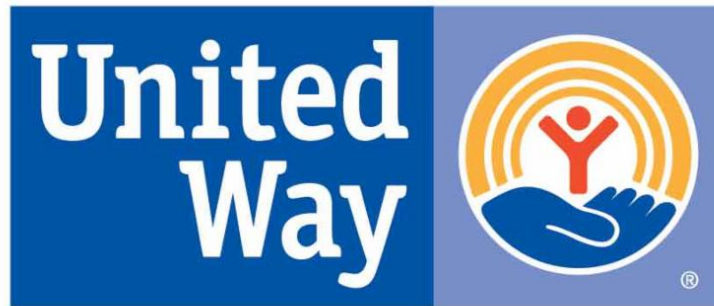


**Heart of Missouri United Way**

**Strategic Plan 2018 - 2021**



## Heart of Missouri United Way

### Strategic Planning: 2018 - 2021

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#### **Mission:**

The Heart of Missouri United Way fights to improve lives in our community.

#### **Vision:**

Our community wins by Living United. By responding to changing community needs. By forging strategic partnerships and fostering effective solutions to tackle local issues. By harnessing the best resources and inspiring others to join the fight in defeating barriers to basic needs, health, education and financial stability.

#### **At Heart of Missouri United Way, we value:**

Trust  
Adaptability  
Equity  
Empathy  
Professionalism  
Perseverance

#### **Value Statement to the Community:**

Raise Money  
Raise Awareness of Community Issues  
Build Capacity

# Vision Goal 1: Advance Community Impact

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## **Strategy 1: Increase Number of Agencies Receiving Funding**

### Action Items:

1. Increase the number of agencies receiving impact funding in 2018.
2. Look for small niche, innovative, entrepreneurial ideas in current proposals to diversify investment portfolio.
3. Develop management system to track performance and outcomes on existing grants and enforce Strategic Initiative Agreements.

## **Strategy 2: Build Number of Certified Agencies**

### Action Items:

1. Increase number of certified agencies in 2018.
2. List potential agencies and create a plan to recruit.
3. Use ANDAR fundraising software to log at least one interaction from each partner agency.
4. Increase Agency Partner Network (APN) engagement by holding two breakfasts and two “happy hour” events with APN members.

## **Strategy 3: Grow Annual Impact Funding**

### Action Items:

1. Increase annual impact funding starting with 2019 budget.

## **Strategy 4: Develop a robust capacity building grant / continuous improvement program**

### Action Items:

1. Successfully complete 3<sup>rd</sup> interim anonymous donor grant report (April 2018).
2. Successfully complete 4<sup>th</sup> and final anonymous donor grant report (October 2018).
3. Successfully implement the MU / IDE capacity building grant as per developed timeline.
4. Take and administer the CCAT 2.0 and use data as a resource for directing strategies based on lowest scoring categories.
5. Use mid- and year-end agency data to help agencies identify opportunities for improvement (OFIs).

## Vision Goal 2: Enhance Internal Improvement

### **Strategy 1: Use Form 990 report to reduce administrative overhead (Expanding Financial Security)**

#### Action Items:

1. Reduce uncollectable Accounts Receivable (A/R).
2. Increase United Way reserves. Starting with 2019 budget create budget line item for reserves.
3. Staff review of Chart of Accounts with Finance and Administration Director to ensure accuracy of expenses.
4. Review existing expenses to identify areas for cost savings.
5. Create Purchase Order (PO) expense approval and Bid processes.
6. Conduct budget review timeline and approval process.

### **Strategy 2: Make Heart of Missouri United Way known as one of the top places to work in the community**

#### Action Items:

1. Move the scores on the Gallup Q12 Engagement Survey (Q2, Q3, and Q10) into the yellow; Maintain scores for Q5, Q7, and Q8.
2. All Staff to retake Q12 Test in (October 2018).
3. Move Q12 score from 4.1 to 4.5.
4. Train all staff on ANDAR, e-Pledge, MIG, CRM (fundraising and other content management software).
5. Staff book – read Covey's *The Speed of Trust* + staff discussion to incorporate lessons learned into work.
6. Review Policies and Procedures with staff.
7. Finance and Administration Manager attends training on how to increase trust and staff engagement with small staffs and conducts a training for staff.
8. Develop two outside-the-office trust building and/or engagement events (Q10).
9. Explore with Marketing Committee how to get nominated for "Best Place to Work."
10. Board increases results of High-Performing Board Survey.
11. Board helps to establish a culture of responsibility with at least one action item after each board meeting.
12. All Board members will serve on at least one committee.

### **Strategy 3: Move toward adopting the Malcolm Baldrige criteria and becoming a Baldrige-based nonprofit organization**

#### Action Items:

1. Development and use of Strategic Plan (SP).
2. Monthly use of SP Dashboard at Board meetings.
3. Monthly SP planning meetings with staff.
4. Develop list of critical processes and map five.
5. Meet periodically with organizations that use the Baldrige criteria for best practices.
6. Distribute Baldrige Excellence Framework to all staff.
7. Introduce Baldrige Criteria / Concepts at monthly staff meetings.
8. Improve donor data collection by determining basic required data fields in ANDAR fundraising software and paper pledge form.
9. Determine a way to improve existing data.
10. Create a report in ANDAR fundraising software that will show data that contributes to the success of a campaign.
11. Research other United Ways with regard to donor data collection and list best practices and create talking points on the importance of data at Heart of Missouri United Way.
12. Executive Committee will advance statewide and national United Way opportunities.

## Vision Goal 3: Advance Community Wide Awareness

### **Strategy 1: Conduct and coordinate a community-wide RFP based on the top issue(s) in our community**

#### Action Items:

1. Continue to engage with Boone Impact Group (BIG) to issue RFP.
2. Facilitate community-wide equity expansion through MU / IDE, Inclusive Excellence Framework, Diversity Awareness Partnership, City of Columbia, and Boone County.
3. Continue BIG's partnership with MU/OSEDA in developing the Boone Indicators Dashboard (BID) to provide partners with a variety of data to address persistent community-wide disparities.

### **Strategy 2: Hold annual events connected to top community needs and/or connected to annual impact funding (Increasing Awareness)**

#### Action Items:

1. Develop a communication strategy for University of Missouri by bringing MU into the fold when increasing awareness.
2. Develop an editorial calendar including timeline for approval (who) and distribution (what) of materials.
3. Increase brand recognition by ensuring each partner agency engages at least once with the United Way brand via social or other media.
4. Conduct public awareness campaign by engaging multiple media forms at least 1x/QTR.
5. Find sponsorship for majority of Community Impact meetings.
6. Review current volunteer structure and engagement for campaign for possible increase in volunteer engagement.
7. Board will personally invest in United Way "swag," and will reference and list their involvement on United Way Board + Use of talking points.

## Vision Goal 4: Increase Revenue

### **Strategy 1: Increase total campaign and overall non-grant revenue**

#### Action Items:

1. Develop alternative campaigns to foster and advance individual giving.
2. Evaluate the idea of developing an unrestricted campaign for agencies.
3. Expand the MU campaign, including expanding and advancing via e-Pledge and expand visibility during campaign to include emails, targets, developed with Tri-Chairs.
4. Add-on campaign event in December.
5. Strengthen and grow Live United Day (LU), Tigers on the Prowl, and Rock Paper Scissors.
6. Board commitment to financially support United Way through the campaign.

### **Strategy 2: Grow the number of Individual Major Gifts, Leadership Circle donors, and ADT donors**

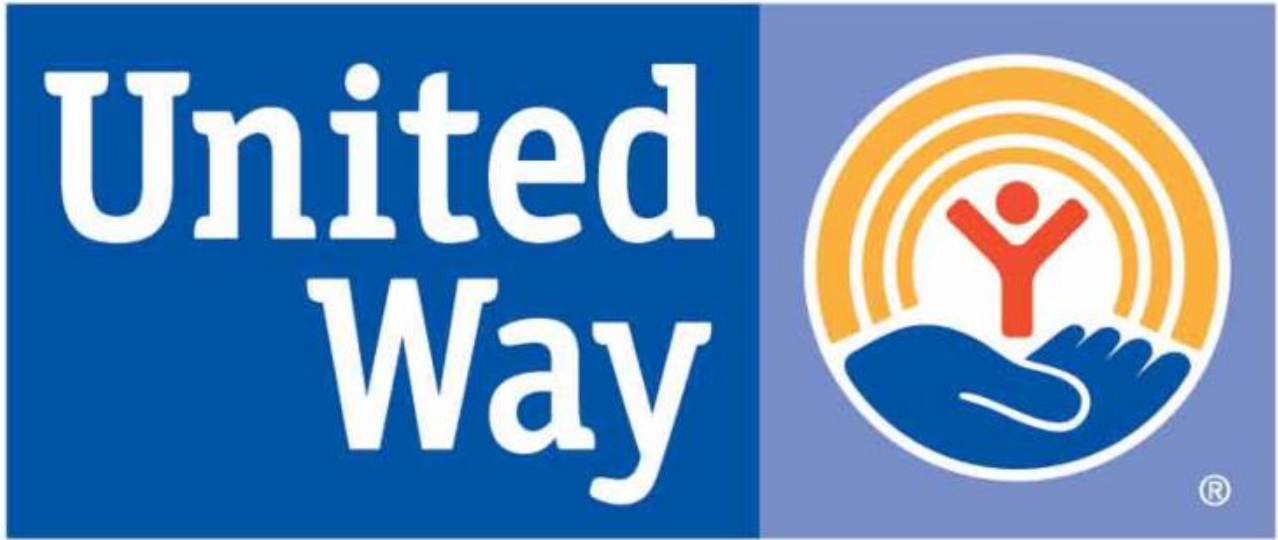
#### Action Items:

1. Increase Leadership Circle membership in 2018 – identify ways to acquire and retain.
2. Increase membership in ADT in 2018.

### **Strategy 3: Increase Support in Company Campaigns**

#### Action Items:

1. Develop and track portfolios for all Research Development staff and Executive Director using top prospects.
2. “Draft Day” for campaign volunteers to be paired with companies.
3. Track unique new members of e-Pledge donors in 2018 over 2017.
4. Further diversify campaign to minimize the top-heavy reliance we have on our top three campaigns.
5. Increase corporate partnership engagement by developing a list of potential corporate sponsors.
6. Use ANDAR fundraising software to log at least one United Way campaign “touch” for each company.
7. Strengthen existing partnerships with companies.
8. Board assists with securing attendance at annual CEO Breakfast.
9. Board assists with growth and advancement of Loaned Executive program.



**Heart of Missouri United Way**