



**United Way
of Greater New Bedford**

STRATEGIC PLAN 2024 - 2029 SUMMARY



UNITED WAY OF GREATER NEW BEDFORD STRATEGIC PLAN



INTRODUCTION

Since 1953, United Way of Greater New Bedford (UWGNB) has been a steadfast presence in the area, investing in the South Coast and mobilizing resources to build stronger, more connected communities thanks to the generosity of local companies, their employees, and many donors. The work our partners and we do directly within the community and the broader trends we see across our region yield important insights that inform our focus areas in health, education, and financial stability. They have helped us understand the interconnection of system-wide issues affecting these areas whose root causes stem from racial, social, economic, and other disparities.

With this in mind, we strategically align our expertise, programs, and grantmaking, and our role as a funder, leader, and convener to reduce significantly prevalent problems such as poverty, which we have found to be a contributing factor and common thread across basic needs like food security, access to health services, and shelter. This holistic approach allows us to tackle these issues effectively.

The 2024-2029 United Way of Greater New Bedford Strategic Plan culminates these efforts and reflects a commitment to be more intentional about our impact areas. Moving forward, to guide our prioritization for transformative change, they will be integrated into newly organized and categorized impact areas of Healthy Community, Youth Opportunity, Economic Mobility, and Family Resilience.

Our plan over the next five years includes three main goals to enable continued success in these areas and ensure our approach remains equitable.

- Establish measurable community impact strategies and collaborate with partners to catalyze equitable outcomes.
- Grow participation and support through proactive engagement with current and potential partners, donors, and volunteers.
- Build our organizational strength and agility.

Collectively, our strategy, impact areas focus, and goals for the coming years will maximize regional collaboration and harness the full spectrum of resources and capabilities that UWGNB brings to the community.

UWGNB looks forward to partnering with you to advance our mission and realize the plan outlined in the following pages. Your support and collaboration are instrumental in driving the innovative, community-driven work for which UWGNB is known. Together, we can make meaningful impacts that strengthen our region.



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OUR CORE COMMITMENTS

VALUES

Empathy: We show great care towards the diverse communities we serve. We believe in the inherent value of all people, and we strive to ensure a sense of belonging for everyone.

Integrity: We conduct our relationships openly, honestly, and fairly where commitments are honored, and the spirit of generosity can be nurtured.

Agility: We embrace and adapt to the changing needs of our communities.

VISION

A region where all people have access to the resources and opportunities they need to thrive.

MISSION

To mobilize people, partnerships, and resources to catalyze change that strengthens the communities we serve.



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IMPACT AREAS

In our role as a funder, convener, and operator of programs, our organization is positioned uniquely to catalyze change and lead collective efforts in our impact areas:

Healthy Community

Increase access to basic needs and strengthen physical, mental, and social wellbeing to support safe and healthy communities.

- Nutrition & food security
- Mental health
- Maternal & child health
- Substance misuse

Youth Opportunity

Promote enriching learning opportunities that help young people realize their full potential.

- Early education and childcare
- In- school, after- school & summer learning
- Literacy development

Economic Mobility

Advance pathways to financial stability and improved quality of life by empowering people to make informed financial decisions.

- Financial education and coaching
- Public benefits access
- Homelessness prevention & affordable housing

Family Resilience

Support families in building a healthy environment for children by honing their skills to withstand and rebound from inevitable life challenges.

- Child abuse & neglect prevention
- Family Case Management
- Parent education
- Safe living environments

Authentic, sustainable progress in these impact areas requires directing attention to root causes and the complex, intertwined systems in which they exist. It also means attention to the disparities that necessitate targeted responses for us to impact and reach “all.” UWGNB will boldly advance our methods of attracting philanthropic support and responsibly steward the resources entrusted to us. Our strategy and goals for the coming years will maximize regional collaboration and harness the full spectrum of resources and capabilities that UWGNB brings to the community.



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GOAL 1

Address our most pressing regional challenge through measurable community impact strategies and collaborate with partners to catalyze equitable outcomes.

UWGNB will align its expertise, programs, and grantmaking with regional needs to deploy a full spectrum of resources and capabilities to address the root causes of our most pressing regional challenges. With input from the community, we will refine grantmaking and program practices, track progress, ensure equitable outcomes, and evaluate effectiveness. We will measure impact to provide understanding and clarity of purpose.

OBJECTIVES

- a. Establish and implement a process for auditing our equity practices internally and externally.
- b. Listen to and engage with community members - especially those experiencing the challenges we are addressing – to share ownership and solutions that address our region’s needs and build on its strengths.
- c. Use community insights to bring our resources to audiences and organizations that reflect community priorities.
- d. Measure outcomes of our investments (grantmaking and programs we operate) to determine efficacy.
 - i. Identify indicators for impact areas that connect to intended outcomes.
- e. Use research, data, and feedback to align programs, reduce duplication, optimize resource efficiency, and leverage our assets and resources equitably.
- f. Gauge partner organization roles and enhance regional capacity to build networks that support our impact areas.
- g. Develop meaningful volunteer opportunities to expand capacity and deepen support to partners



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GOAL 2

Leverage our unique role in the region to grow participation and support through proactive engagement with current and potential partners, donors, and volunteers.

UWGNB will promote its unique value through an effective marketing strategy that builds upon its strong reputation across audiences and channels. The greater visibility will assist us in implementing a robust stewardship program that ensures volunteers and donors have the deepest awareness of UWGNB and its extensive work in the community to invest their time, treasure, and talent in meaningful change.

OBJECTIVES

- a. Consistently and proactively articulate unique value proposition and leverage UWGNB's brand assets to build a strong reputation across audiences and channels within all the communities UWGNB serves.
 - i. Create branding and marketing materials that showcase today's modern UWGNB.
 - ii. Leverage the 75th anniversary to heighten visibility, awareness, and support of our work.
 - iii. Segment communications channels and customize content to target specific audiences effectively.
- b. Implement a robust stewardship program to ensure donors and volunteers are deeply aware of UWGNB and its extensive work in the community.
 - i. Devise a new approach to enlist existing and new donors to become consistent, active supporters of UWGNB.



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GOAL 3

Build our own organizational strength and agility.

Authentic, meaningful work requires investing in people and systems for organizational health. UWGNB will equip our board and staff with the tools needed to continue diversifying our revenue streams, building an equitable and forward-thinking culture, and identifying opportunities to support efficiency and impact.

OBJECTIVES

- a. Build an equitable and forward-thinking culture supported by human resources best practices.
- b. Equip the Board of Directors with the knowledge and tools to serve as ambassadors for UWGNB for community outreach, unearthing opportunities, including philanthropic giving.
- c. Create capacity by further engaging volunteers in the work of UWGNB through committees.
- d. Seek out new opportunities to continue diversifying revenue streams, including raising additional unrestricted support revenue.
 - i. Explore feasibility and return on investment for Fee for Service program models.
 - ii. Explore institutional, public, and foundation funding for UWGNB impact areas.
 - iii. Create a strategy to grow endowment.
- e. Explore opportunities for collaboration or efficiencies with other local United Ways (UW)
- f. Identify technology to enable organizational efficiencies and impact measurement.

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STRATEGIC PLANNING PROCESS

In the fall of 2023, UWGNB launched a strategic planning process. Working with Strategy Matters, UWGNB leadership co-created an approach designed to build on many already-existing elements of a plan for the future, while taking into account the need for staff engagement and a foundation for basing the plan in the New Bedford region's most pressing needs and already existing assets.

Process Recap



This multiphase process sought input from leadership, staff throughout the organization, board members, community partners, grantees, and landscape data.



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APPENDIX A: KEY PEOPLE

BOARD OF DIRECTORS

Dr. Shanna Howell, Ph.D. - Board Chair
Christopher Fortier, PharmD, FASHP, CPEL - Vice Chair
Jennifer Olivier, CPA - Treasurer
Jennifer D. St. Pierre, CPA - Clerk
Roland Giroux, Esq. - Immediate Past Chair
Nicole Almeida
Starlene Alves, Esq.
Heather M. Bonnet-Hebert, Esq.
Morgan Diaz
Jennifer Downing

Francine Ferguson
Monte Ferris, Jr.
Jacqueline G. Somerville, PhD, RN, FAAN, NEA-BC
David Gomes, Esq.
Donald Hartley
Rosemarie Lopes, CLU, REBC, RHU
Michelle Loranger
Matthew J. Payette
Ray Surprenant
Nelson Tavares

TEAM

Michelle Neves Hantman - President and Chief Executive Officer
Kristine Arsenault Cunningham - Development Manager
Savannah Duarte - Family Resource and Development Center, Family Support Worker
Carla Fernandes - Child and Family Services, Family Partner
Katherine C. Crawford, Chief Finance and Human Resources Officer
Fatima Galarza - Family Resource and Development Center, School Liaison
Victoria Grasele, MPA - Vice President of Marketing and Communications
Gretchen Hubert - Executive Assistant
Nicole Kelly - Office Assistant
Sarah Labossiere - Hunger Commission Coordinator
Dora Lima - Financial Wellness Coordinator
Paula Montgomery, MPA - Women United Director
Telma Rosa-Silva - Family Resource and Development Center, Family Support Worker
Sarah W. Rose, MBA, MAT - Chief Impact Officer
Lourdes Torres - Family Resource and Development Center, Administrative Specialist

PREPARED WITH

strategy matters



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COMMONLY USED TERMS

1. **Baseline Indicators** – Any data point reflecting a state or trend existing at the start of a programming period.
2. **Community impact agenda** – A comprehensive set of interrelated focus areas (priorities), impact goals, strategies, approaches/programs, and intended results that United Way of Greater New Bedford (along with community partners) advances to create equitable community-level change that explicitly addresses persistent gaps and disparities.
3. **Community Partners** – Supportive relationships between United Way and other community agencies. These relationships can be with individuals, groups, for-profits, non-profits, government agencies, etc. Community partners seek to understand and leverage each other's goals, perspectives, strengths, and challenges. Community Partners value and nurture their relationship with each other and look for ways to strengthen the partnership while addressing the root causes of shared issues.
4. **Families** – Adult with child 18 or younger in their care.
5. **Individual donor** – A person who gives money or other types of assets to United Way.
6. **Leading indicators** - Action guiding, help us determine how we spend our time/resources, and can be closely connected to our objectives.
7. **Lagging indicators** –Help us understand progress on our overall goal statement.
8. **Segmentation** - Division into separate parts or sections.
9. **Unrestricted support** – Money collected by United Way that does not have donor restrictions.





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