



Local Insights. Lasting Results.

Strategic Initiative Plan 2019-2021

Final Draft 10/11/18

Purpose:

A Strategic Initiative Plan lays out a course of action regarding Community and Internal positions and actions that the Greenwich United Way will follow for the next 3 years.

Methodology:

A Committee was formed: Anne Sherrerd, Current Board Chair; Brook Urban, Chair of Stewardship, Karen Keegan, Immediate past Board Chair, David Rabin, CEO G UW and Jeremy Nappi, Senior Director of Fund Development and Operations G UW

The Board retreat in October 2017 began the process. Surveys and SWOT exercises were held with stakeholders: G UW Board of Directors, Greenwich Agency CEO Roundtable, G UW Community Planning Council, Board of Advisors, Staff. A Board discussion was held at the April Board meeting regarding the continuance of the current funding of multiple agencies or narrowing the focus of the G UW allocation dollars. A consensus emerged that we would stay the same and reevaluate periodically.

Discussions were held within the committee to review the responses to the Surveys and SWOTS. Key areas of concentration were determined. Draft submitted and revised. Presentation to the G UW Board is scheduled for Oct 17, 2018. A vote is anticipated at the November 14, 2018 Board meeting.

Areas of Concentration:

1. Fundraising
2. Community
3. Communication

4. DIP Programming
5. Governance: Compliance, Board Development and Engagement
6. Internal Staffing/Management
7. Financial Oversight
8. Implementation

Fundraising:

Evaluate current fundraising strategies and assess the need for change.

1. Annual Campaign: Review timeline, messaging, percent to total funds raised.
2. Events: Review return on investment for current events, modify if needed. Look at the need to add or delete events as a basis for raising funds.
3. Direct Impact: See DIP Programming section.
4. Continue to capitalize on our positive reputation.

Community:

Evaluate current roles in the community and assess the need for change.

1. Needs Assessment: Review current process. Evaluate the need for more data points in our methodology. We need to increase our response rate.
2. Grant Process: Review process and timeline. Periodically review the question, Do we award to multiple agencies or narrow our focus to a few and award more dollars?
3. Planning Council: Review purpose, goals and effectiveness.
4. Enter into a dialog with competitors in the “grant award” space such as, Impact Fairfield County and others.

Communication:

Review and update current methods of communicating our mission.

1. Review the need for a Communications/Marketing staff position.
2. Develop a marketing Plan to match the Fundraising and Events calendar, yearly.
3. Social Media, evaluate our presence and how should we move forward in a changing technology environment.

4. Complexity of our organization makes it hard to describe, continue to hone an elevator speech.

DIP Programming:

Evaluate current Programs and determine longevity after initial three year commitment.

1. Evaluate each program with these questions in mind. Do we keep programs in perpetuity, spin them off to an agency/partner or help them become their own 501 C3.
2. Evaluate funding needs and develop plans for additional fundraising if needed.
3. Evaluate how to “on board” new Programs through the use of the next needs assessment.

Governance: Compliance, Board Development and Engagement:

1. Review Nominating timeline and process.
2. Evaluate the addition of Youth to our Board roster or add a Junior Board.
3. Review the effectiveness of our Board Orientation and improve if needed.
4. Clearly articulate Financial obligations, and options to fulfill them to Board members during orientation and during the initial nominating process.
5. Review role and obligations for Advisory Board members. Consider whether we should keep term limits in place for Advisors.
6. Strategically review the CEO’s direct involvement in GUW activities, outside boards and committees and fundraising roles.
7. Periodically review and ensure compliance with government regulations, bylaw stipulations and auditor requirements.
8. Review term length for the Executive Committee and Committee Chairs.

Internal Staffing and Management:

Review the current level of staffing and determine additional needs for the future, regarding:

1. Adding a Communications/Marketing staff person.
2. Adding additional Development Staff.

Financial Oversight:

1. Continue to make sure we are fiscally viable.
2. Continue to review our Charity Navigator rating and take steps to improve.
3. Consider 2-3 year budgeting.

Implementation:

1. The Strategic Initiative Committee will develop an Implementation Plan in the first quarter of 2019.
2. The Plan will be reviewed by the Board two times per year and progress recorded.