



“A Century of Caring for Our Communities” **Strategic Action Plan for 2021-2025**

Introduction

Recognizing the significant challenges and reaching out to steadfast supporters and dedicated community partners, United Way of Greater Plymouth County, The Family Center & Community Connections of Brockton has been working tirelessly to overcome the ravages of the COVID-19 pandemic to find the brighter days that lie ahead.

While our parent organization, United Way Worldwide, has always fought for the health, education, and financial stability of every person in every community, our volunteer Board of Directors and dedicated staff recognize the need to reimagine and rebuild our local community, to pivot from a series of short term, emergency responses to assist our neighbors to longer term strategic solutions aimed at the recovery of our community. We are charting a successful path of effectively caring for those of our neighbors who are most vulnerable and most in need of our help.

United Way of Greater Plymouth County’s vision and mission, though slightly streamlined, remain unchanged. We have, however, embraced the idea of a “modern United Way” that creates measurable impact and improves lives by fighting for the health, education, and financial stability of every person in our community. Our theme for the current year and beyond is “United, We Recover”.

Vision Statement: *“We fight for a safe, healthy, diverse and welcoming community where everyone’s needs are met equitably, respectfully and compassionately.”*

Mission Statement: *“We unite people, ideas and resources to improve lives and to build a stronger community.”*

Though the goals, strategies and objectives presented are organized primarily under “functional” categories, this strategic action plan recognizes and avoids the potential pitfalls of developing “silos” by integrating activities across functional areas and assigning primary and supporting accountability roles. The basic framework employed for the plan will include “people”, “processes” and “technology”.

In addition to the basic framework, there will be an incorporation of a renewed commitment to celebrating diversity by practicing inclusion and insuring equity in all aspects of the work of United Way of Greater Plymouth County. This commitment is captured in our newly created Statement of Diversity, Equity, and Inclusion.

**United Way of Greater Plymouth County
Statement of Diversity, Equity, and Inclusion**

United Way of Greater Plymouth County celebrates diversity among the people we serve and those who serve them. We acknowledge a history in this country where harm, cruelty and injustice were inflicted on people because of their race and/or ethnicity and we understand that this persists today. We denounce racism and oppression in all their forms. Because we know that values without actions fall short, we will uphold our mission to “improve lives” and to “Live United” with a strong commitment to diversity, equity, and inclusion. We will actively and relentlessly work against systemic racism, discrimination, and oppression. We will work together with our neighbors from diverse backgrounds in greater Plymouth County as equal partners to identify and understand their specific and unique needs, and we will generate resources to meet those needs. United Way of Greater Plymouth County will train our staff and volunteers to recognize and undo all acts of systemic racism in order to fight against it at all times and in all instances. We make this pledge as part of a long-term commitment to co-creating meaningful and lasting change with the communities in which we serve.

Our Strategic Planning 2021-2025 Task Force and our Board of Directors have engaged in lively discussions and debates over UWGPC’s direction in the next five years, but there has been clear consensus that we must incorporate the principles of inclusion and equity in the planning and implementation of our work. We must generate sufficient resources and invest them in our community so that all of our neighbors are receiving assistance in accordance with what they need. Systemic racial and ethnic inequities have made it harder for the most vulnerable of our neighbors to get the support they need. Our United Way seeks to change that: we want to reimagine and rebuild healthy, strong, and equitable communities by striving to achieve these six major goals in the next five years:

Summary of Goals

I. COMMUNITY IMPACT: Improving Lives and Strengthening the Community: UWGPC, The Family Center & Community Connections of Brockton will achieve maximum “community impact” by working with community partners to improve lives and strengthen the community by generating resources to meet the most pressing needs through services and systemic change.

II. COMMUNITY JUSTICE: Honoring diversity and eradicating systemic racism by co-creating opportunities with our diverse neighbors to ensure the equitable distribution of resources in meeting our communities’ needs.

III. COMMUNITY INVESTMENT: Expanding financial and human resources for UWGPC, The Family Center & Community Connections of Brockton to maximize community impact by meeting the most pressing community needs of our most vulnerable neighbors.

IV. COMMUNITY BUILDING: Creating partnerships, making connections, and convening the community. UWGPC, The Family Center & Community Connections of Brockton will reach out to and cultivate solid and lasting relationships with critical coalitions, key leaders and other community stakeholders through diplomacy, advocacy and community organizing to optimize outcomes.

V. COMMUNITY TRUST: UWGPC, The Family Center & Community Connections of Brockton will increase the awareness of our supporters and potential supporters in the community regarding the positive impact of the organization’s actions and initiatives in order to strengthen the perceived value of the community in UWGPC’s mission and work.

VI. UNITED WAY COMMUNITY: Optimizing our local UWGPC, The Family Center & Community Connections of Brockton by reviewing, reconfiguring, and realigning administrative operations, personnel, policies and protocols, and technology, in order to ensure efficiency and effectiveness. UWGPC will work collaboratively with our regional United Ways and United Way Worldwide sharing knowledge and resource to better serve our neighbors in need.

Basic Terms

The strategic direction embodied in this action plan are extensions of the key themes generated from SWOT analysis results, interviews with key stakeholders and strategic planning task force meetings

held from November 2020 to May 2021. Before moving to the details of the plan, we need to present definitions of some of its basic elements:

Mission – This is our reason for being – what we do –with/for whom we do it

Vision – What we see as the results of our collective efforts, the difference that our organization makes for the individuals living and working in our communities and for the overall community itself.

Inclusion – We build a culture of belonging by actively inviting the contribution and participation of all people.

Equity – We seek to ensure fair treatment, equality of opportunity, and fairness in access to information and resources for all.

Goals – These are overarching statements of what the organization hopes to achieve over a multi-year period

Strategies – These are well defined approaches or methods for attaining the goals of the organization.

Objectives – These are specific, concrete, measurable statements of what will be accomplished or what will be delivered by the employment of organizational strategies within a specified period of time.

Strategic Plan Goals, Objectives, and Metrics for 2021-2025

This strategic action plan is organized in six targeted areas. Within each of these areas, strategies and objectives are articulated and specific positions and groups responsible for implementation are identified.

Goal I: COMMUNITY IMPACT - UWGPC, The Family Center & Community Connections of Brockton will achieve maximum “community impact” by working with community partners to improve lives and strengthen the community by generating resources to meet the most pressing needs through services and systemic change.

Primary Responsibility

Staff: Director of Community Relations & Marketing

Director of The Family Center & Community Connections of Brockton

Volunteers: Board Community Impact Committee

South Shore Leadership Advisory Committee

Additional Support

Staff: President & CEO

Strategy A: Narrow the focus areas to six or less to clearly identify a set of urgent needs where resources are to be channeled.

Objective 1: Establish a set of five or six needs areas that will be the focus of the United Way's annual campaign

Objective 2: Utilize the same or a very similar list of need areas for the focus of the United Way annual campaign for a minimum of five years

Strategy B: Revise and streamline allocations process to place more emphasis on collaborations between community partners, on systemic, multiyear, solutions to meeting needs, and on developing specific outcome measures on which to evaluate the efficacy of proposed initiatives.

Objective 1: Reduce the scope of the allocations process by reducing the requirements/attachments by a minimum of 20% in the first year.

Strategy C: Transition from a "paper" and "spreadsheet" model to an electronic platform to improve the efficiency of the allocations process.

Objective 1: Convert the allocations application process to be fully electronic by year two.

Strategy D: Direct greater resources and staff/volunteer efforts at The Family Center/Community Connections of Brockton.

Objective 1: Meet 25% match to DCF contract for Community Connections of Brockton

Objective 2: Continue to include The Family Center in the distribution of coats from the Warmer Winters Initiative

Objective 3: Secure corporate sponsorships for South Shore Leadership Conference

Objective 4: Annually apply for funds from the MA Attorney General's Office to support the Local Consumer Program at The Family Center

Objective 5: Develop a list of at least a dozen potential private grant sources for additional services through Community Connections and/or The Family Center

Goal II: COMMUNITY JUSTICE - Honoring diversity and eradicating systemic racism by co-creating opportunities with our diverse neighbors to ensure the equitable distribution of resources in meeting our communities' needs.

Primary Responsibility

Staff: President & CEO

Volunteers: Board Diversity, Equity & Inclusion Committee

Additional Support

Staff: Director of The Family Center & Community Connections of Brockton

Strategy A: Develop, publish, and distribute a clear anti-racism/diversity, equity and inclusion statement providing direction to UWGPC confront and combat racism in all of its forms.

Objective 1: Compose and publish on UWGPC's website a clear statement regarding Diversity, Equity & Inclusion

Strategy B: Establish protocols for UWGPC to ensure that its Board of Directors and Staff and Volunteers reflect the racial/ethnic composition of the community.

Objective 1: Add/amend by laws to include a statement that UWGPC will reflect the general demographics of its service area

Strategy C: Establish mandated foundational training for all members of UWGPC's Board of Directors and Staff regarding diversity, equity, and inclusion.

Objective 1: All members of the UWGPC Board of Directors will receive 4 hours training per year regarding issues of diversity, equity, and inclusion.

Objective 2: All staff of the UWGPC/The Family Center & Community Connections of Brockton will receive 7 hours training per year regarding issues of diversity, equity, and inclusion.

Strategy D: Incorporate new directives/mandates in the allocation process to ensure the equitable distribution of resources to people from diverse racial and ethnic backgrounds.

Objective 1: During year one a small amount of funds from the annual allocations process will be set aside to support and provide technical assistance to initial grassroots efforts of smaller nonprofit organization and coalitions dedicated to assisting people of color.

Objective 2: Changes/additions to the allocations process will require funded partners to track racial/ethnic demographics of people served with United Way funds.

Objective 3: During year two and beyond add the requirement that community partners receiving United Way funds must serve people in need that are reflective of the racial/ethnic composition of the communities they are serving.

Goal III: COMMUNITY INVESTMENT - Expand financial and human resources for UWGPC, The Family Center & Community Connections of Brockton to maximize community impact by meeting the most pressing community needs of our most vulnerable neighbors.

Primary Responsibility

Staff: Director of Resource Development Campaign Associate

Volunteers: Chair of Annual Campaign, Campaign Committee, Leadership Giving Subcommittee

Additional Support

Staff: President & CEO

Volunteers: Board of Directors

Strategy A: To increase the amount of funds raised by UWGPC’s Annual Campaign by 3% each year for the next five years for a total of 15% by directing greater financial and human resources to UWGPC’s fundraising efforts in order to more adequately address the identified need areas of the community.

Objective 1: Increase the annual “net campaign” by 3% each year for the next five years for a total of 15%.

<u>Baseline*</u>	<u>Year 1</u>	<u>Year 2</u>	<u>Year 3</u>	<u>Year 4</u>	<u>Year 5</u>	<u>Total</u>
\$883,757	\$910,270	\$937,578	\$965,705	\$994,676	\$1,024,516	\$140,759

*Due to the pandemic the baseline was calculated by taking an average of the past two years of the net campaign.

Objective 2: Reduce the amount of donations designated to other nonprofit organizations by 5% over the next five years by emphasizing the importance of donating to the “LIVE UNITED” (undesignated) fund.

Objective 3: Develop a list and approach 25 prospective new companies each year for the next 5 years (125 companies) in order to add 32 new companies to the campaign over the next 5 years:

<u>Current</u>	<u>Year 1</u>	<u>Year 2</u>	<u>Year 3</u>	<u>Year 4</u>	<u>Year 5</u>	<u>Total</u>
109	115	121	127	134	141	+32

Objective 4: Develop a written leadership giving plan that identifies leadership donors by giving level and specifies strategies to increase the numbers in each giving level. The leadership plan shall include a proposed Increase both for the number of leadership givers at each level by 3% over the next five years for the Bronze and Silver Levels. The leadership plan shall include a “Major Gifts” component that will increase each of the upper categories of leadership giving, Gold, Platinum and Tocqueville by one giver each year for the five years of this strategic plan.

Objective 4 Continued:

<u>Level</u>	<u>Current</u>	<u>Year 1</u>	<u>Year 2</u>	<u>Year 3</u>	<u>Year 4</u>	<u>Year 5</u>	<u>Totals</u>
Bronze (\$500-999)	133	137	141	145	149	153	+20
Silver (\$1,000-2,499)	51	53	55	57	59	61	+10
Gold (\$2,500--4,999)	6	7	8	9	10	11	+5
Platinum (\$5,000-9,999)	2	3	4	5	6	7	+5
Tocqueville (\$10,000+)	2	3	4	5	6	7	+5
Totals	194	203	212	221	230	239	+49

Objective 5: In recognition of UWGPC celebrating its 100th year of service to the community, UWGPC will introduce a new leadership category, “The Century Club” for any donor giving \$100/month or more for 12 months, \$1,200 or more each year.

Objective 6: Establish a United Way “Planned Giving Program” to increase donations through bequests, legacy gifts, and estate donations.

Objective 7: Require all resource development staff and other staff engaged in resource development activities to undergo routine training on Andar.

Objective 8: Add part time Resource Development Assistant position

Objective 9: Increase the number of campaign volunteers to staff Campaign Cabinet, Leadership Giving Subcommittee, and to conduct campaign presentations and other campaign related activities.

Strategy B: Significantly increase government funding and private foundation grants to support The Family Center, Community Connections of Brockton and Other UWGPC Initiatives.

Objective 1: Monitor state contract opportunities, especially through the Department of Children and Families, for expanded contract funding and new funding opportunities as well as through other related state departments, including Department of Public Health, Department of Mental Health, Attorney General’s Office.

Objective 2: Research and establish a list of community foundations and private foundations to apply for 5 to 10 private foundation grants each year for the next 5 years. Grants may be for existing or expanded services at The Family Center or for community convening or capacity building related to the identified five major needs areas.

Objective 3: Maintain and expand as opportunities present themselves the role of “fiscal agent” for community groups and coalitions.

Responsible parties: Present & CEO, Director of The Family Center & Community Connections of Brockton, Director of Community Relations & Marketing

New Partners: New Leadership Giving Subcommittee of Campaign, Select Leadership Givers

Goal IV: COMMUNITY BUILDING - Create partnerships, making connections, and convening the community. UWGPC, The Family Center & Community Connections of Brockton will reach out to and cultivate solid and lasting relationships with critical coalitions, key leaders and other community stakeholders through diplomacy, advocacy and community organizing to optimize outcomes.

Primary Responsibility

Staff: President & CEO

Volunteers: Board of Directors

Additional Support

Staff: Director of The Family Center & Community Connections of Brockton

Strategy A: UWGPC, The Family Center & Community Connections of Brockton will continue active involvement and expand it involvement in community coalitions aligned with the identified, more focused community need areas as well as with the prevention of child abuse and neglect.

Objectives: Continue active involvement in:
Brockton Area Hunger Network
Plymouth County Emergency Food & Shelter Program Board
South Shore Network to End Homelessness
Greater Brockton Health Alliance

South Shore Community Partners in Prevention
Community Services of Greater Brockton
Greater Plymouth Council of Human Service Agencies
Local Police Departments
Brockton Interfaith Coalition
Plymouth County Outreach
South Shore Leadership Advisory Council
Southeast Volunteer Council
Rotary Club of Plymouth
Massachusetts Nonprofit Network

Strategy B: UWGPC, The Family Center & Community Connections of Brockton will join and become actively involved in new community coalitions with an emphasis on those that represent people from diverse racial and ethnic backgrounds.

Objectives: Join and become actively involved in:
City of Brockton Health Equity Task Force
Massachusetts' Children's League
Plymouth Area Chamber of Commerce
Metro South Chamber of Commerce
Cranberry Chamber of Commerce
South Shore Chamber of Commerce
Rotary Club of Brockton

Strategy C: Seek additional opportunities to convene / facilitate public forums, task forces, coalitions or other gatherings that are aiming to address urgent community needs.

Goal V: COMMUNITY TRUST: - UWGPC, The Family Center & Community Connections of Brockton will increase the awareness of our supporters and potential supporters in the community regarding the positive impact of the organization's actions and initiatives in order to strengthen the perceived value of the community in UWGPC's mission and work.

Primary Responsibility

Staff: Director of Community Relations & Marketing

Volunteers: Marketing & Communications Committee

Additional Support

Staff: President & CEO

Strategy A: Establish a volunteer "United Way Ambassadors Team" (4-6 members) in Brockton and Each of UWGPC's 20 Towns in Greater Plymouth County. Members can be recruited from UWGPC leadership givers who reside in each of the respective towns.

Strategy B: Connect with all of the region's Community Cable Access providers to develop UWGPC Info PSAs to be regularly broadcast on local cable channels in order to increase the "visibility" of UWGPC

Strategy C: Increase the frequency and volume of social media posts and traditional press releases

Strategy D: Design and distribute special 100th Anniversary messages regarding UWGPC, including stories of success and testimonials of influential leaders from the community.

Strategy E: Request corporate partners and community stakeholders display UWGPC logos and statements of support for UWGPC on their websites

Goal VI: UNITED WAY COMMUNITY - Optimize our local UWGPC, The Family Center & Community Connections of Brockton by reviewing, reconfiguring, and realigning administrative operations, personnel, policies and protocols, and technology, in order to ensure efficiency and effectiveness. UWGPC will work collaboratively with our regional United Ways and United Way Worldwide sharing knowledge and resource to better serve our neighbors in need.

Primary Responsibility

Staff: President & CEO, Director of Finance & Human Resources, Finance & HR Assistant

Volunteers: Board Finance Committee, Board Governance Committee

Additional Support

Staff: President & CEO

Strategy A: Develop and annually update a “succession plan” that includes the possibility of a transition of UWGPC’s President & CEO, Board Officers and / or members of UWGPC’s Leadership Team.

Strategy B: Develop and annually update a “technology plan” to include improvements to the telephone/communications systems, desktop & laptop computers, antivirus, malware and ransomware protection, as well as timely software upgrades.

Strategy C: Reduce the overall percentage of overhead/administrative costs of the organization to below 21.5% with the next five years.

Current	Year 1	Year 2	Year 3	Year 4	Year 5	Total
24%	23.5%	23%	22.5%	22%	21.5%	(2.5%)

Strategy D: Establish a “Leadership & Professional Development Plan” that includes specific target areas for each UWGPC staff person utilizing free and low-cost training opportunities from UWW, DCF, MNN and other related organizations.

Objective 1: All annual “flex credits” offered by UWW shall be fully expended each year. Training from UWW shall be open to all staff with requests by staff directed to staff supervisors and recommendations on specific trainings for specific staff being made by supervisors to the President & CEO.

Objective 2: Notice of DCF, MNN or other state and local training opportunities shall be distributed to staff in a timely manner. Efforts shall be made to “cross train” staff in different areas of responsibility/departments to expand the skill sets of all staff.

Strategy E: Routine review of salaries and compensation shall be undertaken to ensure competitive wages and benefits for successful recruitment and retainment of quality staff.

Strategy E: An annual “Budget & Contracting” Schedule will be devised and followed to insure the timeliness and improved coordination of the budgetary processes of the organization

Strategy F: UWGPC should remain open to conversations regarding possible mergers and/or strategic alliances between regional United Ways and other local UWs throughout Massachusetts.



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