

# Strategic Plan

2017



**United Way**  
Prince Edward Island

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# Our Mission

The United Way of PEI's mission is to improve the lives of Islanders and build community by engaging individuals and mobilizing collective action.

## Values

- accountable, open and transparent
- collaborative, trusted partner
- good steward of community investment
- vocal supporters of programs and charities on PEI
- a voice and advocate for Islanders' needs
- a leader in making a difference in the lives of Islanders through our attitudes and practices

# United Way of PEI

Since 1962, the United Way of PEI has been improving lives and building stronger communities across PEI, working collaboratively with stakeholders, partners, volunteers, and donors. We are a registered charitable foundation governed by a volunteer Board of Directors, with a small staff and many volunteers. We work with communities to prevent and address issues that increase vulnerability in Island populations, in ways that empower and support Islanders and increase a sense of community. We measure our success not in dollars raised, but in actual lives changed.

## **United Way Centraide**

United Way of PEI is a member of United Way Centraide, a federated network of over 100 local United Way offices. Each United Way is registered as its own non-profit organization and governed by an independent local volunteer-led Board of Directors. Our membership with UWCC enables us to share, learn, and be inspired from a national network of social impact leaders which can be leveraged to support our local work.

## Focus Areas

We have 3 priority impact areas which guide our community investment:

- **Poverty to Possibility** - meeting the basic needs of our province's most vulnerable people, giving every Islander the opportunity to realize a better future.
- **All That Kids Can Be** - giving children and youth across PEI the support they need to get a great start in life, do well in school, and reach their full potential.
- **Strong and Healthy Communities** - creating vibrant neighbourhoods and communities, where everyone experiences a sense of belonging and connection to one another.

# Strategic Planning Process

In the fall of 2016, United Way of PEI contracted Winding Path Inc. to lead us through a collaborative strategic planning process. The process involved stakeholder engagement through workshops in Summerside and Charlottetown and a stakeholder survey.

In total, fifty-seven (57) stakeholders, including community partners, donors and volunteers engaged in these phases of the planning process. During the next phase, the board and staff participated in a collaborative process to incorporate stakeholder feedback on values, priorities and ideas into a United Way of PEI Statement of Values which informed the identification of key components of strategic focus.

The collaborative nature of the process has resulted in a new and exciting direction for our organization. This new direction would not have resulted without the feedback we received from our stakeholders. We are so grateful for the engagement we've had from all of those we work with to make our community great.

# What We Learned

We gained valuable insight from our stakeholders. We heard that our donors want to know where their money goes and they want to understand how it helps their communities. We learned that our community partners – the organizations working in communities to meet the most pressing needs - sometimes feel alone. We heard that they continue to need funding for their work, but we also learned that they want support in other ways as well. They want support to collaborate and partner in the work they do. They want help to find and access additional funding. They want to know how their work intersects with that of others in the community. They want support to do their best work. And they want to have a lasting impact.

This insight helped us to identify five Strategic Directions that will enable the United Way of PEI to be a valuable and effective community partner now and well into the future.

# Strategic Directions 2017-2020

- 1 Providing Direct Support:** Provide funding to program delivery experts for services to help alleviate the negative impacts of poverty.
- 2 Building Sector Strength:** Support organizations working with under-served communities to access and develop the required resources to achieve their mandate.
- 3 Mobilizing Community Action:** Work collectively with key stakeholders to address the root causes of poverty on PEI.
- 4 Building Resources:** Collaborate with donors and supporters to increase resources and provide meaningful opportunities to invest in local communities.
- 5 Ensuring Organizational Effectiveness:** Ensure efficient use of resources and maintain organizational stability with an engaged and fulfilled staff and board.



# Goals and 3-Year Objectives

Goals and 3 year objectives for each of the Strategic Directions are outlined in the following pages.

Detailed Year One tactics and success measures can be found on the strategic plan chart in Appendix A.

## Strategic Direction #1:

# Providing Direct Support

Provide funding to program delivery experts for services to help alleviate the negative impacts of poverty.

**GOAL:** UWPEI will have an outcome focused fund distribution process addressing the most significant social issues.

### **OBJECTIVES:**

- UWPEI will have clear understanding of the impact of its community funding stream based on outcome measurement.
- UWPEI will be able to facilitate distribution of funds in new funding streams.

## Strategic Direction #2:

# Building Sector Strength

Support organizations working with under-served communities to access and develop the required resources to achieve their mandate.

**GOAL:** UWPEI will have a portfolio of services and activities to support the strengthening of the non-profit sector across PEI.

### **OBJECTIVES:**

- UWPEI will identify and facilitate the delivery of professional/organizational development opportunities, to support the non-profit sector.
- UWPEI will facilitate and support opportunities to increase collaboration and share resources/services within the non-profit sector.
- Increase awareness of and access to social services for Islanders.

## Strategic Direction #3:

# Mobilizing Community Action

Work collectively with key stakeholders to address the root causes of poverty on PEI.

**GOAL:** UWPEI will have a community impact strategy that clearly identifies its role in addressing poverty on PEI.

### **OBJECTIVES:**

- UWPEI will identify the specific issue or role we are best positioned to play within poverty reduction and where resources will be allocated.
- UWPEI will identify its role within a collective approach to address poverty.
- UWPEI will have a measurable action plan within a collective approach to poverty reduction.

## Strategic Direction #4:

# Building Resources

Collaborate with donors and supporters to increase resources and provide meaningful opportunities to invest in local communities.

**GOAL #1:** Protect and Increase Workplace Campaign Revenue.

### OBJECTIVES:

- Develop a new board led “campaign cabinet” structure composed of influential community volunteers to increase campaign engagement and giving.
- Protect and increase donor participation and giving through improved engagement, succinct communication and relationship building.

**GOAL #2:** Increase Market Awareness and Engagement.

**OBJECTIVES:**

- Increase youth awareness and engagement.
- Improve/create new relationships with business donors to increase giving.
- Donor recognition plan.

**GOAL #3:** Improve Brand Awareness.

**OBJECTIVES:**

- Consistent messaging and branding in all external communications.
- Update UWPEI website to align with strategy and branding.
- Access new messaging mediums - concerts/youth-specific/social.

**GOAL #4:** Effective management of donor data.

**OBJECTIVES:**

- Leverage donor data for segmentation and associated communication tactics.
- Provide guidance to ANDAR prime for system input/output.

**GOAL #5:** Augment revenue streams.

**OBJECTIVES:**

- Increase giving choices with simple messaging regarding options for giving.
- Increase planned giving and major gifts.

## Strategic Direction #5:

# Ensuring Organizational Effectiveness

Ensure efficient use of resources and maintain organizational stability with an engaged and fulfilled staff and board.

**GOAL #1:** UWPEI has a talent management focus to attract and retain the best employees and volunteers.

### **OBJECTIVES:**

- Develop and implement performance management and professional development process and resources.
- Support ongoing learning and professional development opportunities related to role/responsibility.
- Preserve organizational knowledge and enable continuity of operations through succession and transition planning.



**GOAL #2:** UWPEI has a diverse and influential board leading the direction of the organization.

**OBJECTIVES:**

- Board members understand UWPEI and their leadership role within the organization.
- Board members have a clear understanding and plan for areas for board growth and development.
- Framework developed for the board to use in evaluating performance based on Strategic Plan.

**GOAL #3:** United Way of PEI uses resources in an efficient and innovative way to maximize impact focused resources.

**OBJECTIVES:**

- Ensure maximum return on investment for all operational expenses.
- Identify new opportunities for funding to offset operational costs.

# Tactics

We have identified actions to take in the next year to move towards achieving each of the objectives listed above.

The actions, success measures and individual within the organization responsible for each action are included in the attached strategic plan chart (Appendix A).