



2020 – 2023 Strategic Plan

United Way of the Lowcountry

LIVE UNITED

**United
Way**



Dear Friends,

Since the 1950's, United Way of the Lowcountry has provided leadership in bringing partners together to leverage our collective knowledge and resources in order to solve human problems in Beaufort and Jasper counties. We work closely with people like you to unite our community and improve the lives of our neighbors.

This plan was created to help United Way of the Lowcountry focus on taking bold steps internally and externally to continue our success within the community and to increase our engagement with many of you.

We look forward to finding solutions to tomorrow's challenges in partnership with our supporters, volunteers, and community agencies. We invite you to join us in our quest to LIVE UNITED.

Sincerely,



Dale Douthat
President & CEO



Becky Francis
Board Chair

2020 – 2023 Strategic Plan Focus Areas

Evolve Our Core
Operations

Increase
Resources

Drive Impact

Evolve Our Core Operations

Objective: United Way of the Lowcountry will evolve our core operations in order to enhance communications, perform a digital transformation of backbone operations, and to improve financial systems and planning.

A. Marketing & Communications

UWL plans to enhance our Marketing & Communications programs and efforts, as a key enabler to our various strategic initiatives

Strategies:

- Establish an Annual Marketing and Communication Calendar, which enables both our Residential and Workplace campaigns, as well as other efforts throughout the year
- Refine the United Way of the Lowcountry brand and value proposition
- Enhance our Marketing & Communications capabilities, based on the new United Way Worldwide technology enablers

Evolve Our Core Operations

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B. Digital transformation

The UWL must undergo a Digital Transformation and ensure it is effectively utilizing various technology enablers to interact with constituents and run ongoing operations

Strategies:

- Establish and more fully utilize Charityproud as our core Donor Management System
- Evaluate and define training needs on primary and secondary technology enablers in order to successfully utilize each
- Prepare for evolving digital services by performing data cleanup
- Assess the opportunities and impact of the various technology enablers of the new UW Worldwide Digital Services

Evolve Our Core Operations

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C. Financial Systems and Planning

The UWL is establishing improved financial systems and financial planning

Strategies:

- Upgrade our accounting software and system to ensure the ability to meet the needs of growing demand
- Refine the UWL Chart of Accounts, so that the account structure better enables management of the business and requisite financials
- Establish a 5-year macro financial plan
- Establish a structured, full-lifecycle Grants Management program

Evolve Our Core Operations

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D. United Way Board Development

UWL will reinvigorate our Board of Directors structure, in order to ensure board member engagement in key areas, ensure board diversity, and better enable our strategy implementation

Strategies:

- Review and refine the skillsets required to provide quality governance for UWL
- Review and refine both our Board Committee structure and initiatives where we need board member involvement
- Review and refine requirements for board member participation in needed areas
- Evaluate board member mentorship and succession
- Evaluate diversity in our boardroom in order to appropriately represent our community

Increase Resources

Objective: United Way of the Lowcountry will increase resources by increasing engagement with individuals and corporations in order to provide the means to drive impact.

A. Individual Engagement

UWL will enhance our “Individual Engagement” in the community, by initiating a variety of changes which will both improve our Residential Campaign, as well as our volunteer efforts.

Strategies:

- Re-establish a “Focused Campaign Period” for Individual Engagement
- Establish a more structured, full-lifecycle Volunteer Program to engage the community in our various efforts throughout the year
- Establish a more proactive and well-rounded Alexis de Tocqueville Society Program
- Enhance our communications to individuals
- Establish and nurture a second Affinity Group (after Women United), focused on Young & Emerging Leaders

Increase Resources

Objective: United Way of the Lowcountry will increase resources by increasing engagement with individuals and corporations in order to provide the means to drive impact.

B. Workplace Engagement

UWL will enhance our “Workplace Engagement” by initiating a variety of changes which will both improve our Workplace Campaign, as well as the way we partner with businesses and public sector organizations.

Strategies:

- Re-establish a “Focused Campaign Period” for Workplace Engagement where possible, and clearly identify workplace schedules that fall outside of the Focused Campaign Period
- Leverage the UWWW Workplace Campaign Playbook to reinvigorate our workplace partner engagement and contribution
- Enhance our workplace communication methodology

Increase Resources

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C. Gated Community Program

UWL will establish a full lifecycle “Gated Community Program” which will better enable our interactions with residents of those communities

Strategies:

- Establish a formal Gated Community Program. This would be a full lifecycle approach to initiating, developing and managing UWL efforts in major gated communities in the Lowcountry
- Prioritize Gated Communities (and neighborhoods) and establish “champions” to help drive our UWL efforts in each top priority GC
- Facilitate and enable ongoing, sustainable efforts with these GC’s

Drive Impact

Objective: United Way of the Lowcountry plans to drive greater impact in our communities throughout Beaufort and Jasper Counties.

A. COVID-19 Response

The UWL is actively engaging in various community response efforts, intended to mitigate the long-term impact of COVID-19 on our counties

Strategies:

- Proactively engage in “Policy Advocacy” to encourage and leverage potential national relief bills in Congress, which may provide grant funding for our community
- Launch the UWL COVID-19 Relief Fund to assist the Lowcountry’s most vulnerable neighbors
- Increase collaboration with local and regional agencies
- Determine how to best reoptimize UWL resources in order to respond to this crisis

Drive Impact

Objective: United Way of the Lowcountry plans to drive greater impact in our communities in Beaufort and Jasper Counties.

B. Community Impact

UWL has successfully initiated the Community Impact process and is starting to see measurable results. We feel that we have enough experience to reassess our program based on obtainable data, and to make improvements were applicable

Strategies:

- Perform a holistic Needs Assessment of Beaufort and Jasper Counties
- Establish a schedule to evaluate Community Impact baseline metrics, and for recurring evaluation exercises
- Utilize the established priority areas (Education, Basic Needs, Income/ Family Stability, Health) as the organizing framework for ALL internal and external programs
- Research the viability of creating Community Development “discretionary fund” for emergent one-time small grants

Drive Impact

Objective: United Way of the Lowcountry plans to drive greater impact in our communities in Beaufort and Jasper Counties.

C. United Way Program Portfolio

UWL will periodically evaluate and optimize the UWL “Program Portfolio” (portfolio of Direct programs such as Education Impact, Helpline, Operation Backpack, VITA tax preparation, etc), in order to maximize the impact on community needs

Strategies:

- Perform a holistic Needs Assessment of Beaufort and Jasper Counties
- Periodically evaluate and optimize the UWL Program Portfolio, leveraging the Needs Assessment and program comparison criteria
- Utilize the established priority areas (Education, Basic Needs, Income/ Family Stability, Health) as the organizing framework for ALL internal and external programs
- Initiate an effort to define the future strategy and plans for Women United.