

## **Strategic Directions Summary Report**

On January 28, 2020, Valley United Way's (VUW) Board of Directors adopted a Strategic Direction Plan funded in part by a generous grant from the Valley Community Foundation. The plan was to be presented to the community at VUW's Annual Meeting scheduled for April 30, 2020. However, due to COVID-19, the meeting was cancelled, and the presentation of the Plan was put on hold. This document is meant to help inform and engage the community on VUW's new Strategic Direction.

### **Strategic Direction Plan Implementation**

To maximize its support of Valley residents, VUW had been serving in both broad fundraising and resource intensive program management functions. Going forward, VUW is refocusing its efforts *to engage the corporate community as a value-added resource to the Valley's philanthropic landscape, and to concentrate resources on areas of education, income, and health - in partnership with nonprofits*. In short, Valley United Way's primary efforts need to be centered on resource development to help enable the services our nonprofits so aptly provide to the Valley's residents. To this end, the Board has committed to the following efforts:

- VUW will shift from an annual campaign approach to year-round resource and relationship development to promote new corporate partners and leadership givers.
- VUW will strengthen its collaborative partnerships with area nonprofits, as well as the Valley Council for Health and Human Services (VCHHS), as a core strategy to fulfill its obligation to donors' interests.
- VUW will no longer manage programs that provide a direct service to the community. However, VUW will work in partnership with the Corporate Volunteer Council (CVC) and VCHHS to transfer or realign existing programs to nonprofit organizations best suited to provide such services.
- The CVC will become a standing board committee tasked with promoting workplace giving, while educating and engaging corporations on community issues.
- VUW's Board structure will be revised to increase its governance, fiduciary and fundraising capacity. This will include a reduction of Board members, designated seats for its largest corporate contributors, and term limits.
- VUW's Board and Interim President will design the most effective and cost-efficient staffing structure to accomplish the above work. The goal is to implement new staff structure in early 2021.

### **What Has Been Accomplished**

- Conducted virtual meetings to brief its partners (non-profits, key stakeholders, CVC members, Women United, and other program participants) on the organization's strategic direction.
- Restructured current staff positions from seven full-time employees to equivalent three full-time employees to better meet the needs of the organization.
- Hired a part-time Development Director through a shared service agreement with United Way of Greater New Haven.
- Implemented new Board roles and redefined committees to serve the goals of the strategic plan, including transitioning CVC to a Board Committee
- Transferred management of "Grow Your Own" gardens to Massaro Community Farm.
- Restructured workplace campaigns to allow for virtual and electronic experiences.
- Reached agreement with Interim President/COO, David Kennedy, to remain in role until 2021

*During this transitional time, we welcome your feedback and encourage you to reach out to Interim President and COO David Kennedy: [David.Kennedy@ValleyUnitedWay.org](mailto:David.Kennedy@ValleyUnitedWay.org).*