



United Way
Central & Northern
Vancouver Island

2015 – 2018 Strategic Plan



UWCNVI Goal:

Create opportunities for a better life for everyone in our communities

Mission:

We improve lives and build community

- ❖ **Donor competition**
Rapid increase in number of charitable organizations in Canada
- ❖ **United Way fatigue**
After 50 years of workplace fundraising, employees and workplaces are not inspired by the “system”
- ❖ **Mass digitalization=“middleman” role reduced**
Role of facilitating philanthropy is no longer needed due to user driven models/technology advances
- ❖ **Economic instability**
BC continues to struggle with economic turmoil
- ❖ **Regional model complexities**
Serving many different communities adequately a challenge

SWOT Analysis



Strengths

- ◆ Trusted and well-known brand
- ◆ Access to a broad donor pool within workplaces
- ◆ Longstanding presence in the community – recognized for investing in the social service sector
- ◆ In Central Island, developing stronger partnerships with a cross-section of stakeholders- Vital Signs, etc.
- ◆ Committed volunteers and staff
- ◆ Embraced Outcome Measurement model
- ◆ Impact is more than grants – helping homeless/early years

Weaknesses

- ◆ Workplace campaigns are seen as our way of doing business – need diversity
- ◆ Community Impact has not become part of our brand identity
- ◆ No prospecting for several years
- ◆ UW's multi-issue focus not as easily understood as single issue charities
- ◆ UWCNVI not as well known outside of Central Island
- ◆ Reliance on Community Partners to provide engagement opportunities for donors
- ◆ Staffing changes created lapses in relationship building and productivity

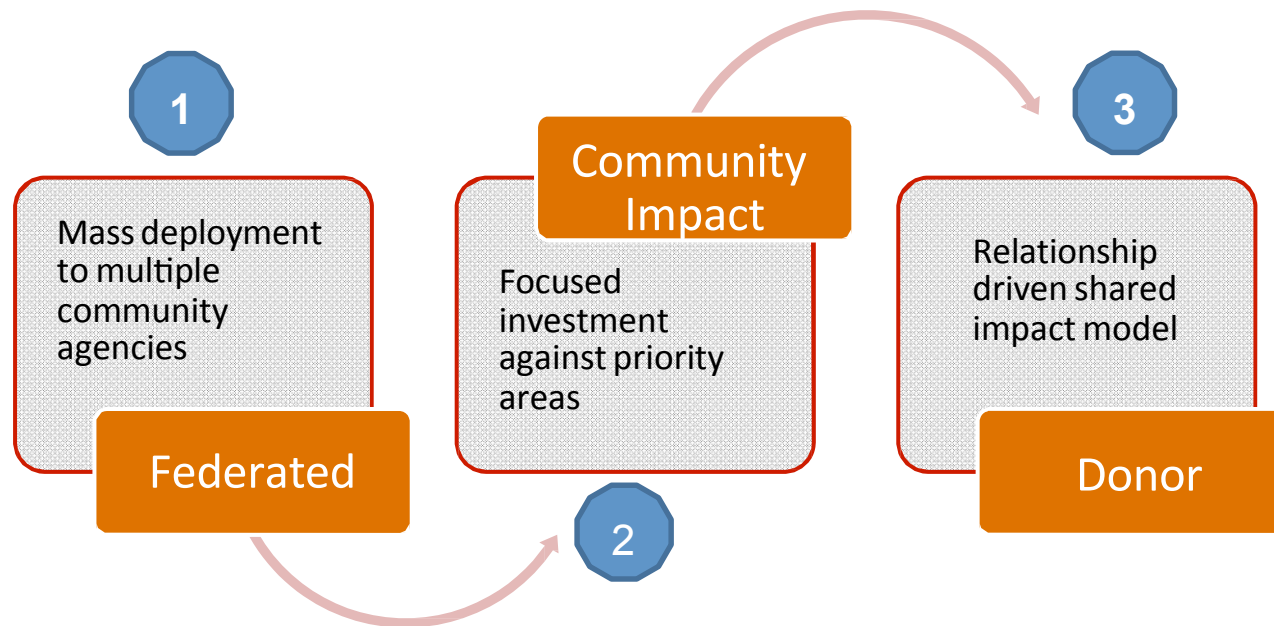
Opportunities

- ◆ Growing demand for businesses to be socially responsible – ability to create shared value
- ◆ Many workplaces and local corporate prospects have never been approached
- ◆ UW donors from across Canada retire here & untapped retiree wealth in the region; leadership and planned giving potential
- ◆ Leverage Labour partnership
- ◆ Build relationships with municipalities & school districts
- ◆ Leverage National marketing message locally
- ◆ Expand geographic area: Regional UW north of Malahat – strengthen Impact
- ◆ New donor database system

Threats

- ◆ Increased competition within philanthropic landscape
- ◆ Economic uncertainty may continue to impact individual and workplace giving
- ◆ Donors are flooded with information from thousands of charities, some have significant resources for marketing.
- ◆ There is an increase in competition for workplace campaigns
- ◆ Donor engagement must be handled cautiously to ensure connection with UW vs. Community Partners
- ◆ Younger demographic don't find UW appealing

Evolving our Impact Strategy



Working on 2 while also taking steps to move to 3

Strategic Focus



Strategic Focus Detail



Increase Revenue to Better Serve Communities

- **Deliver a donor experience that attracts and inspires**
 - ◆ Workplace campaigns will attract & inspire participation
 - ◆ Major gifts & leader donor best practices are utilized
 - ◆ Corporate Giving will be an integrated revenue stream
 - ◆ Individual giving best practices are utilized
 - ◆ Donor records management is efficient & effective
 - ◆ Planned Giving best practices are utilized

Improve Brand Profile

- **Co-ordinated, targeted communications**
 - ◆ Streamline/integrate across departments
 - ◆ Increase brand awareness through volunteer brand ambassadors/explaining Impact outcomes
 - ◆ Increase profile outside Central Island (CI)
 - ◆ Become experts/leaders on social issues

Evolve Community Impact Model

- **Solidify existing impact work; determine new impact investment strategy**
 - ◆ Implement Housing First model in Nanaimo
 - ◆ Take Outcome Measurement model to next level- training/tools
 - ◆ New investment strategy to match community need in CR & CV
 - ◆ New regional SB6 co-ordination model
 - ◆ Proactive repackaging of current CI investments
 - ◆ Align Impact work in new geographic area- Malahat North

Increase Effectiveness of Business/Best Governance Practices

- **Strong systems support growth**
 - ◆ Implement new donor software
 - ◆ Rationalize Back of House/Improve Impact through larger regional UW
 - ◆ Update Risk Assessment process
 - ◆ Strengthen regional volunteer representation
 - ◆ Up-date HR Manual
 - ◆ Up-date Staff/create Board performance management system
 - ◆ Re-write of several policy series

Increase Revenue to Better Serve Communities



Workplace Campaigns

■ Workplace campaigns will attract & inspire participation

- ◆ Evaluate and streamline workplace accounts
- ◆ Inspire leadership in workplace Campaigns
- ◆ Offer increased training for Employee Campaign Chairs
- ◆ Attract new accounts
- ◆ Retain and support current workplace accounts through effective impact communications
- ◆ Create, improve and implement consistent stewardship recognition systems
- ◆ Research & recruit additional Campaign Associates

Major Gifts & Leader Donors

■ Major gifts & leader donor best practices are utilized

- ◆ Create & implement a best practice major gifts & leader donor engagement & stewardship program
- ◆ Retain staff to develop & manage the program
- ◆ Staff develop consistent, reliable record keeping practices
- ◆ Provide a consistent donor experience
- ◆ Research, prospect & steward donors using available internal & external sources

Corporate Giving

■ Corporate Giving will be an integrated revenue stream

- ◆ Ensure appropriate resources are allocated to develop this revenue stream
- ◆ Research & engage with new corporate partners
- ◆ Steward existing relationships
- ◆ Create & utilize asset based and impact focused relationships in the business community
- ◆ Become known as a valuable professional team
- ◆ Research & appeal to Corporate Social Responsibility of our partners

Individual Giving

■ Individual giving best practices are utilized

- ◆ Create & implement a best practice individual donor engagement & stewardship program
- ◆ Create effective institutional memory systems to ensure consistent donor experience
- ◆ Research, prospect & steward donors using available internal & external sources
- ◆ Direct mail strategies are researched and implemented as part of the overall Resource Development Plan

Donor Records Management

■ Donor Records Management is efficient & effective

- ◆ Explore best options for donor records management including Andar
- ◆ Build institutional memory with current systems
- ◆ Create effective institutional memory systems to ensure consistent donor experience
- ◆ Ensure all staff are trained & effectively inputting and utilizing data to support best practices of donor prospecting, recognition & stewardship

Planned Giving

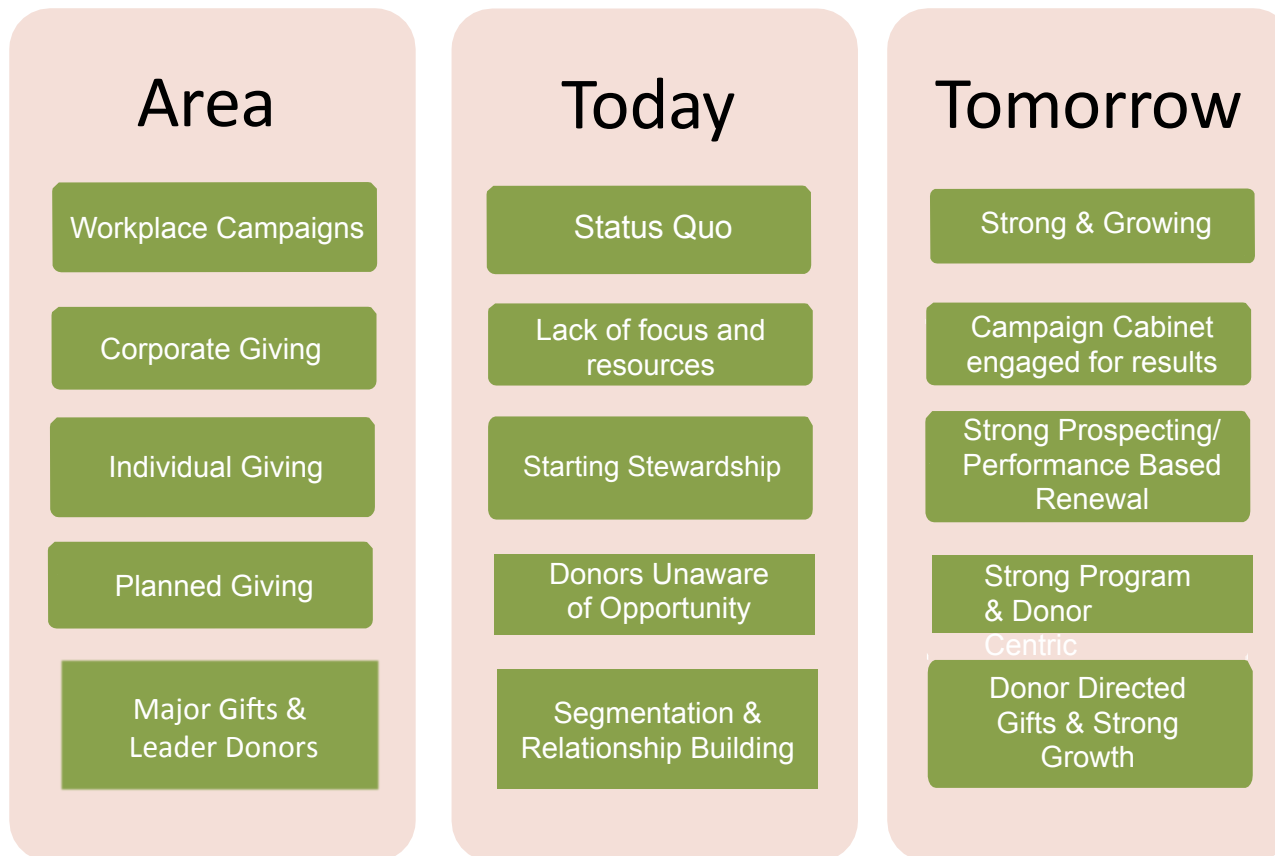
■ Planned Giving best practices are utilized

- ◆ Develop and implement a Planned Giving Strategy
- ◆ Research new & utilize existing relationships to promote Planned Giving as a natural & viable option
- ◆ Explore internal opportunities for legacy giving
- ◆ Utilize internal systems such as database & direct mail for prospecting and stewardship
- ◆ Effectively recruit and support Cabinet members who will steward gifts

Increase Revenue to Better Serve Communities



Evolving to Donor Centric & Impact Oriented Resource Development



Improve Brand Profile



Co-ordinated, targeted communications

Tactic	Activities	Timeline	Additional Resources
1. Streamline/integrate across departments and with UWCC movement	<ul style="list-style-type: none"> • Create Communications Officer position. Hire to manage all communications work • Participate in National marketing strategy 	<p>2015 Q1</p> <p>2015-2017</p>	<ul style="list-style-type: none"> • \$20,000 additional in year one. On-going • \$3,600K – Year 1+ (UWCC – Annual fee)
2. Increase Brand Awareness through volunteer brand ambassadors	<ul style="list-style-type: none"> • Recruit more up island board members • Recruit campaign teams in all four areas • Develop training plan • Deliver training plan • Monitor number of presentations, earned media 	<p>2015/16</p> <p>2015/16</p> <p>2015</p> <p>2015-2017</p> <p>2015-2017</p>	
3. Increase profile outside Central Island	<ul style="list-style-type: none"> • Increase radio, billboard and print ads in North Island • Hire North Island staff person 4 days week/full year • Increase staff person to full time 	<p>2015</p> <p>Q2 2015</p> <p>2016/2017</p>	<p>\$6,000</p> <p>\$10,000 additional over 2014</p>

Improve Brand Profile



Co-ordinated, targeted communications

Tactic	Activities	Timeline	Additional Resources
4. Communicate leadership on Social issues	<ul style="list-style-type: none">• Participate in Vital Signs and other community based indicator reports• Proactively speak to media on topics/issues we are funding or involved in on leadership level	2015-2017 2015-2017	Same as under 1 and 3.

Evolve Community Impact Model



Solidify existing CI efforts; determine new CI strategy

Tactic	Activities	Timeline	Additional Resources
1. Housing First Model Nanaimo and Comox	<ul style="list-style-type: none"> • Work with NCAB and consultant to finalize model • Develop CFP • Develop MOU with Island Health service providers • Work with Advisory Committee to monitor implementation/ results • Invest through UW Grant in HF program in Comox 	Q1 Q1 Q2 2015-2017 2015-2017	
2. Proactive repackaging of current CI investments	<ul style="list-style-type: none"> • Test research in 6 workplace accounts • Look at what other UW's are doing around re-packaging and determine direction and recommendations • Implement re-packaging 	2015/16 2016-2017 2015-2018	
3. Take Outcome Measurement model to next level training/tools	<ul style="list-style-type: none"> • Hire consultant to review, recommend and assist • Assess results • Determine next steps/revisions after we have new impact investment strategies for CI and CV 	Q3 2015/16 2016-2017 2017/18	\$8,000 in 2015 TBD 2016 TBD 2017

Evolve Community Impact Model



Solidify existing CI efforts; determine new CI strategy

Tactic	Activities	Timeline	Additional Resources
4. Conduct Research and create new investment plan for CI and CV	<ul style="list-style-type: none"> Hire an Impact Manager or consultant Conduct research/consultations Introduce plan January 2017 	2016/17 2016/17	\$TBD
5. Implement new regional SB6 co-ordination model	<ul style="list-style-type: none"> Host Aboriginal engagement consultations for Oceanside, P. Alberni, Ladysmith, Nanaimo and Tofino/Uclulet Determine new model using AE consultation and Raising the Village report Hire new Regional Co-ordinator Central Island Hire Regional Co-ordinator North Island Monitor results of new model 	Q1-2 – 2015 Q 2- 2015 Q-1 – 2015 Q1 2015/16 2016-18	
6. Align Impact work in new geographic area	<ul style="list-style-type: none"> Pre and Post work with Impact Council in new geographic area to align the funding strategy 	2015/17	

Best Business/Governance Practices



Strong business/policy systems to support growth

Tactic	Activities	Timeline	Additional Resources
1. Implement new donor software	<ul style="list-style-type: none"> • Work with UW Lower Mainland to determine possible back of house contract • Purchase license and convert data • Training and implementation 	Q1-2 2015/16 Q1-2015/16 Q1-2016/17	\$30,000
2. Merge with other United Way for efficiency	<ul style="list-style-type: none"> • Secure UWCC commitment • Participate in facilitated process with both Boards • BOD approve plan September 2015 • Member approval AGM November 2015 • Communication strategy November 2015- March 2017 	Q2 2015/16 2015/16 Q2 2015/16 Q3 2015/16	
3. Conduct Risk Assessment process	<ul style="list-style-type: none"> • Collect examples from other United Ways/other sources • Board/staff review research/determine process • Implement recommended changes 	Q1-2 2015/16 Q2 2015 2015/16	
4. Strengthen volunteer base/ regional representation	<ul style="list-style-type: none"> • Identify candidates • Finalize new BOD recruitment package • Recruit CR Campaign team • Recruit/Integrate for new region after merger 	Q-1-3 2015 Q2 2015 Q2 2015/16 TBD	

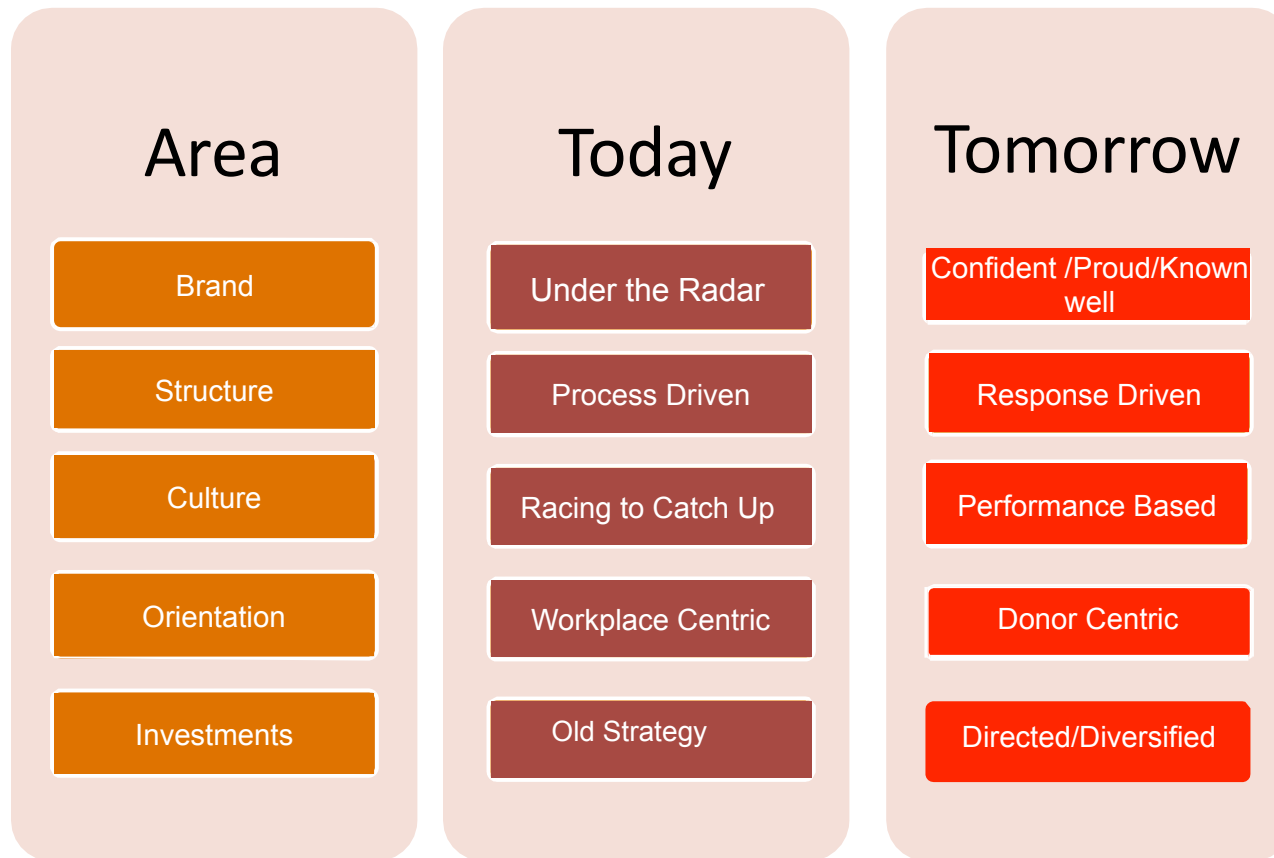
Best Business/Governance Practices



Strong business/policy systems to support growth

Tactic	Activities	Timeline	Additional Resources
5. Up-date HR Manual	<ul style="list-style-type: none"> • Hire consultant • Review recommendations • Adopt new manual 	Q1 2015/16 Q2 2015/16 Q3 2015/16	\$1,800
6. Board performance management system/ up-date Staff performance management system	<ul style="list-style-type: none"> • Survey Board Satisfaction • Board Performance System Created/implemented • Staff Performance System re-vamped 	Q1 2015/16 2015/16 Q3 2015/16	
7. Re-write of some Governance Policies	<ul style="list-style-type: none"> • Series 300, 400, 500,600 	2016-2017	Governance Committee volunteers

Organization Transformation



Evolving to Community Impact/Donor Directed