term staffing needs
5. Implement a more formal process for gathering strategic feedback and recommendations from agencies, companies, and other stakeholders
6. Develop a model of existing programs and services that are currently meeting community needs and communicate the model to the public and to agencies

Plan Execution

While this strategic plan document is not intended to communicate the full detail of the action plans on which its execution will ultimately depend, the following elements are key aspects of the overall framework into which those action plans will fit.

Key Steps

Description	Responsible	Goal Date	Notes
Implement existing campaign recommendations	Campaign Cabinet	September 2016	Recommendations will be implemented at various intervals depending on feasibility and need
Develop goals for strategic planning committee	Strategic Planning Committee	November 2016	Existing strategic plan committee will evaluate need and benefits to adding more members and then layout goals utilizing strategic plan
Identify individuals to head the development of the strategic plan for each program	Board	November 2016	Individuals may be selected from among Board, Staff, and other volunteers
Complete full assessment of all areas selected from capabilities analysis	Board	December 2016	Board will identify individual/committee to conduct each assessment
Schedule initial meeting with other organizations to build network for communication hub	Board	November 2016	Board will coordinate with staff to identify organizations and develop plan to engage them
Evaluate and select volunteer management platform	Staff	September 2016	Staff will follow up on existing contacts and make a recommendation to the Board
Meet with member agencies and other not-for-profits to expand on goals for backbone agency and communication hub programs	Board	October 2016	Initial goals can be drafted based on prior communications and the plan draft but will need to be given further detail and specifics based on agency feedback
Review and potentially revise mission, vision, and value statements	Strategic Planning Committee	September 2016	Mission statement should be examined for clarity and effectiveness in communicating specific direction; vision and value statements should be considered to complement the mission statement
Select measurement factors and develop dashboard for plan progress	Strategic Planning Committee	October 2016	Initial KPI recommendations should be considered, but further indicators should be added that will reflect various aspects of the plan
Identify and evaluate alternative campaign models for future years	Executive Committee	January 2017	2016 campaign results and endowment fund progress should be taken into account as other existing models and potentially new ones are evaluated against the United Way mission

Key Performance Indicators

Although the achievement of the desired impacts that were presented at the beginning of the plan document are the ultimate focus and measure of success for the United Way of Bristol, additional Key Performance Indicators are also needed in order to be able to track the specific progress and success of the strategic plan. In order to be effective in that role, the selected indicators must be able to be objectively measured, have the potential to be observably impacted by the specific activities of United Way of Bristol, and provide early indication of long-term impact with a high degree of correlation.

1. Number of local agencies utilizing the collective impact framework
2. Number of active volunteers in community
3. Total individual and corporate donations received by local agencies

12-Month Vision

The following goals represent aspects of the vision which the United Way of Bristol is focused on achieving over the course of the next twelve months:

1. A clear overall mission that is well-recognized and supported by the member agencies and the community
2. Clear strategies for each of the envisioned services, with significant progress on the development of all new services and strong coalitions in place for all collaborative programs
3. An active and engaged strategic planning committee that is evaluating and recommending strategic improvements throughout the year in all critical areas of operation
4. An efficient campaign that engages as many potential donors as possible and best complements the individuals fundraising efforts of the local not-for-profit organizations.

Appendix

Throughout the planning engagement, a significant amount of information and feedback has been gathered. Since the planning document itself has been designed to focus primarily on the analysis of the information and the actions that the United Way of Bristol has elected to take as a result of that analysis, most of the underlying data and information that was gathered has not been explicitly reported in the main part of the document. The appendix is included so that some of that additional information can be communicated for use in future strategic decisions and future strategic planning processes.

Potential Measurement Factors

Organizational

1. $ Raised for internal needs and direct programs
2. Board attendance
3. Committee engagement
4. Agency feedback scores

Agency Fundraising

1. Total $ raised
2. % of benchmark raised
3. # of lives impacted

Agency Evaluations

1. # of certified agencies
2. # of agencies provided with tangible recommendations
3. % of recommendations implemented

Resource Hub

1. # of agencies served
2. # of people indirectly served through agencies
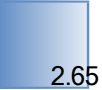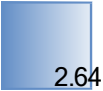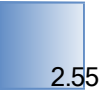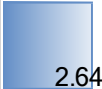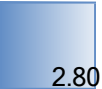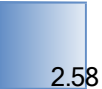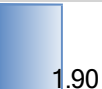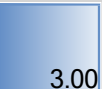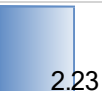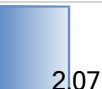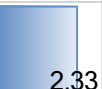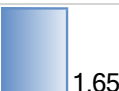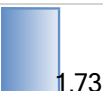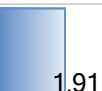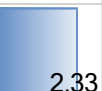
Volunteer Management
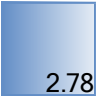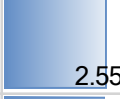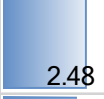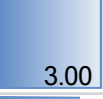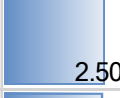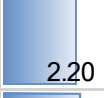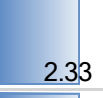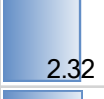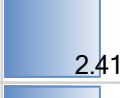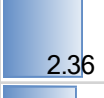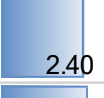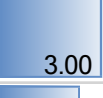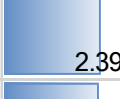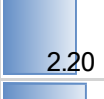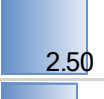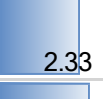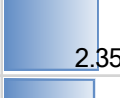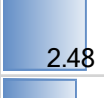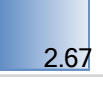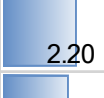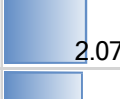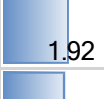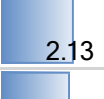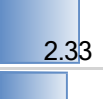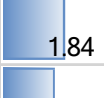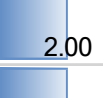
1. # of agencies served
2. # of volunteers signed up
3. % of volunteers placed
4. # of volunteer hours provided
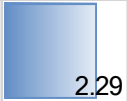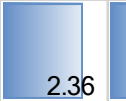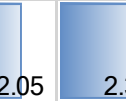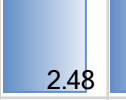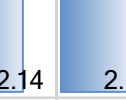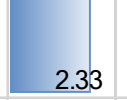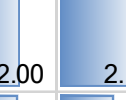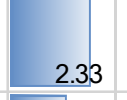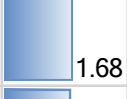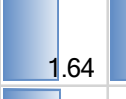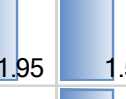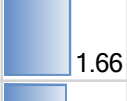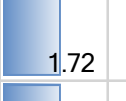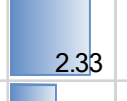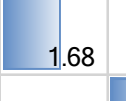
Education and Training

1. # of classes provided
2. # of attendees
3. Attendee evaluation scores
4. % of returning attendees

Survey Results

How important do you feel that each of the following efforts is to the overall mission of United Way?	Weighted	Board	Campai	Membe	Agency	Staff
Raising awareness of the needs in our area	2.84	2.88	2.82	2.96	2.65	3.00
Raising awareness among the public of member agencies	2.79	2.92	2.64	2.93	2.55	3.00
Helping to direct contributions to the agencies that have the most need and can best utilize funds	2.71	2.64	2.77	2.80	2.58	3.00
Directing potential recipients to the agencies that can best meet their needs	2.67	2.72	2.77	2.67	2.55	3.00
Organizing new coalitions to meet needs in the community	2.13	2.32	1.86	2.24	1.90	3.00
Increasing the amount of money that member agencies are able to raise (outside of the UW campaign)	2.02	1.92	1.82	2.07	2.23	1.33
Providing training and resources to non-profit agencies	1.99	2.28	1.82	2.07	1.74	2.33
Directly providing services to individuals that are not met by other agencies	1.65	1.40	1.73	1.91	1.32	2.33

How important do you feel it is for United Way to improve in the following areas?	Weighted	Board	Membe	Staff		
Cultivating new donors	2.82	2.88	2.78	3.00		
Identifying and contacting new company and individual donors	2.78	2.88	2.72	3.00		
Coordinating campaign efforts	2.55	2.48	2.57	3.00		
Collecting and distributing funds efficiently	2.50	2.20	2.67	2.33		
Budgeting	2.44	2.32	2.51	2.33		
Educating/cultivating current donors	2.41	2.36	2.40	3.00		
Evaluating agencies	2.39	2.20	2.50	2.33		
Overall visibility of UWB - outside campaign season	2.35	2.48	2.26	2.67		
Training and mentoring new board members	2.23	2.20	2.24			
Recruiting new Board members	2.07	1.92	2.13	2.33		
Working cooperatively with other Tri-City United Way agencies	1.95	1.84	2.00	2.00		
Special recognition of Leadership donors	1.53	1.52	1.50	2.00		

Which of the following do you feel are significantly limiting potential donors from donating as much as they are able?	Weighted	Board	Campa	Membe	Staff
Potential donors not being reached	2.29	2.36	2.05	2.32	3.00
Lack of awareness of where the funds will go	2.22	2.48	2.14	2.11	2.33
Misunderstanding about United Way	2.20	2.52	2.00	2.11	2.33
Understand United Way, but disagree with it	1.68	1.64	1.95	1.57	1.67
Adequacy of staff to cover demand of campaign	1.66	1.72		1.59	2.33
Frustration/resentment over past experiences with other UW campaigns	1.53	1.68		1.45	1.33
Putting off or forgetting to donate	1.50		1.50		
Frustration/resentment over past experiences with UWB campaigns	1.47	1.56		1.45	1.00

In which of the following areas do you feel that additional information would help the Board make better decisions?	**Board**							
Operations and services of member agencies	2.50							
Perception of United Way in our community	2.50							
Information on need in our local area	2.48							
Best practices of other United Ways	2.33							
Operations and services of other nonprofits in our area	2.29							
Information on United Way's finances and cash flow	1.58							

How much of an impact do you feel that the following efforts could be helping your company better maximize its campaign?	**Campaign**							
More testimonials/support from member ag	2.62							
Additional information on the overall need i	2.59							
Additional information on how United Way v	2.50							
Additional information on the services prov	2.27							

Please rank how critical the following are to your agency right now?	Agency							
Raising funds	2.71							
Informing the public about what the agency	2.55							
Coordinating with other organizations that p	2.23							
Reaching potential recipients of services	2.16							
Identifying needs in the community that the a	1.97							
Accessing affordable professional training	1.84							

Which of the following do you feel limit direct donations to your agency?	Agency							
Potential donors not being reached	2.45							
Inaccurate perception about the urgency of	2.29							
Lack of awareness of what the agency doe	2.19							
Funds being donated to other organizations	1.58							
Giving isn't convenient enough for donors	1.40							

In which of the following areas do you feel that action or improvement is needed by the Board in order to allow the staff to more effectively do its job?	Staff						
Evaluating staff levels	2.67						
Considering investment in new equipment	2.67						
Offering additional guidance and support in professional areas	2.67						
Considering investment in new software	2.33						
Setting clearer goals and direction for the organization	2.33						
More direct participation in the daily activities of UWB	1.33						