

Strategic Plan Goals, Aspirations, and Activities April 2008

1) Vision/Mission Goal:

Sustain and expand as the *Power of Partnership*TM leader for the communities that we serve.

Aspirations

- A. Develop and define Community Impact goals and objectives for Children, Families, and Seniors in alignment with the *Power of Partnership*TM.
 - 1. Establish and recruit UWSBC *Power of Partnership*TM Initiative Committee.
 - 2. Complete *Power of Partnership*TM Initiative implementation plan.
 - 3. Integrate activities with ongoing Community investment and Resource Development activities.
 - 4. Build *Power of Partnership*TM relationships based on making meaningful changes for the community.
 - a. Establish, recruit and hold initial meeting of the *Power of Partnership*TM Initiative Vision Council.
 - i. Define potential membership.
 - ii. Design and develop contact materials/methods.
 - iii. Complete core support group initial contacts.
 - b. Establish and recruit *Power of Partnership*TM Sponsors Advisory Council. Develop support materials.
 - c. Establish, recruit and hold initial meeting of *Power of Partnership*TM Focus Area Steering Committees.
 - d. Hold first round of *Power of Partnership*TM Initiative Expert and Community Leader Forums.
 - 5. Develop written two-year milestone targets for each category of focus areas: children & families and seniors & families by July 2009.
 - 6. Develop policies, procedures, and forms (paper and electronic) that support the written outcomes and targets above by July 2009.
 - 7. Implement new gift levels in February 2008 for home donors and prospects and in May 2008 for workplace donors and prospects. Examine increased pricing schedule for all sponsorship activities.
- B. Design, develop, and invest in consensus-based community improvement processes with traditional and non-traditional partners.
 - 1. Develop and define United Way Community Impact goals and objectives for Children, Families, and Seniors in alignment with the *Power of Partnership*TM plan and national initiatives.
 - a. Involve volunteers and stakeholders in the design process of determining UWSBC Community Impact goals, objectives, policies, and procedures.
 - 2. Continue to build new relationships with community partners to foster collaborative efforts to achieve Community Impact goals.

3. Develop long-term volunteer involvement strategies, policies, and procedures to ensure donor participation in the *Power of Partnership*TM plan implementation and UWSBC Community Impact goals.
4. Annually, (either December or June) perform a written evaluation of our current partnerships for efficiency, effectiveness, and partnering goals. This evaluation will be focused on improving UWSBC's alignment with Children, Families, Seniors, and Community goals. This evaluation will focus on quality more than simply the quantity of outcomes, quantity of dollars, or quantity of partnerships. The goal will be to retain or develop a smaller number of larger, more impactful partnerships.
5. Invite applications and letters of interest from community organizations for partnership and grants for FY 2010 – 2011 by November 2009 to follow the Community Impact goals, outcomes, and processes.
6. Develop appropriate volunteer activities to support these outcomes within twelve months of each implementation step.

2) Resource Development Goal:

Seek and develop resources for the purpose of meeting the current requirements of our Vision and Mission.

Aspirations

- A. Clearly define and communicate our value in an exciting, multifaceted, and inspirational manner.
 1. Develop and test new *Power of Partnership*TM look.
 2. Align collateral materials to new direction.
 3. Selectively test within existing annual campaign and special events.
 4. Integrate UWSBC diverse marketing efforts into a unified message focusing on *Power of Partnership*TM.
 5. Selectively expand donor survey practices to include *Power of Partnership*TM Initiative activities.
 6. Expand our brand on the Web and create interactive methods for communicating our value to existing and prospective donors and partners.

- B. Continue and refine the focus on Community All Stars and resources under management from work, home, and community, and integrate donor relationship activities with the *Power of Partnership*TM.
 1. Increase focus on sustainable CAS Leadership and Tocqueville giving.
 2. Seek increased revenue focused on UWSBC's capacity to deliver the strategic plan.
 3. Develop, test, and evaluate *Power of Partnership*TM Leadership Giving categories.
 4. Explore new donor loyalty building engagement methods.
 5. Develop and test new "giving cases" with an array of investment choices.
 6. Align reporting systems to highlight "resources under management" progress.
 7. Experiment with *Power of Partnership*TM progress feedback methods to insure integral, appropriate and cost-effective reporting of meaningful results.
 8. Expand customer engagement activities for Leadership Circle and Alexis de Tocqueville prospects and members by at least 5% per year.

9. Annually retain and expand existing support from foundations, corporations and community organizations. Evaluate and test new prospects annually.
10. Explore and apply to regional grant makers during FY 2008-2009.
11. Explore and apply to national and federal grant-makers during FY 2009-2010.
12. Retain and grow workplace fundraising. Increase focus and activities with larger donor prospects (e.g., corporate boards of directors, IPO holders, senior management team members, etc.) for FY 2009.
13. Explore and apply to public sector, education sector, and private sector entities for contract-for-service opportunities during FY 2009-2012.
14. Develop appropriate volunteer activities to support these outcomes within twelve months of each implementation step.

3) Legacy Goal:

Secure the *Power of Partnership*TM plan through long-term committed volunteer leadership, manageable resources, and endowment.

Aspirations

- A. Use strong and thoughtful processes of cultivating volunteers and staff, build succession plans, develop a multi-year focus and outreach to new participants.
 1. Increase meaningful activities for volunteers on a year-round basis.
 2. Launch Volunteer Santa Barbara County! Initiative by June 2008. Includes:
 - a. Interactive website.
 - b. Secure 500 – 1,000 volunteer opportunities posted, training classes for organizations, charities, and individual volunteers.
 - c. Implement regional media plan for recruiting individuals by June 2008. Launch Volunteer Recognition plan.
 3. Recruit Volunteer Santa Barbara County! founding sponsor(s) and at least three platinum, gold, or silver monthly sponsors by July 2009.
 4. Implement broad outreach to selected audiences (e.g., newcomers, early retirees, workplace employees) to increase number of total volunteers and number of total volunteer hours by June 2009.
 5. Develop a staff retention plan.
 6. Develop and implement plan for multiple Days of Caring throughout each year from 2009 to 2012.
- B. Invest to grow endowment and long-term resource-building activities
 1. Adopt a policy of funding 100% of previous year's audit depreciation amount, deposited to a separate reserve holding account by April 2008, to begin July 2008.
 2. Use gift-planning techniques to increase the number and size of major gifts for current and deferred purposes by July 2008.
 3. Develop appropriate volunteer activities to support these outcomes within twelve months of each implementation step.

4) Capacity Goal:

Build quality-based capacity to deliver the *Power of Partnership*TM plan.

Aspirations

- A. Involve volunteers in developing and implementing a governance process to ensure the long-term sustainability of the *Power of Partnership*TM.
 1. Define long-term sustainability.
 2. Consider and analyze various integrative corporate structures: one corporation, two corporations (one traditional, one consisting of new programs) or combinations.
 3. Develop greater engagement from core volunteers.

- B. Build a business plan, and as part of that business process, develop an infrastructure investment plan to ensure the most effective capacity to deliver the *Power of Partnership*TM.
 1. Complete Business Plan in 2008.
 2. Develop new value-based financial planning and reporting methods.
 3. Develop and approve three-year rolling budget forecasts as primary budget tool by July 2008.
 4. Develop short and long term infrastructure investment plans.
 5. Develop and implement three-year staffing plans to anchor and sustain the quality component of the *Power of Partnership* by July 2008. Include budgets for retention efforts as well as recruitment.
 6. Develop and implement a resource development campaign focused on increasing revenue targeted towards UWSBC's infrastructure and capacity.
 7. Develop and implement three-year capital budget plans to maximize return on fixed assets by July 2008. Establish written useful life spans and actual replacement date schedule (and place into master calendar and annual work plans) for building systems and equipment.
 8. Investigate, explore, and report on concept of subsidiary corporations and local parent holding corporations by December 2009.
 9. Develop appropriate volunteer activities to support these outcomes within twelve months of each implementation step.