2015–2020
Strategic Plan
United Way of Buffalo & Erie County
EVERY PERSON IN OUR COMMUNITY HAS THE OPPORTUNITY TO ENJOY THE HIGHEST POSSIBLE QUALITY OF LIFE.
Mission
United Way brings people, organizations and resources together to improve community well-being.

Vision
Every person in our community has the opportunity to enjoy the highest possible quality of life.

Values
Service | We foster/encourage the active involvement of individuals, groups, organizations, corporations and labor in our work of serving the community with high-quality and high-value human services.

Integrity | We are honest, ethical and transparent as we serve. We are advocates of individual worth and self-respect, and caretakers of our donors’ resources.

Collaboration | We work together productively, as an organization and with our partners throughout the community. We value diversity and strive for inclusion. We respect the dignity, uniqueness and intrinsic worth of every person.

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

Innovation | We look for ways to achieve our mission through the creativity of our staff, volunteers and community stakeholders.
In 2010, United Way of Buffalo & Erie County developed a strategic plan designed to transform the organization after a period of declining revenues and the erosion of its relevance in the community. The strategic goals outlined in that plan, and the annual business plans derived from those goals, led to a turnaround in our resource development efforts and significant achievements in community impact and organizational development.

We made significant gains in resource development, reversing a 10-year trend of declining campaign revenues with year-over-year growth over the past five years. We grew nontraditional revenue sources, including checkout scanning campaigns and our annual Spring It On online giving event, and increased focus on grants and endowment led to significant gains.
UNITED WAY IS A COMMUNITY ORGANIZATION, AND ULTIMATELY OUR SUCCESS IS DRIVEN BY, AND ON BEHALF OF, OUR COMMUNITY.
In Community Impact, we completed a comprehensive needs assessment and used the data to inform our community investments process. We also substantially expanded our community engagement opportunities and implemented new programs, including Business Meets Community and the annual Community Baby Shower. In addition, we instituted an advocacy committee for the first time and developed an advocacy agenda to guide strategic engagement with public officials and others toward policy change on behalf of our community’s most vulnerable citizens.

Our organizational development efforts led to the implementation of an annual business planning process to maintain accountability and focus on achieving our strategic goals. We also implemented Salesforce as our organizational Constituent Relationship Management system, and enhanced our board governance processes and procedures to maximize the effectiveness of our volunteer leadership.

As we approach our 100th year of service to Erie County, our second century brings new challenges as well as opportunities to build on successes. This strategic plan sets a direction for the next five years that will enable us to continue to build our relevance in the community by:

• Continuing to diversify revenue streams beyond traditional sources, enhancing techniques to grow discretionary giving that respond to the changing workplace environment, and developing enhanced techniques to grow undesignated giving

• Establishing lasting relationships with affinity groups like young, emerging leaders

• Transforming donor relationships from workplace-based to lifetime, individual relationships

• Assessing community needs, sharpening our community impact focus, and prioritizing action to ensure greatest effectiveness

• Strategically investing financial and human resources against priorities

• Innovating and using new technology to solve community problems, enhance relationships and increase efficiency

United Way is a community organization, and ultimately our success is driven by, and on behalf of, our community. We are profoundly grateful to all those who provided input to our planning process, and especially to all those whose generosity as donors and volunteers has built our organization into what it is today—and all those who will support and nurture it over the next 100 years.

Dennis Elsenbeck  
Chair, Board of Directors

Michael Weiner  
President and CEO
As we look to the next five years, we must address key challenges to grow our resources to achieve our mission. Generating funds for our focused set of priorities requires enhanced attention to undesignated giving. Workplace campaigns have been the cornerstone of United Way’s resource development efforts for nearly as long as the organization has existed. While they are undeniably important, we must build on innovative fundraising strategies and alternative revenue streams. At the same time, we must also broaden our donor relationships. Engaging people on an individual level will enable us to create relationships based on shared priorities that will endure beyond the bounds of the workplace, and transform our ability to engage people as partners in our work.
Optimize Our Fundraising Capability

We will grow our traditional workplace fundraising model through proven best practices and innovative strategies with a focus on undesignated giving. We will enhance retention of workplace donors, increase market share in corporate giving and small business sectors, and strengthen our relationship with organized labor partners.

Diversify Our Revenue Streams

We will create new opportunities for online giving and engagement, and aggressively pursue new sources of revenue through targeted, strategic grant development. We will also maximize existing nontraditional fundraising strategies that drive additional discretionary resources. Legacy giving to the organization’s endowment will continue to be a major focus of resource development efforts.

Develop and Nurture Individual Donor Relationships

United Way will develop a deeper understanding of our donors’ interests and tailor our communication strategies to increase understanding and participation in our priority action areas. We will create lifelong relationships with existing donors, align with donors who share our priorities, and actively pursue key market sectors—including millennials—through targeted community engagement and fundraising opportunities that clearly link to our priority service areas and deepen their engagement in our work.
United Way’s focus areas of Education, Financial Stability and Health & Wellness—three critical aspects of high quality of life—are broad and inextricably linked. We will continue to engage in research and analysis to determine where our resources are best directed within these focus areas to create change.

Our role as a community convener allows us to be a catalyst for action based on research. Through coalition leadership and advocacy, we have built relationships across sectors—with policymakers, the business community, service providers, other funders—and we must build on that work.

Collective community impact can and will occur when there is community readiness—willing, engaged stakeholders with a shared vision applying resources toward a common goal. United Way’s unique value is our ability to lead collective impact to achieve results that improve well-being for our entire community.

Goal Two

Research Conditions and Prioritize Action to Achieve Collective Community Impact
Assess Erie County's Changing Needs
United Way will apply evidence and data to identify the community’s priority health and human service needs, publishing regular reports on areas of critical importance that include data, analysis, best practices, and recommendations for community action.

Prioritize, Advocate For and Lead Community Action
Based on our research and analysis, we will build a focused agenda for change in the areas of Education, Financial Stability and Health & Wellness and lead the community toward transformation. We will advocate for a clearly defined set of issues at the federal, state and local levels to drive policy change. We will convene corporate, government, organized labor and nonprofit partners in coalitions with clearly defined strategic and action plans that incorporate both best practices and innovation to create measurable results. We will support the nonprofit community in achieving our shared goals through capacity-building activities, including but not limited to training and technical assistance. We will also engage the community, including individuals and corporate partners, through meaningful volunteer opportunities that tie directly to our service priorities.

Strategically Invest Resources in Priority Action Areas
We will shift our resources to achieve our goals against prioritized community risk factors. Such resources include program funding through the biennial community investments process, coalition leadership, training and technical assistance, volunteer engagement, grant development and staff talent. Our resource investments will be based on research, the viability of potential solutions, availability or lack of alternative resources, community readiness, and the generation of meaningful results.
United Way is committed to being a high-performance organization. Operationalizing continuous improvement, nurturing critical core competencies, and upholding our values will help us ensure integrity in alignment and success against our strategic plan. Technology is a key partner in success. By leveraging existing resources and adopting innovative solutions, we can streamline our processes, more effectively share and use information, and better engage the community in our work. Most importantly, we must transform the United Way brand experience from an annual transaction to ongoing engagement with our community through giving, advocating and volunteering year-round.
Improve the United Way Brand Experience

We will communicate United Way’s unique value in our community to foster public understanding and utilize traditional and emerging channels in communicating our message. We will provide clear and compelling opportunities for individuals and corporate partners to engage in our strategic priorities through giving, advocating and volunteering, and ensure that our supporters are recognized for their contribution to the achievement of our goals.

Align Resources, Foster Accountability and Strengthen Core Competencies

United Way will routinely evaluate its current organizational structure, technology and budget against progress toward our goals, and align our internal resources to maximize results. We will foster accountability through our annual business and employee performance plans, which will be rigorously developed and evaluated against progress toward our articulated priorities. We will develop and adopt a set of key competencies shared by staff and volunteers to maximize the achievement of our strategic goals. These competencies will be fostered through professional development, coaching and opportunities for cross-functional collaboration.

Apply Technology for Innovation and Continuous Improvement

United Way will continue to actively apply existing and emerging technologies in support of the achievement of our priority goals and objectives. These technology solutions, based on recognized industry standards, will include innovative fundraising applications, internal and external tracking/reporting dashboards, volunteer engagement tools, advocacy applications, and social media and other communication channels.
Thank you

This strategic plan would not exist without significant input from community members—donors, volunteers, service providers, funders, businesses, members of organized labor, and other stakeholders who share our commitment to quality of life in Erie County. We are grateful for their input and guidance and proud to share this plan that will guide us as we begin our next 100 years. We also owe a tremendous debt of gratitude to our senior volunteer leadership—our board of directors and advisory council, whose counsel shapes our strategies at the highest level.

Our community’s renaissance is undeniable, but it must be shared by all if it is to be authentic. We are committed to achieving the goals set forth in this strategic plan so that every resident of Erie County has the opportunity to participate fully in our community’s vibrant future.
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We express our sincere appreciation to our senior volunteer leadership, whose guidance helped shape this strategic plan.

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