



**GREENWICH UNITED WAY**  
**GOALS AND TASKS for 2020 – 2021**  
**(See note at end of document\*)**  
***Tasks are noted with an \****

Approved by the Executive Committee  
xx/xx/2020

**I. COMMUNITY IMPACT**

(Community Planning Council, Direct Impact Programs, Grants/Community Investment Process)

**Overall goal: Ensure G UW resources are utilized to achieve the greatest positive impact on our community.**

- 1. Community Planning Council:** build this into a more dynamic, results oriented committee that has specific deliverables over time.
- 2. \*Needs Assessment:** deliver final product for 2020/2021 publication that far surpasses previous versions in usability and quality of information. Publicize it town-wide to deliver the message of the pressing needs in Greenwich through media, meetings, press releases and testimonials of key stakeholders as to its importance to the community.
- 3. Direct Impact Programs:**
  - ECAGS – Continue to work with partners to ensure the program is delivered with fidelity and that it meets or exceeds all criteria laid out by the national organization (PAT). Grow the participation in the program as appropriate. Goal: *Develop new ways to measure success given the challenges of getting data from partners, especially during the pandemic.*
  - YIP – Continue to expand Finance Champions, Math Champions. Look to add other “Champions” programs, as appropriate.
  - \*Continue to collect data and report metrics to relevant parties proving the programs are working and the outcomes expected are being attained.
  - Ascertain if a new Direct Impact program is appropriate as a result of the 2020 Needs Assessment.
- 4. Grants/CIP:**
  - Continue to work with agencies to improve applications and reporting of results as needed.

- \*Post funded agency's results on Dropbox and disseminate a "summary report" to Board and public to raise awareness of value of GUW grants and the outcomes our funding is responsible for.
  - Develop new grants structure (including a new process for scholarship awards for early learning centers) that better addresses the needs as outlined in 2020 Needs Assessment.
5. **New Early Learning Center**
    - \*Complete the installation of a new early childcare provider to take the place of YMCA at St. Roch. Embed GUW PSIC to assist our ECAGS program.
  6. **COVID:** Assist, as appropriate, town agencies and community partners in adapting to the "Covid world".
  7. **Food Insecurity:** Create group that includes organizations that supply / deliver food to better align food insecurity service delivery, thereby preventing redundancies and improving efficiencies.

## **II. FUND DEVELOPMENT & MARKETING**

(Annual Campaign, Events, Direct Impact Fundraising, Marketing/Communications)

**Goal: Provide the GUW and its programs with the funding necessary to meet the needs of our community.**

### **Fund Development:**

1. **Annual Campaign:** Utilize Raiser's Edge reports more effectively to study trends. Identify best practices and implement strategies to increase dollars raised.
2. **\*Events:** Plan and execute Comedy Night, Sole Sisters and Golf fundraisers.
3. **DI:** Plan and execute DI fundraising for ECAGS and YIP for Years 4-6. Fundraising for ECAGS is a TOP priority.
4. **2019-20 Fundraising Targets: \***

Annual Campaign	\$1,145,000
Events	\$465,000
Direct Impact	\$573,000

\* From preliminary budget approved by Board of Directors June 2020
5. **Board involvement:** Evaluate best use of Board leadership to assist staff in fundraising efforts
6. **\*Review status of actual revenue realized vs. budget and address as needed each quarter.**

### **Marketing/Communication:**

1. Continue to develop a marketing plan with staff and marketing consultants to raise awareness and increase fundraising.

## **III. FINANCE**

(Audit, Finance, Board Designated Reserve Fund)

**Goal: Develop annual budget, monitor finances and maintain expense controls to enable the**

**G UW to prudently steward resources and have no issues with annual audit.**

1. \*Continue to closely monitor monthly financials.
2. \*Ensure annual audit is executed in a timely manner.
3. \*Provide regular and effective oversight of the Board Designated Reserve Fund.
4. \*Continue to review our Charity Navigator rating and take steps to improve if appropriate.

**IV. STEWARDSHIP (Board Goals)**

(Governance, Nominating, Officers Nominating, Strategic Initiatives, Human Resources)

**Goal: To ensure the long-term success of the organization by developing forward looking strategies that align with G UW mission and vision.**

1. \*Review Board Handbook and update as appropriate (written in Fall 2017)
  - o Make sure “current practices” are up-to-date.
  - o Reflect year alignment change.
  - o Ensure all board members are aware of handbook and review it.
2. Joint CEO and Board: Begin Strategic Plan development by end of fiscal year.

**V. INTERNAL OPERATIONS & CORE FUNCTIONS (CEO goals)**

**Goal: Ensure that the G UW has the staff, board, and other resources necessary to execute its mission.**

1. Continue to be adaptable in responding to an ever-changing landscape given COVID. Including changing community needs, staff needs, and fundraising strategies.
2. \*Plan for expected move of office in January 2021.
3. \*Maintain expenses at budgeted goal or below.
4. \*Continue to ensure that G UW has proper staffing in place and that staff is functioning effectively.
5. Continue to increase proficiency with financials of the organization.
6. Work with Nominating Committee to recruit a more diverse Board of Directors.
7. Continue community outreach strategy to build on the importance of G UW to the town.
8. Successfully manage day-to-day operations.

**\*COVID-19 Note:**

The goals for 2020-2021 will be impacted by the fluid conditions due to the pandemic. A critical characteristic G UW must possess during this uncertain time is adaptability. The capacity to pivot under the circumstances we will be in for the foreseeable future will be key to any success we experience in our fundraising and program delivery. Also, the ability of our program partners to do the same will impact the success we have.