



# Strategic Plan 2022-2027

Updated: July 2022  
Board Approval: 10/25/22

**This Strategic Plan is guided by our commitments to...**

*Lead in collaboration*

*Raise awareness and support*

*Be ever-evolving and forward-thinking*

**...and our mission:**

*To mobilize the compassion and generosity of individuals and organizations  
in Addison County to improve lives and strengthen the community*

## Progress Toward our 2019 Goals & Objectives

<b>Done:</b> We did it and/or are doing it still!	<b>In Progress:</b> We're still working on it, there's more to do.	<b>Evolved:</b> Things look different now, working on it differently	<b>Ended:</b> We let this go. No longer working toward this.
<ul style="list-style-type: none"> <li>● Secured prevention grant</li> <li>● <b>Fully funded &amp; financially stable</b></li> <li>● Increased donorship outside of Middelbury</li> <li>● Fundraising is part of our persona</li> <li>● New &amp; innovative fundraising</li> <li>● Increase in funding &amp; number of donors</li> <li>● <b>Measurable, viable impact</b></li> <li>● One fundamental need measured and fixed</li> <li>● Convented/led, fundraised coordinated, lobbied volunteers toward challenge</li> <li>● Campaign style focused on community challenges</li> <li>● <b>Increased engagement &amp; awareness</b></li> <li>● Best known nonprofit in Addison County</li> <li>● Drastic increase in social media engagement</li> <li>● <b>Trusted leader &amp; resource</b></li> <li>● New website</li> <li>● THE resource center</li> <li>● Well-known source of advice for area nonprofits</li> </ul>	<ul style="list-style-type: none"> <li>● Less overlap among funded partners</li> <li>● More young people involved</li> <li>● Addison County “gets” our mission</li> <li>● Clear, defined awareness in community</li> <li>● Robust volunteer center</li> <li>● Pass 2008 campaign results</li> <li>● Retain great staff</li> <li>● Measurable data shows improvement and met goals</li> <li>● <b>Healthier Youth</b></li> <li>● Youth risk behaviors improved</li> <li>● <b>Board reflects our community</b></li> <li>● Increased # and diversity of Board members</li> </ul>	<ul style="list-style-type: none"> <li>● Board includes youth</li> <li>● Engaged parent advocacy group</li> <li>● Sustained prevention funding</li> <li>● Donors connected to focus/needs</li> <li>● Decrease in youth marijuana use (policy)</li> <li>● 3 year plans on specific challenges</li> <li>● Have put the message out on each challenge &amp; measurable data</li> <li>● Affinity groups active &amp; strong</li> </ul>	<ul style="list-style-type: none"> <li>● Won prevention champion award</li> <li>● Ingrained VT Youth Works program</li> <li>● Funded partners have resource coordinators supplied by us</li> <li>● 2-1-1 LOCAL</li> <li>● United@Work in high demand</li> <li>● United@Work expanded</li> <li>● United@Work has 3 Resource Coordinators and triple # of employers</li> <li>● Launched Bridges out of Poverty initiative</li> </ul>

**What else are we doing? (Not reflected in 2019 plan, but still happening)**

<b>Fully funded &amp; financially stable</b>	<b>Measurable, viable impact</b>	<b>Increased engagement &amp; awareness</b>	<b>Trusted leader &amp; resource</b>	<b>Healthier Youth</b>	<b>Board reflects our community</b>
365 Small Business Circle	Community Impact Funding	AC Racial Equity Learning Community	Learn United	Advocacy department & Board Committee	Hybrid approach to recruiting (open & targeted)
Emerging Leaders	Stuff the Bus	Emerging Leaders	Disaster relief preparedness	Expansion to public health & advocacy	Formalized orientation with staff
	My Free Taxes	Day of Caring	Anne Ginevan Fund		
		Volunteer Center	Networking with VT UWs		
			Fiscal agent partners		
			Homelessness response		

**Our NEW Shared Vision: What we want to see in place in 3-5 years**

<b>Our Board Reflects our Community</b>	<b>Trusted Leader &amp; Resource</b>	<b>Increased Engagement</b>	<b>Financially &amp; Operationally Stable</b>	<b>Informed Community</b>
Increased diversity of Board members	Funded partners report feeling supported by UWAC	Increase in # of volunteers	Steady growth in surplus	Donors/partners/stakeholders report “getting” UWAC’s mission
Board members are connected to community	Learn United continues to grow in offering and participation	Expanded donor/partner base	Increased endowment	
Increased meeting accessibility	Community Impact Funding process is equitable and remains driven by volunteers	Increased survey participation	Staff pay levels above market median	
Board invested in financial health of organization	Volunteer Center is robust/active	Increased youth engagement	Increased number of days cash on hand	
Board has understanding of what the community needs are (and what our gaps are)	Community Impact Funding partners demonstrate positive health, education, and financial stability outcomes	More attendees at UWAC events	Budget revenue goals steadily increased and consistently met	
		More followers/engagement on social media	Consistently positive audit results	

## Our Current Reality (bolded = most critical)

● = STRENGTHS	● = WEAKNESSES
<ul style="list-style-type: none"> <li>● <b>Skilled, dedicated, forward-thinking staff</b></li> <li>● <b>Open to new approaches &amp; ideas</b></li> <li>● <b>Strong relationships with funded partners</b></li> <li>● <b>Strong donor base</b></li> <li>● <b>Supportive, responsive, motivated Board</b></li> <li>● <b>Capacity to address community challenges</b></li> <li>● Dedication</li> <li>● Mission-focus</li> <li>● Visible leadership</li> <li>● Strong organizational structure</li> <li>● Nimbleness &amp; momentum</li> <li>● Strong VT United Way network</li> <li>● Office space</li> <li>● Community awareness/brand recognition</li> <li>● Strong media support</li> <li>● Connection to state leaders</li> <li>● Endowment</li> <li>● Event management</li> <li>● Good communication (social, e-news, etc)</li> <li>● Organizational perks &amp; benefits for employees</li> <li>● Specialized responsibilities of staff</li> </ul>	<ul style="list-style-type: none"> <li>● <b>Complexity of UWAC does</b></li> <li>● <b>Ratio of staff : opportunities is low</b></li> <li>● <b>Capacity of staff to take on more</b></li> <li>● <b>Board diversity &amp; size</b></li> <li>● <b>Staff diversity &amp; size</b></li> <li>● <b>Danger of staff burnout</b></li> <li>● <b>Limited talent pool (for recruiting)</b></li> <li>● Understanding advocacy as part of our work</li> <li>● Technology/WiFi issues</li> <li>● Internal electronic file organization</li> </ul>
● = OPPORTUNITIES	● = THREATS
<ul style="list-style-type: none"> <li>● <b>Build on success/demonstrate impact</b></li> <li>● <b>Connecting intersections of community challenges</b></li> <li>● <b>Network of partner agencies</b></li> <li>● <b>Expand donor base geographically</b></li> <li>● <b>Gaining efficiency/shared services</b></li> <li>● <b>VT culture of caring for each other</b></li> <li>● <b>Increased attention on biggest challenges</b></li> <li>● Generous population base</li> <li>● New residents</li> <li>● Expect the unexpected, build resilience</li> <li>● Middlebury College &amp; Porter Medical Center</li> <li>● Conduit for ARPA funding to local orgs</li> <li>● Federal/State funding for partners</li> <li>● Local progress on housing &amp; childcare spots</li> <li>● Bring equity lens</li> </ul>	<ul style="list-style-type: none"> <li>● <b>Macroeconomic factors (hgh cost of living, inflation, etc)</b></li> <li>● <b>Donor fatigue/pandemic fatigue</b></li> <li>● <b>Shifts in giving trends</b></li> <li>● <b>Need to communicate value of UWAC outside of crisis</b></li> <li>● <b>Aging donors/population base</b></li> <li>● <b>Donor complacency</b></li> <li>● <b>Erosion/pressure on partners that offer direct service</b></li> <li>● <b>Local nonprofit leadership turnover</b></li> <li>● Poaching</li> <li>● Competing priorities</li> <li>● Losing neutrality on issues</li> <li>● Relationship to UWW and UWVT</li> <li>● Federal grant &amp; funding allocations shifting from basic needs</li> <li>● Statewide issues limiting population growth</li> <li>● Losing Federal/State direct supports to community</li> </ul>

## What innovative ACTIONS can we take THIS YEAR to move us toward our SHARED VISION?

Shared Vision: Our Board reflects our community ●●		
<b>Actions</b>	Board annually engages in professional development opportunities through UWW/UWAC	Maintain current Board composition matrix to identify gaps in representation
<b>Metrics</b>	<p>Full compliance with UWW training standards</p> <p>All new Board members participate in on-boarding</p> <p>100% Board participation in survey of training needs</p>	<p>100% Board participation in composition matrix</p> <p>Recruitment plan targets filling gaps in representation</p>

Shared Vision: Expand role as trusted leader & resource ●●			
<b>Actions</b>	Robust participation in relevant community groups/ meetings	Use local data to identify gaps in service and create funding and/or advocacy plans to meet needs	Learn United meets professional development needs of local nonprofits
<b>Metrics</b>	<p>Increase # of staff attending external meetings</p> <p>Increase # of external meetings attended</p>	<p>Increased participation in community surveys conducted by UWAC</p> <p>Increased financial support for local needs</p>	<p>Nonprofit survey data informs seminar content</p> <p>Increased # of registrations</p> <p>Increase # of nonprofits registering</p>

Shared Vision: Increased engagement ●●●●		
<b>Actions</b>	Funded partners regularly connecting with each other/UWAC/other stakeholders	Donors regularly invited to give, advocate, and/or volunteer
<b>Metrics</b>	<p>Development of Volunteer Coordinator network</p> <p>Increased participation by funded partners in PEEPS, AC Racial Equity Learning Community, VT Voices, Days of Caring, Youth Scholarship nominations, Learn United, 0.5k event, parent groups, etc.</p>	<p>Increased # of invitations for community to donate</p> <p>Increased # of invitations for community to participate in Advocacy efforts</p> <p>Increased # of invitations for community to volunteer</p>

	Increased sector representation in youth coalition	Increased participation among individual and workplace donors in giving, advocating, and volunteering
--	--	---

**Shared Vision: Financial & operational stability** ●●●●

<b>Actions</b>	Pursue private foundation/State/Federal grant opportunities	Staff salaries align with benchmarks	Set a new campaign record	Develop organizational sustainability plan for post-grant reality
<b>Metrics</b>	Increased # of grants applied for Increased # of grants successfully awarded Increase grant revenue	Completion of wage & benefit survey analysis Benchmarks set and used in budgeting	Increased # of new donors Increased donor retention rate Increased # of recurring gifts	Completion of sustainability plans for DFC & PFS grants Financial forecasts for FY25 completed

**Shared Vision: Informed community** ●●●

<b>Actions</b>	Use data & stories to demonstrate need & build compassion for challenges	Maintain strong media presence (earned & paid)	Maintain financial transparency	New residents connected to UWAC
<b>Metrics</b>	Increased access to community data (e.g. YRBS) Increased understanding of local data Increased engagement with VT Voices	Increased # of news stories about UWAC efforts Increased engagement on social media (FB, IG) Paid ad campaigns scheduled throughout calendar year	Increase in amount/type of financial information available to public Increased access to financial information Audit results positive and made readily available to public	Enhanced partnerships with other orgs connecting with new residents



## **Our Shared Vision & Supporting Board Committees**

**Our Board Reflects our Community**

Governance Committee

**Trusted Leader & Resource**

Development Committee  
Advocacy Committee

**Increased Engagement**

Development Committee  
Advocacy Committee

**Financially & Operationally Stable**

Development Committee  
Finance Committee  
Governance Committee  
Advocacy Committee

**Informed Community**

Development Committee  
Advocacy Committee