**United Way New York State Strategic Plan 2020**

12/17/19

The Strategic Plan is a statement of the major objectives of the organization and is a guide through the year to maintain focus on high priority activities. It also serves as a measurement of organizational success, and provides timelines for results where appropriate. It is flexible and subject to adjustment as new circumstances arise. The Plan is given major review and, is adopted at the end of each calendar year, and is adjusted through the year as appropriate.

**Key Goal #1 - Public Policy and Advocacy**

With the oversight and participation of the Public Policy Committee, engage in lobbying ,and advocacy efforts that ensure the New York’s United Ways speak with one voice on identified issues of importance and build relationships with public officials and policy makers

1.1 Identify public policy priorities for 2020-2021 and develop position statements that support them by 12/31. The identified priorities for 2020 will be within the focus areas of 2-1-1 Funding; Access to Health and Human Services, ESPRI Program; Economic Security, School Readiness and Success, and Charitable Sector Issues

1.1.1 Survey the membership, work with the UWNYS Public Policy Committee and engage our advocacy advisors by Oct 1.

1.1.2 Facilitate a planning session at the in-person Membership Advisory Committee (MAC) meeting in July.

1.2 Advocate with key state level policy makers (Governor’s staff, Division of the Budget, relevant state agencies, Office of the Attorney General, Office of the State Comptroller, state legislators and legislative staff) about the policy priorities.

1.2.1. Provide 2-1-1 material to all state legislators by 2/1.

1.2.2. Submit Budget testimony 2/1

1.2.3 Individual meetings with key contacts in above referenced offices during a fall lobby day, 2-1-1 Day and throughout the year.

1.3 Provide direction and information to contracted lobbyists to focus their efforts on outcomes important to the network.

1.3.1. With the Public Policy Committee and Board review performance against existing agreement and make recommendations about continuing the contract by 12/31.

1.4 Provide information and periodic updates to member United Ways about lobbying and advocacy goals, strategies, activities, bill and budget summaries, opportunities and threats.

1.5 Provide calls to action and the supporting materials to facilitate local UW engagement in public policy advocacy; strategically engage local United Way to communicate advocacy messages with key elected officials.

1.6 Partner with other organizations, as relevant and appropriate, on matters of mutual interest.

1.6.1. Develop relationships with at least three key third party validators for our priority areas.

1.7 Support federal level advocacy when federal issues affect state priorities.

1.7.1 Conduct federal level advocacy on EITC and CTC expansion efforts.

1.7.2 Conduct federal level advocacy on a Universal Charitable Tax Deduction.

1.8 Serve on relevant advisory committees, task forces, coalitions, etc. that correspond to United Way public policy priorities.

**Key Goal #2 - Resource Development and Management**

Develop revenue strategies to support the revenue generation efforts of UWNYS and its member United Ways through a combination of proven resource development strategies. One goal is to develop sufficient resources to support the membership priorities with a balanced budget. Another goal is to facilitate multi-United Way efforts to identify and pursue opportunities to obtain funding for statewide work of Local United Ways.

2.1 Work through MAC to identify and develop relationships with prospective funders (government, corporate and philanthropic) that support both local United Way and UWNYS priorities and apply for available appropriate grants.

2.2 Advocate with grant-makers for grant applications that have been submitted by local United Ways (as requested and appropriate).

2.3 Promote UWNYS and local United Ways as effective stewards of grants.

2.4 Effectively manage the expected deliverables for any grants that are received providing both technical support and oversight of the grant deliverables.

2.7 Continue to strengthen financial stability of UWNYS and continue to diversify revenue.

2.7.1 Work to fully resource statewide efforts, such as 2-1-1 New York (fully resourced at this time) and ALICE (not fully resourced) to cover project costs, including staff resources.

2.7.2 Consider additional statewide revenue generation strategies

2.7.3 MAC to review and consider dues adjustment and additional revenue strategies

with a recommendation created on 2/12/20 for implementation in July.

**Key Goal #3 - Manage Statewide Initiatives**

Provide leadership for statewide initiatives and effective stewardship of resources; managing projects for the benefit of the statewide organization and local members. Initiatives include 2-1-1 New York, ALICE, ESPRI and advocacy.

3.1 ALICE

3.1.1 Carry out contract and fiscal sponsorship responsibilities, including managing the relationship with the national ALICE office and supporting the NYS ALICE Steering Committee. Primary 2020 focus will be the ALICE report refresh slated for released in July.

3.1.2 Manage member outreach and engagement and stakeholder relationships, and identify and disseminate best practice implementation strategies.

3.1.3 Manage the Research Advisory Committee process and the marketing and other work groups as needed.

3.1.4 Engage with other ALICE states to leverage existing strategies.

3.1.5 Work with members to consider sponsorship strategies and member investment leading to a fully resourced ALICE Project in 2020.

3.2 ESPRI

3.2.1 Providing leadership and convening to the local UW network to share information and best practices and develop strategies.

3.2.2 Provide outreach to the appropriate state agencies and state stakeholders.

3.2.3 Continue advocacy role on program issues with state regulators and state legislators.

3.2.3.1 Advocate for funding expansion with the NY Governor’s Office, based on a figure derived by ESPRI Lead Orgs in consultation with lobby firm.

3.2.3.2 Assess ESPRI Lead Group’s consensus on engaging in advocacy efforts around “benefits cliff”.

With the 2-1-1 New York, Inc. Board, manage the 2-1-1 project.

3.3 2-1-1 New York, Inc.

3.3.1 Develop/maintain relationships with agency decision makers and key program and contracting staff within each agency in order to negotiate contracts, develop budgets, provide required reports and submit reimbursement claims on a timely basis. Current contract agency is OCFS.

3.3.2 Maintain relationships with the ten regional 2-1-1 lead organizations and leadership of the eight contact centers in order to effectively advocate for and manage grants and partnerships for 2-1-1 services.

3.3.3 Represent 2-1-1 to various stakeholder groups in order to develop new partnerships and opportunities.

3.3.4 Maintain the 2-1-1 designation, awarded by the PSC, which includes oversight of the regional lead organizations and 2-1-1 contact centers to insure high quality and consistent service delivery.

3.3.5 Support the 2-1-1 New York Board, which meets quarterly, includes development and oversight of the annual 2-1-1 NY budget.

3.3.6 Continue the development of standards for the 2-1-1 system that will improve service, create efficiencies and enhance sustainability.

3.3.7 Continue pursuit of Cyber Crime Support Grant for 2-1-1 Network

3.3.8 With the 2-1-1 NY Board annually assess the financial needs of the 2-1-1 system and formulate the request to the Governor and Legislature for the resources needed to sustain the system.

3.3.9 Advocate for expanded funding of $500,000 and designation to support activation of 2-1-1 upon NY State “State of Emergency”. Compile baseline system capacity to respond to disaster. After this is established, provide model MOU’s for local regions to create similar arrangements for county-wide or local State of Emergencies.

**Key Goal #4 - Network Engagement**

With the oversight and participation of the Membership Advisory Committee, (MAC) maximize learning and partnership opportunities with and among United Ways to promote economies of scale and maximize impact; and facilitate shared approaches to common interests and priorities.

4.1 Actively reach out to local United Way CPOs through electronic communications, telephone, personal visits and the annual member survey to understand their needs, capabilities and priorities.

4.2 Facilitate United Way networking activities which could include regional United Way meetings, monthly CPO conference calls, summer conference, etc. Evaluate current strategies for opportunities to improve.

4.3 Support and engage with the Membership Advisory Committee. Establish collaboration software to facilitate network efforts.

4.4. Provide and/or broker local United Way requests for assistance; may include direct assistance from UWNYS or referral to a member United Way with the relevant knowledge/experience.

4.5 Assess system interest in various topics and, in conjunction with local United Way leadership, convene 1-2 working groups to assess needs and design and deliver training or other resources to the network.

4.5.1 As indicated by the member satisfaction survey, explore network activities, training, etc. on resource development and community impact.

4.5.2 Convene group to explore and consider NYS Association’s role in supporting members with Modern United Way and digital services.

**Key Goal #5 - Organizational Development and Management**

With the oversight and participation of the Executive, Audit, and Budget & Finance Committees, adopt a strategic plan, a board development plan and a budget plan; take action to address identified issues.

5.1 Develop and adopt an updated organizational strategic plan by 12/31.

5.2 Continue work on a board development plan; including diversity and director training objectives by12/31.

* Conduct Board Self-Assessment in 2020.
* Ensure candidates recruited reflect diversity in geography, demographics and skills.

5.3 Develop and adopt a budget plan by 12/31.

5.4 Complete a clean audit process for UWNYS and 2-1-1 New York, Inc.

5.5 Provide support to the Board and its Committees.