

United Way Simcoe Muskoka 5 Year Strategic Plan

Mission: To improve lives and build communities by leveraging collective resources and mobilizing collective action to achieve the greatest impact.

Strategic Direction	Champion Stewardship and Investments 1	Communicate to Grow Engagement 2	Cultivate and Create Partnerships 3	Diversify & Increase Revenue 4	Continue to Engage in Social Enterprise 5	Maximize Community Impact 6	Be a High-Performing Organization 7
Specific Projects and Initiatives	1. Create and execute stewardship plan for all stakeholders that is aligned with our current donor benefit matrix	1. Prepare marketing and communication plan to include at minimum: <ul style="list-style-type: none"> ◦ Website re-development ◦ Digital strategies action plan ◦ Content library ◦ @ work tool ◦ Traditional marketing and communication activities 	1. Collaborative initiatives: monitor, evaluate and report outcomes 2. Develop and execute new approaches to partners, including labour to leverage financial resources and achieve shared outcomes 3. Collaborate with community partners and agencies for greater impact	1. Raise UWSM profile and support by developing a generational strategy 2. Further enhance relationship engagement with intentional activity and processes focusing on long term donor engagement across all fundraising strategies	1. Develop a plan to refine operating structure, growth targets and implementation strategy for expanded activity 2. Continue to identify and increase number of utility sector clients and capacity to administer current and evolving programs 3. Determine optimal ROI on current call centre model	1. Produce an annual community impact plan/strategy which <ul style="list-style-type: none"> ◦ Measures outcome of investments made into partner agencies ◦ Actively communicates and engages with donors ◦ Identifies and activates advocacy role 2. Create online tool to manage application/allocation process	1. Build compliance requirements into operating plans for staff and workplans for board committees 2. Align performance reporting with the UWCC dashboard indicators 3. Demonstrate system citizenship through participation in national committee(s) and system transformation activity
Measures of Success	<ul style="list-style-type: none"> ◦ % of return/repeat donors ◦ Donor satisfaction survey ◦ Donor referral success 	<ul style="list-style-type: none"> ◦ Plan complete and approved ◦ Traffic statistics ◦ Conversion rates ◦ Earned media ◦ # community speaking engagements ◦ Revenue from direct mail ◦ Acquisition of new donors ◦ Acquisition of new volunteers 	<ul style="list-style-type: none"> ◦ # of collaborative initiatives (1 per year minimum) ◦ # of new partnerships with United Way ◦ Partnership/Agency satisfaction feedback/survey results ◦ # of projects with revenue matches ◦ # of labour relationships 	<ul style="list-style-type: none"> ◦ Increase in donor retention ◦ Increase in gift average ◦ Increase in planned giving program ◦ % of revenue growth from each pillar of the UWSM business model 	<ul style="list-style-type: none"> ◦ Increase utility clients by one per year ◦ Identify and maximize ROI ◦ Reflect diversity and inclusion in Customer Service Representative hiring 	<ul style="list-style-type: none"> ◦ Outcomes that achieve stated improvement ◦ Partner Agency ROI ◦ # donors engaged and giving (social media stats) ◦ Engagement in regional research studies 	<ul style="list-style-type: none"> ◦ Member of good standing of UWCC ◦ Staff operating plans and board workplans include compliance tasks and targets ◦ Performance dashboard identified and adopted ◦ Membership on national committees; participation in shared services, product or service development, membership on local and regional network ◦ Service level agreements where appropriate