



2020

# STRATEGIC PLAN



United Way  
of Buffalo & Erie County



Dear Friends,

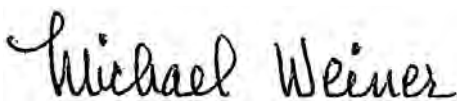
In September of 2019, our United Way began a collaborative process to update our Strategic Plan. We sought feedback from current and former donors, community leaders, and nonprofit partners about our role in the community and how we can best meet the challenges of a dynamic and changing future. With the guidance of a 30-member Task Force drawn from a diverse group and led by Steve Bell of Steve Bell Communications and Dr. Katherine Conway-Turner, President of Buffalo State College, we took the feedback we heard and the data we collected and charted a new course for the organization moving forward.

As the details of our new Mission, Vision, Values and strategic priorities took shape, what became clear was that fundamentally, why we exist has not changed. However, the environment in which we exist has changed dramatically over time. Competition in the marketplace for fundraising opportunities and significant changes through tax reform require us to develop deeper relationships with all segments of our community to create systemic change and to reach current and future donors who want to be a part of that change. More than ever, it is imperative that we sharpen our focus and more clearly articulate our unique value as a convener and collaborator in creating systemic change that improves quality of life for everyone. Most importantly, we must ground our work more deeply in a commitment to equity so that all members of our community have an opportunity to thrive.

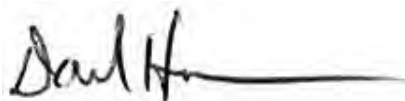
As we prepared to finalize the Plan outlined in this document, our community - along with our nation and the world - was stopped in its tracks by the COVID-19 pandemic. In the weeks that followed, we worked alongside community service providers, individual donors, corporations, organized labor, foundations, and government sectors to mobilize resources in response to emergency needs and serve as a resource on behalf of the community. In the midst of our work to address this crisis, it became clear that our efforts were both informed by and reflective of the Mission, Vision, Values, and priorities outlined in this new Plan.

We want to express our profound gratitude to each and every member of our community who had a hand in creating this Plan - the special Task Force assembled for this purpose, our staff, Board of Directors and Advisory Council; every member of our community who responded to a survey, participated in a focus group, or took the time for an individual interview. Your input will shape our future for years to come and we look forward to engaging a broad range of key stakeholders in the work of the United Way to achieve our new Mission: to bring people, organizations and resources together to create systemic community change.

Sincerely,



Michael Weiner  
President & CEO



David Hore  
Board Chair

# OVER 100 YEARS OF LIVING UNITED

---

## MISSION

---

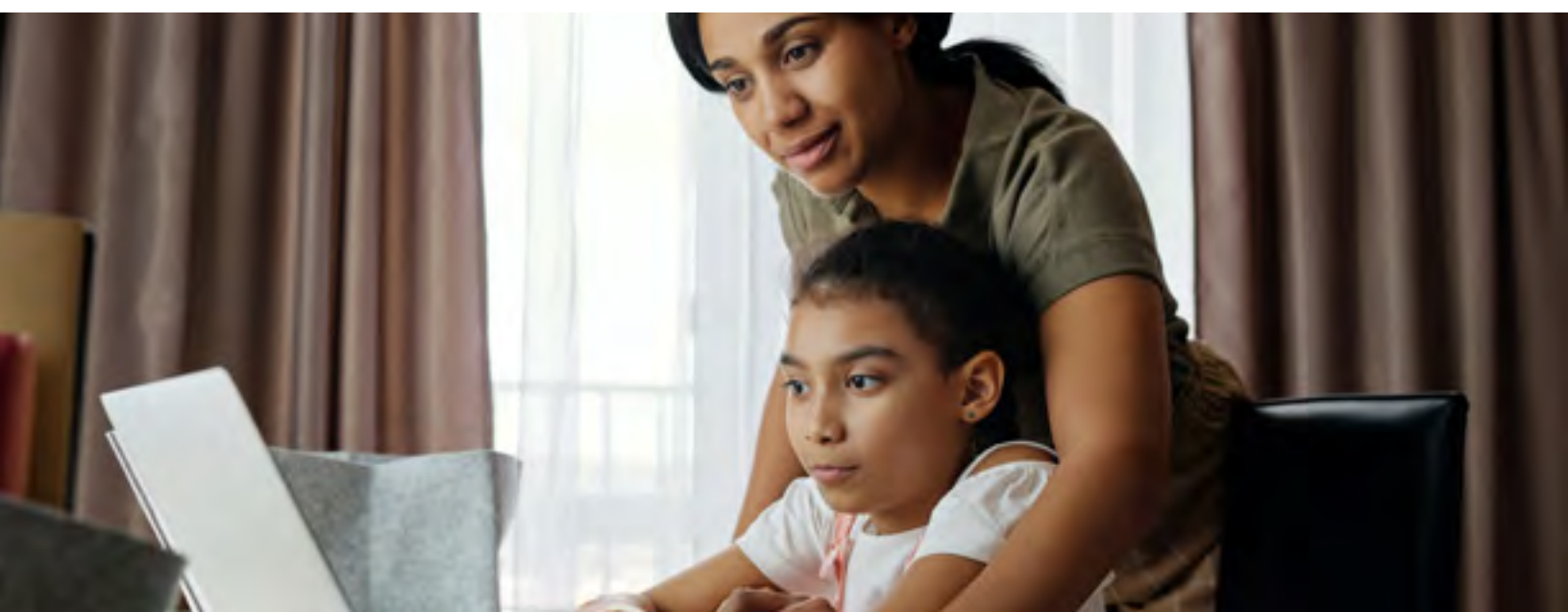
We bring people, organizations and resources together to **create systemic community change**.

## VISION

---

NEW

We envision an equitable, thriving and united community achieved through collaborative leadership.





# VALUES

**Accountability** | We meet our commitments and deliver high-quality, high-value results.

NEW

**Agility** | We foster a culture of responsiveness and flexibility conducive to innovation in every area of the business.

**Collaboration** | We actively include and engage all members of the community so that our work can be informed and enriched by diverse experiences and perspectives.

NEW

**Equity** | We ensure that our policies, practices, and distribution of resources prioritize historically marginalized communities so that all members of our community thrive.

**Integrity** | We are transparent, honest, dependable and trustworthy in every interaction and as stewards of resources.

**Service** | We ensure that all of our work is for the good of others, both within the organization and in the community.



# ABOUT THIS STRATEGIC PLAN

---

This strategic plan does not outline changes in **what we do**, but rather a fundamental shift in **how we do our work**.

In creating this plan, our first step was to conduct a frank examination of the challenges facing the world of charitable giving in this time of great need. That process reinforced our purpose, our mission, and the fact that we fill a critical role by **bringing people, organizations and resources together**. We also heard that our work must go beyond improving community well-being to **creating systemic community change**, and so we updated our Mission statement to reflect this renewed focus.

With this updated Mission, the community leaders on our strategic planning task force helped us articulate our vision of the future—where do we want to be?

We want **equity**.

We want the community to **thrive and be united**.

We believe that the way to achieve that is through **collaborative leadership**.

Our updated Vision reflects that future.

The next phase of our planning process required our internal leadership team to identify the work that we would need to do to achieve this Mission and deliver the Vision. It became clear that first we must intentionally transform our culture and structure and align resources to support this work.

Values create and reinforce organizational culture, and our new Vision and focus on systemic change naturally led us to add **Equity** and **Agility** as guiding principles. We are committed to ensuring that our policies, practices, and distribution of resources prioritize historically marginalized communities so that all members of our community thrive. And we know that the work we have ahead of us requires us to act quickly, so we will foster a culture of responsiveness and flexibility conducive to innovation in every area of our business model.

United Way of Buffalo & Erie County is committed to achieving these strategic priorities and demonstrating these values so that we can one day say that we brought the people, organizations and resources together to create the systemic change that has made Buffalo & Erie County an equitable, thriving and united community.

# STRATEGIC PRIORITIES

The strategic priorities outlined below require an intentional transformation of culture, structure and resources toward a more nimble organization that thoughtfully engages the entire community in developing strategic, iterative solutions that lead to systemic community change.

As noted earlier, why we exist has not changed. What has changed is the environment in which we exist. This is a mandate for United Way to evolve into a dynamic and forward-thinking organization in order to meet the challenges before us.

Woven through our strategic priorities are elements identified as crucial to enhancing the organization's value and continued impact. Some of these are clearly articulated within the priorities; others will be embedded in our annual business plan. These core elements are as follows:

- **Equity/Inclusion:** not only in our work in the community, but within our internal operations
- **Advocacy:** convening the community to strategically influence public policy
- **Systemic Change:** aligning resources to transform systems to better serve people
- **Community Impact:** taking multiple approaches to solve community issues
- **Sustainability:** ensuring long-term viability of ourselves and our partners
- **Developing internal capabilities** in Communications and Data Analytics to ensure we are resourced and aligned to achieve our vision

All future initiatives, innovative approaches, and performance outcomes will be prioritized, resourced, and assessed with these elements in mind.



# STRATEGIC ORGANIZATIONAL GOALS

## PRIORITIZE AND ADDRESS EXISTING AND EMERGING COMMUNITY NEEDS

Provide leadership, experience and resources to identify and support evolving community needs with a focus on historically marginalized communities.

- Identify community needs through qualitative and quantitative data collection.
- Engage a diverse range of current and future stakeholders and collaboratively design solutions that are inclusive, flexible and continuously improving.
- Strategically align resources with community needs.

## SUPPORT THE NONPROFIT SECTOR

Leverage expertise, connections, resources and relationships in support of the nonprofit community.

- Deliver targeted technical assistance, utilizing internal expertise, that addresses specific needs identified by existing data and input from nonprofit partners.
- Connect for-profit and nonprofit sectors by linking community expertise and resources.
- Regularly evaluate the effectiveness of technical assistance and other nonprofit supports provided.
- Implement sustainable mechanisms for donors to support their chosen nonprofits.

## DELIVER BEST IN CLASS EXPERIENCES

Develop and nurture relationships by creating holistic, easy and contemporary experiences for all constituents.

- Develop internal processes and culture characterized by a hospitality mindset.
- Implement user-friendly and contemporary tools that facilitate giving and volunteer engagement.
- Offer compelling and engaging opportunities for people to participate actively in our work year-round.
- Align all revenue generation and engagement strategies to our priorities.

# FOUNDATIONAL PILLARS

## UTILIZE DATA-DRIVEN, EQUITY-INFORMED DECISION MAKING

Better utilize data to inform both who we are in the community and how we do our work internally.

- Identify and invest in the resources, systems, tools and processes across the organization to collect, analyze and utilize the information we need to be truly data-driven.
- Leverage our existing and newly developed data to align our activities against our priority areas and inform us regarding ROI.

## STRENGTHEN ORGANIZATIONAL COMMUNICATIONS

Drive alignment between communications strategies and core organizational priorities.

- Utilize data to develop and standardize organizational communication strategies.
- Identify and invest in the resources, systems, tools and processes to increase the effectiveness of the United Way message.



# STRATEGIC PLAN TASK FORCE

---

**Steve Bell (Co-Chair)**

Steve Bell Communications

**Felicia Beard**

Community Foundation for Greater Buffalo

**Angela Blue**

NYS AFL-CIO/WNY Area Labor Federation, AFL-CIO

**Christina Brozyna**

M&T Bank

**Trina Burruss**

Northwest Bank

**Dr. Lorrie Clemo**

D'Youville College

**Anne Constantino**

Horizon Health Services

**Dr. Katherine Conway-Turner (Co-Chair)**

Buffalo State College

**Cletis Earle**

Kaleida Health

**Matt Enstice**

Buffalo Niagara Medical Campus

**Steve Finch**

AAA of Western and Central NY

**Kawanza Humphrey**

KeyBank

**Marijke Kemble**

Marijke Ocean Joy Coaching & Consulting

**Tom Lynch**

Goodwill of WNY



# OUR SINCEREST THANKS TO OUR COMMUNITY MEMBERS WHO HELPED US FORM THIS STRATEGIC PLAN.

**Sam Magavern**  
Partnership for the Public Good

**Brendan Mehaffy**  
City of Buffalo - Office of Strategic Planning

**Maya Meredith**  
Buffalo Prep

**Matt Pelkey**  
Colligan Law LLP

**Odie Brant Porter**  
Odie Porter Consulting

**Dr. Ramona Reynolds**  
Buffalo Public School District

**Kate Roach**  
New York State Supreme Court

**John Rodgers**  
Independent Health

**Luis Rodriguez**  
Rodriguez Construction Group

**Kyle Rogers**  
BlueCross BlueShield of Western New York

**Michael Ulbrich**  
Self-Employed Consultant

**Matt Wagner**  
Delaware North

**Maria Whyte**  
County of Erie

**Dr. A Scott Weber**  
University at Buffalo

## UNITED WAY OF BUFFALO & ERIE COUNTY STAFF

Melodie Baker	Laura Caley	Jennifer Owen
Katie Buseck	Patty Olender	Christy Panagakis, PhD



## **United Way of Buffalo & Erie County**

742 Delaware Avenue  
Buffalo, New York 14209

[www.uwbec.org](http://www.uwbec.org)

     @uwbec