Five-Year Strategic Plan
2016 — 2020

Improving Lives By Uniting PEOPLE, IDEAS and RESOURCES

United Way of Greater Plymouth County
Strategic Planning Task Force

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Mr. William McCann
Wells Fargo Advisors, LLC

Ms. Beverly Pavasaris
Brockton Visiting Nurse Association

Mr. Kevin T. White, CPA
BlumShapiro
Dear UWGPC friends and supporters,

For nearly 130 years, United Way Worldwide has championed the cause of improving lives by mobilizing the caring power of communities. Nowhere is the continuous advancement of that historic mission more critical than right here — and right now — in Greater Plymouth County. Never before have the challenges facing those we serve been more obvious, and never before has our ability to lend a helping hand — in timely, effective and compassionate ways — been more essential.

We remain absolutely unabashed in our belief that great things can and do happen when we LIVE UNITED, but we are also cognizant of two powerful and simultaneous forces confronting much of the non-profit arena in which we operate: rising public expectations of our responsibility to improve so many facets of the human condition; and mounting limitations on our ability to offer the broadest range of social, economic, health and educational supports to those who are most in need.

Now, however, is not a time to make excuses for what could hold us back. Instead, it is a moment to challenge ourselves to be smarter, bolder and more focused than ever before.

Doing so has required us to reflect deeply upon our organization’s contemporary purpose, affirm its values, and clarify its vision. Taken together, these ideas — and ideals — constitute the core of a groundbreaking and action-laden strategic plan that seeks to energize our passions, channel our energies, and hold us more accountable to our many constituencies.

Numerous community leaders, volunteers and friends of UWGPC have already given generously of their time and expertise in helping us to better understand the full range of what is possible when we LIVE UNITED. So many more will need to be equally tireless in their efforts if this plan is to reach its fullest potential and benefit the greatest number of people.

Thank you for continuing to believe in all that we can, must and will do together.

Sincerely,

Stephen Hall
Chair

Dennis Carman
President & CEO
The integrated strategic planning model utilized by the United Way of Greater Plymouth County (UWGPC) establishes a clear vocabulary of terms and, as shown below, a corresponding hierarchy of guiding questions. Answers to these questions both channel the organization’s strategic energy and further clarify the uniqueness of its identity as a dynamic force within the non-profit arena.

- WHAT is UWGPC’s enduring sense of purpose?
- WHAT distant horizon is UWGPC striving to reach as it does its work?
- WHAT qualities describe UWGPC’s efforts and the people behind them?
- HOW does UWGPC advance its mission and continuously improve?
- HOW does UWGPC respond to changing internal and external conditions?
- WHAT concrete and achievable steps is UWGPC taking to pursue its goals?
- WHAT information does UWGPC need to evaluate its overall progress?
Mission
We unite people, ideas and resources to improve the lives of people in Greater Plymouth County.

Vision
Our efforts are instrumental in making Greater Plymouth County a safe, healthy and well-educated community in which people’s needs are met effectively, respectfully and compassionately.

Values
- **Altruism**: Selfless concern for the welfare of others
- **Hope**: Steadfast belief that inspired work from passionate people can — and does — improve the human condition
- **Integrity**: Ensuring high levels of personal and public trust
- **Community Focus**: Active citizenship and highly responsive to changing needs of those we serve
- **Collaboration**: Knowing that connectivity energizes our efforts
**GOAL STATEMENT**

Directly benefit the lives of people in Greater Plymouth County who are most in need.

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**AREAS OF FOCUS**

1. **Deepening** UWGPC’s understanding of changing regional needs
2. **Supporting and strengthening** programs to improve the income and financial stability of people in Greater Plymouth County
3. **Supporting and strengthening** programs to improve the health of people in Greater Plymouth County
4. **Supporting and strengthening** programs to improve the education of people in Greater Plymouth County
5. **Improving** allocation mechanisms
6. **Broadening** program and service opportunities throughout Greater Plymouth County
**Goal I: Impact**

**ACTION ITEMS**
- **Conduct** formalized regional needs assessment
- **Develop** comprehensive plan to collect outcomes data from funded agencies
- **Integrate** outcomes data-collection tools into allocation process
- **Launch** formal study to better understand key barriers to regional income growth for bottom two income quartiles
- **Expand** role of Plymouth Office and Plymouth Task Force to review the assessed needs and funding impact as well as the proportionality of needs, resource generation and allocations for bottom two quartiles

**METRICS**
- **Funds allocated to improve income/financial stability** (M1-1)
- **Regional population living below poverty level, working poor** (M1-2)
- **Regional homeless population** (M1-3)
- **Funds allocated to improve health** (M1-4)
- **Number of transactions using FamilyWize drug prescription discount cards** (M1-5)
- **Percentage of regional population defined as medically uninsured or underinsured** (M1-6)
- **Funds allocated to improve education** (M1-7)
- **Percentage of eligible regional population graduating from high school** (M1-8)
- **Percentage of regional population with working knowledge of English language** (M1-9)
**GOAL STATEMENT**

Expand and deepen the flow of financial resources that are so essential for improving the overall well-being of the community.

**AREAS OF FOCUS**

- **Building and sustaining** traditional workforce campaigns (F2-1)
- **Building and sustaining** an ongoing program to secure major gifts from private philanthropists (F2-2)
- **Building and sustaining** an ongoing program to secure corporate gifts from area businesses (F2-3)
- **Building and sustaining** an ongoing program to secure grants from private foundations and government agencies (F2-4)
- **Leveraging** credibility and experience of Board members and other key volunteers to expand resource generation (F2-5)
- **Expressing** gratitude to donors in timely and effective ways (F2-6)
Goal II: Investment

**ACTION ITEMS**

- **A2-1** Introduce monthly activity report to inform Board members and other solicitors
- **A2-2** Introduce monthly action plan to coordinate activities of Board members and other solicitors
- **A2-3** Launch “LIVE UNITED 365” program targeting new corporate donors from small businesses
- **A2-4** Identify priority areas and thresholds for major gifts (private, corporate)
- **A2-5** Develop UWGPC collateral materials for major gift solicitations from private philanthropists
- **A2-6** Develop UWGPC collateral materials for corporate gift solicitations
- **A2-7** Establish training program for Board members to ready themselves for solicitation
- **A2-8** Sign agreement with a regional college or university for ongoing assistance with grant-writing
- **A2-9** Establish senior-level internship program focused on identifying leads and grant-writing
- **A2-10** Introduce protocols by which funding recipients personally thank specific donors
- **A2-11** Establish a planned giving program to publicize UWGPC as a worthwhile option for bequests
Goal II: Investment

**METRICS**

- Total financial contributions made to or through UWGPC
- Financial contributions made to UWGPC/LIVE UNITED Fund
- Financial contributions made by Leadership Givers
- Financial contributions designated as Major Gifts
- Financial contributions made to UWGPC/LIVE UNITED 365 Business Circle
- Employee participation rate in UWGPC workplace campaigns

- Total number of individual donors making contributions to or through UWGPC
- Number of individual donors making contributions to UWGPC/LIVE UNITED Fund
- Number of Leadership Givers
- Number of Major Gifts
- Number of regional small businesses making contributions to UWGPC/LIVE UNITED 365 Business Circle
- Number of regional businesses participating in UWGPC workplace campaigns

**GIVING**

8
**METRICS**

**SOLICITATION**

- Number of top 25 regional companies represented on UWGPC Board and/or allocation committees
- Percentage of Board members who have contributed at least two philanthropic leads
- Percentage of Board members who have participated in a UWGPC solicitation

**STEWARDSHIP**

- Percentage of donors who have received personalized thank you from UWGPC Board or staff member
- Percentage of donors who have received personalized thank you from funding recipient

**OTHER RESOURCES**

- Funding from federal, state and local government contracts
- Number of federal, state and local government contracts
- Funding from successful applications to private foundations
- Number of successful applications to private foundations
Forge and strengthen meaningful, lasting and mutually beneficial collaborations with key regional partners.

**Goal III: Connectivity**

**GOAL STATEMENT**

**AREAS OF FOCUS**

- **Collaborating** with other United Ways in Massachusetts to maximize impact and/or minimize overhead
- **Expanding and strengthening** partnerships with other regional organizations focused on improving lives
- **Recruiting** business and civic leaders to be active members of the UWGPC community
- **Leveraging** UWGPC’s inherent strengths as an invested and active community convener to advance public policy
- **Leveraging** UWGPC’s inherent strengths as an invested and active community convener to inspire voluntarism
Goal III: Connectivity

**ACTION ITEMS**

- **A3-1** Begin regular program of convening small, focus-group style discussions with key stakeholders
- **A3-2** Develop action plan to bring the United Way into area public school systems, colleges and universities for purpose of launching student United Way activities
- **A3-3** Formalize partnerships with all regional chambers of commerce and business associations
- **A3-4** Organize and host regional issues forum in which UWGPC is the premier thought leader on issues pertaining to financial stability
- **A3-5** Convene slate of Board-to-Board meeting with other United Ways to discuss regionalization
- **A3-6** Launch #LIVEUNITED365BusinessCircle to connect with local businesses

**METRICS**

- **M3-1** Number of small, focus-group style discussions convened with key stakeholders
- **M3-2** Number of attendees at public forums convened by UWGPC
- **M3-3** Number of area public school systems, college and universities developing student United Way models
- **M3-4** Number of business executives or community leaders who volunteer in various capacities for United Way
- **M3-5** Number of electronic touch points made by chamber and business association CEOs on behalf of UWGPC
- **M3-6** Number of social media mentions of #LIVEUNITED365BusinessCircle
GOAL STATEMENT

**Build** affinity for the overarching United Way mission and **communicate** the positive impact UWGPC has on the people of Greater Plymouth County.

**AREAS OF FOCUS**

- **F4-1** **Ensuring** a steady flow of timely information to all key stakeholders
- **F4-2** **Improving** the public’s understanding of the unique and contemporary role United Way plays in the community
- **F4-3** **Leveraging** the inherent advantages of emerging social media channels
- **F4-4** **Personalizing** impact testimonials to better demonstrate the advancement of the United Way mission
- **F4-5** **Cooperating** with area journalists and media outlets to share the United Way story
Goal IV: Awareness

**ACTION ITEMS**

- **A4-1** Create comprehensive marketing plan
- **A4-2** Expand “Days of Caring” program to fall kick-off and spring event
- **A4-3** Build database of impact testimonials and regularly share them on social media and in newsletter
- **A4-4** Formalize calendar of UWGPC events and activities with area journalists and media outlets
- **A4-5** Set schedule for releasing marketing collaterals and other communications materials to partner agencies
- **A4-6** Conduct annual review of communication strategy and marketing collaterals

**METRICS**

- **M4-1** Percentage growth in trackable social media hits
- **M4-2** Number of unique hits on UWGPC website
- **M4-3** Percentage of UWGPC partner agencies displaying window decals and/or marketing materials
- **M4-4** Number of opens for UWGPC electronic newsletter
- **M4-5** Percentage of recipients opening UWGPC electronic newsletter
- **M4-6** Number of printed collaterals distributed
- **M4-7** Number of unique impact testimonials incorporated into printed and electronic materials
- **Inventory of beneficial media coverage**
  - Qualitative
- **Inventory of impact testimonials**
  - Qualitative
GOAL STATEMENT

Transform the organization to make its efforts more effective, sustainable and specific.

AREAS OF FOCUS

F5-1  Developing the professional skills and talents of the UWGPC staff

F5-2  Strengthening and streamlining governance structure to maximize the effectiveness of Board members

F5-3  Investing in technology and data systems to improve business intelligence

F5-4  Leveraging national United Way resources through United Way Worldwide to improve UWGPC operations

F5-5  Ensuring geographic distribution of effort is equitable and/or strategic

F5-6  Embracing efficiencies to maximize effectiveness, boost productivity or reduce overhead
**Goal V: Optimization**

**ACTION ITEMS**

- **A5-1** Conduct annual review of non-campaign revenue and expenses
- **A5-2** Conduct job audit for each professional position
- **A5-3** Formalize regular schedule of meetings for managers
- **A5-4** Create and/or update administrative policy and procedure manuals (i.e. accounting, data processing and human resources)
- **A5-5** Establish annual training goals across the whole of the organization
- **A5-6** Enhance employee evaluation process by identifying individualized professional development goals

**METRICS**

- **M5-1** Administrative overhead as percentage of total revenues
- **M5-2** Percentage of non-campaign revenues offsetting administrative overhead
- **M5-3** Hours of training for all employees
- **M5-4** Percentage of individual professional development goals met
- **M5-5** Percentage of annual training goals achieved across the whole of the organization
- **M5-6** Percentage of job descriptions that can be considered up-to-date

**FINANCIAL**
Great things happen when we LIVE UNITED!
## OFFICERS & EX OFFICIO MEMBERS

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<tr>
<th>Member</th>
<th>Position</th>
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<tr>
<td>Mr. Stephen Hall, Chair</td>
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<td>Control Point Technologies (Retired)</td>
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<td>Mr. Leo MacNeil, Immediate Past Chair</td>
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<td>HarborOne Bank (Retired)</td>
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<td>Dr. Dana Mohler-Faria, Vice Chair</td>
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<td>Bridgewater State University (Retired)</td>
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<td>Mr. Kevin T. White, CPA, Treasurer</td>
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<td>Mr. Dennis Carman*, President &amp; CEO</td>
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<td>United Way of Greater Plymouth County</td>
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<td>Mr. William McCann*</td>
<td>CPA</td>
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*EX OFFICIO

## AT LARGE MEMBERS

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<td>Ms. Monique Aleman</td>
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<td>Good Samaritan Medical Center</td>
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<td>Ms. Shaynah Barnes</td>
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<td>City of Brockton</td>
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<td>Ms. Barbara Cowgill</td>
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<td>Rockland Trust Company</td>
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<td>Mr. John Doyle</td>
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<td>Ms. Andrea Holleran</td>
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<td>Beth Israel Deaconess Hospital Plymouth</td>
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<td>Mr. Joseph Kameese</td>
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<td>Ms. Laurie Maker</td>
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## PROFESSIONAL STAFF

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<tr>
<td>Ms. Kimberly Allen</td>
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<tr>
<td>Director of Community Relations &amp; Marketing</td>
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<td>Ms. Cindy Gillis</td>
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<td>Director of Finance</td>
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<td>Mr. Richard Noll</td>
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<td>Director of Resource Development</td>
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<td>Ms. Cat Springhetti</td>
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<td>HR &amp; Finance Specialist</td>
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<td>Mr. Joe Travers</td>
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<td>Resource Development Associate</td>
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