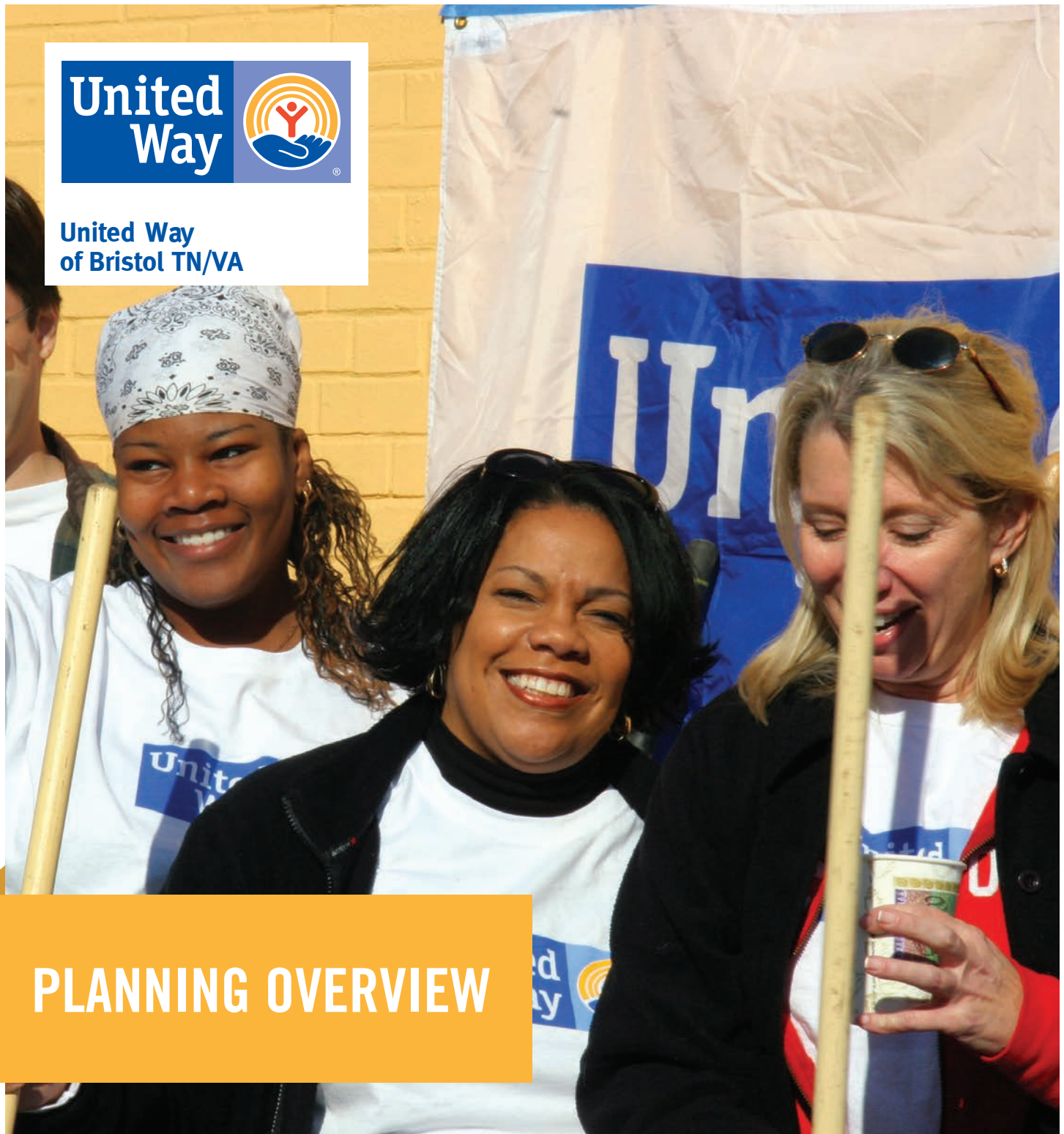


**United  
Way**



**United Way  
of Bristol TN/VA**



# PLANNING OVERVIEW





# CONTENTS

**3** United Way of Bristol Vision  
Desired Impact

**5** Independent Services Provided  
(both current and proposed)  
Vision Goals

**6** Collaborative Services Provided  
(both current and proposed)

**7** Services to Consider for the Future  
Plan for Improvement  
Strategic Initiatives

**10** Implementation of New Services

**11** Other Recommendations



# VISION & GOALS

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.

**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

**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

**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



**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

## **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

# COLLABORATIVE SERVICES

## **Service 3: 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 4: 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 5: 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



# SERVICES TO CONSIDER FOR THE FUTURE

## **Service 6: 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 7: Provide a single point of contact for those in need to connect to the ideal service**

Objectives:

Communicate to potential recipients the services that are available to them

Provide the appropriate level of support to assist individuals in reaching the need necessary

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

# PLAN FOR IMPROVEMENT

## 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

## Develop full strategies for each continued and each new service or program

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

## 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

## 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

## **Development of Programs to Address Social Needs**

### Initial Steps

Study the existing United Way model to identify elements to incorporate

Bring together community organizations to develop model of support structure

Identify specific areas of impact on which to focus initial efforts

## **Educational and Training Opportunities for Not-for-Profits**

### 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 Communication and Resource Hub
5. Gather feedback from agencies on resources that are most needed
6. Identify existing programs that are offering similar or complementary benefits
7. Build partnerships with other Bristol organizations that could support the effort

## **Volunteer Management Program**

### 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



# OTHER 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



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