

Inspire Build Change



A Strategic
Business Plan
Summary



We believe in our community.

We believe that its success depends on the people who live in it.

That everyone has something to contribute.

That everyone deserves respect.

That everyone's potential can be realized.

That diversity is vital.

That every person has value.

That needing help and offering help go hand in hand.

That a safe, supportive community is everyone's responsibility.

We believe in possibilities.

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Background and Overview

In the Fall of 2006, the United Way of Greater Simcoe County's (UWGSC) Board of Directors embarked on a journey to develop a new vision and strategic plan that would guide the organization's activities. The Board of Directors adopted the new strategic plan in March 2007 following a six-month process that included:

- an internal analysis of UWGSC operational activities, including a review of our human resources and our financial, marketing, technological, and resource development practices;
- an environmental scan of demographic, political, economic, social, and legislative trends;
- a review of United Way of Canada-Centraide Canada strategic plans, as well as those of United Ways of Ontario and of United Ways of Toronto, Peel, London-Middlesex and Saskatoon;
- the new United Way of Canada-Centraide Canada's *Standards of Excellence – September 2006*;
- extensive consultations with volunteers, staff, member agencies, community groups in Orillia, Midland, Barrie and South Simcoe, corporate donors and our own Training and Consulting Services (TCS) consultants.

A Steering Committee of board members and key staff led this process, which was facilitated by MacComm Social Marketing represented by Robb MacDonald and Gord Ball.

Throughout its history, UWGSC has been building community capacity to respond to social issues through its traditional activities of fundraising, fund allocation and community development. Although these activities will continue to be at the core of what we do, our community consultations revealed that our community and donor-investors want to see measurable results in terms of social impact from their investment. They also expect more UWGSC leadership and advocacy in our sector and our local communities. UWGSC will seek to increase our *internal* capacity so that we can truly define, create and achieve increased *community and social* capacity. We aspire to become a **Community Impact United Way** in order to meet our community expectations and to be aligned with United Way of Canada-Centraide national strategies and directions.

Our strategic plan envisions UWGSC building better communities by being a leading mobilizer of resources – financial and other. Building partnerships and convening groups – of people in business, government, labour, agencies, education, health, cultural groups and community organizations – will be integral to developing solutions for our community's most complex issues. We commit to reviewing our progress towards these goals and to being proactive with regard to emerging issues and needs in our community.

Community Impact is "achieved by mobilizing collective action – it is measurable, cumulative and lasting change that improves lives and builds resilient communities." (for more on Community Impact, see p.6)

On behalf of everyone with United Way of Greater Simcoe County, we thank our entire community for its tremendous support of our organization. We look forward to inspiring your continuing generosity and support to build a better community for everyone.

United, there is a way. Without you, there would be no way.

Most sincerely,



Jim Dickie
Board Chair



Seija Sutari
Executive Director

Values

The values of the United Way of Greater Simcoe County are the guiding principles and philosophical pillars that support the organization. These values are reflected in all we say and do. They form the basis of our organizational culture and inform the decision-making of our board members, staff and volunteers.

Accountability

We are committed to meeting the expectations of all our stakeholders, including our donor-investors, community partners and citizens within Simcoe County. We achieve our high standard of accountability through an outcomes-based, transparent and measurable process that involves regular communication and consultation with our stakeholders.

Community capacity

We value both the process and the outcomes associated with engaging people in collaborative partnerships to build community capacity. We have special respect for people who come together in groups to examine their circumstances, draw upon their own resources and take collective action.

Community - and stakeholder - focused

We commit to a caring and professional approach to relationships with our donor-investors, our communities and those in whom we invest. We are ever mindful that we are here for them.

Integrity

We adhere to the highest ethical standards and work tirelessly to engender and maintain respect and trust from our donor-investors, member agencies and communities.

Voluntarism

We are committed to providing the leadership and support to ensure all our volunteers are engaged, valued and recognized for the energy, skills and experience they provide us.



Vision

In 2010, United Way of Greater Simcoe County will be a trusted leader in mobilizing resources to build a better community.

UWGSC will be seen by agencies and the public as a trusted expert on social trends, needs, assets and opportunities in Simcoe County. Both locally and within other jurisdictions across Canada, UWGSC will be recognized as a rising star, a best practice and a model of organizational excellence to emulate.

The organization will have achieved this status by working collaboratively to determine the needs and assets within communities throughout the County and by taking action to address them. The UWGSC will truly be a *Community Impact United Way*.

The increased profile and improved reputation of the United Way as Simcoe County's social development investment advisor will have resulted in an unprecedented increase in the amount of money raised to improve lives and build communities in Simcoe County. More than \$2 million dollars will have been raised in 2010.

Mission

To inspire the people of Simcoe County to improve lives and build community through financial generosity and volunteer commitment.



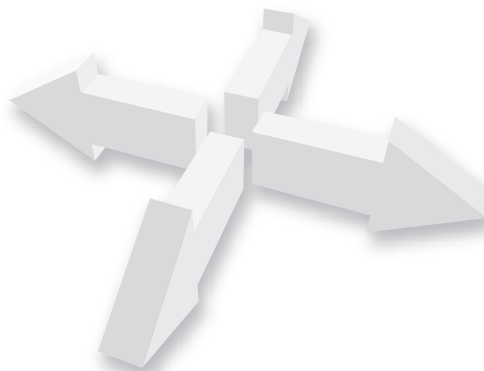
Strategic Priorities

To reach our vision, United Way of Greater Simcoe County must:

1
Increase significantly the campaign target

2
Strengthen our profile in communities throughout Simcoe County

4
Strengthen our internal capacity



3
Strengthen our strategic collaborations to mobilize local resources and achieve positive social impact in Simcoe County communities

Desired outcomes

The campaign revenues have increased to \$2,010,000 annually by 2010.

Campaign goals are aligned with community impact goals.

The UWGSC campaign is recognized as being a *local* campaign that supports the broader social impact agenda in Greater Simcoe County.

Donor-investors, big and small, are committing in greater numbers.

Citizens have more opportunities to contribute year-round.

Donor-investors are engaged year-round and participating in United Way initiatives and planning discussions.

1

Increase significantly the campaign target

Strategic
Priorities

4

Strengthen our internal capacity

Desired outcomes

UWGSC has the requisite human resources (staff, volunteers, loaned reps, HRDC grants, students) to implement the strategic plan. *People are the priority!*

UWGSC has high-profile, enthusiastic and authentic volunteer leadership (board, campaign cabinet) with the appropriate talents.

Systems are in place to measure our social impact and report it to the community.

UWGSC has an effective Executive Director-Board leadership team.

UWGSC has an up-to-date and interactive website.

UWGSC has the technology to track and manage donors and volunteers.

UWGSC is continually reviewing and improving upon our financial accountability.

2

Strengthen our profile in communities throughout Simcoe County

Desired outcomes

Citizens are hearing, seeing and talking about evidence of the impact of UWGSC support in their home communities.

UWGSC is seen by agencies and by the public as an acknowledged and trusted expert on social trends, needs and opportunities in the various communities of Greater Simcoe County.

Community agencies and voluntary organizations covet an affiliation and are eager to collaborate on UWGSC initiatives.

UWGSC is an acknowledged, leading, social development investment advisor in Greater Simcoe County.

Stakeholders and citizens understand the roles of UWGSC in their local communities.

Strengthen our strategic collaborations to mobilize local resources and achieve positive social impact in Simcoe County communities

3

Desired outcomes

Close working relationships with key stakeholders in each Simcoe County community (e.g. agencies we fund, local donors, local governments, Alliance to End Homelessness, County Allocations) will be helping us to achieve strong social impact.

UWGSC is contributing to a shared understanding of local issues and needs, mobilizing resources and facilitating collaborative initiatives – community by community.

UWGSC is increasing the capacity of local human service organizations in a variety of ways to address broad, community-level outcomes that improve lives and build community.

UWGSC is working with local communities to assess needs, identify resources and help find solutions.

Increased resources from the UWGSC campaign are strengthening our capacity to have a strong, positive impact on social conditions in Simcoe County communities.

What is Community Impact?

According to United Way of Canada – Centraide, community impact is

“achieved by mobilizing collective action – it is measurable, cumulative and lasting change that improves lives and builds resilient communities.”

Since 1959, United Way of Greater Simcoe County has been helping people to improve their lives and the lives of their families. The traditional model we, and other United Ways, have used has focused on raising and allocating funds to community programs and services. And while these two methods will continue to be at the core of our operations, we recognize the need to go beyond this approach to address the complex issues within our communities.



There is tremendous interrelationship between the work United Way and others are doing to address key issues. For example, to effectively influence a specific condition such as poverty, we need to apply a comprehensive approach that includes education, housing, early childhood development, transportation, literacy, health, employment and many other factors that affect poverty. By examining our communities through a proactive, community impact lens, we believe our efforts will be more measurable, cumulative and sustainable.

Our goal as a Community Impact United Way is to work with individuals, agencies, organizations, corporations, government, sectors and systems to achieve widespread, positive social change in our community. Together, we will work to prevent and address social problems by influencing the systems and conditions that affect lives and communities.

United Way will build community capacity to help individuals, groups and communities to strengthen their assets, qualities and characteristics so they can respond to present and future challenges and opportunities. As a Community Impact United Way, we will mobilize resources, including people, funds, partnerships, wisdom and time, to build capacity by working collaboratively to develop common agendas that will improve the lives of people and create long term measurable social change in our community.



The diagram below highlights the difference between a traditional United Way approach and the community impact model. This new approach embraces and integrates the strengths, assets and capacities of our community. By strengthening our community fabric, we can achieve positive impact on individuals and families.



The differences between the Community Impact United Way and the Traditional United Way

Community Impact United Way

- Asset-based philosophy
- Citizen
- Strategic agenda(s) set by/with community
- Address root causes
- Fundraising a key tool in supporting work
- Range of investment strategies
- Resource development is diverse and ongoing
- Measuring and reporting impact
- Success measured in changing community conditions
- Shared ownership and credit
- Collaborative
- Inter and intra-dependent action
- Making the case
- Building/nurturing partnerships and collaborations

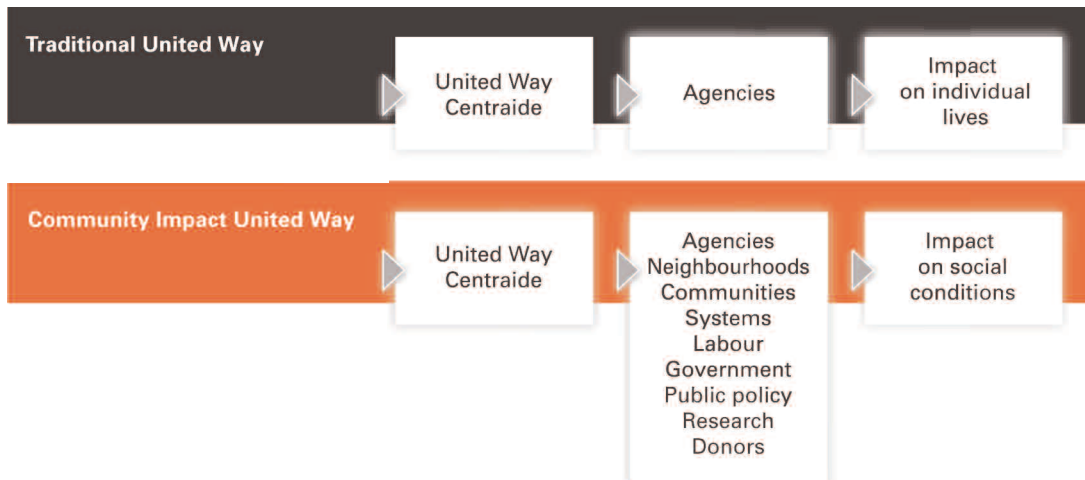
Traditional United Way

- Charity
- Client
- Agency sets agenda
- Reactive to issues
- Primary role is fundraiser
- Single strategy: funding agencies
- Annual workplace focus
- Reporting program activities
- Success measured in dollars
- UW owns the work and credit
- Competitive
- Internal silos
- Entitlement
- Managing relationships

The new Community Impact United Way measures its success by what it has done to make a measurable change in important community issues. Its strategies are designed to be **holistic, collaborative, meaningful, measurable and accountable.**

The differences between the Community Impact United Way and the Traditional United Way

Achieving an impact on social conditions requires various stakeholders to work together on common community issues. The efforts of all community stakeholders must be aligned, coordinated and focused on sharing outcomes.



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