

**Strategic Goals for United Way of Hall County  
January 2009 - December 2011**

**Goal #1: To develop a community investment process that utilizes financial resources to improve lives in Hall County.**

|    | Objective   | Projected Date of Completion | Accomplishments to Date   | % Complete  |
|----|---|------------------------------|---|-------------|
| A. | Review current focus areas and assess appropriateness of alignment with UWA's "Goals for the Common Good" 10-yr goals/indicators for Education, Health and Income | Complete                     | Evaluated current focus areas of: <ul style="list-style-type: none"> <li>• Helping Children &amp; Youth Become Successful Adults</li> <li>• Providing Crisis Intervention</li> <li>• Developing &amp; Promoting Self-sufficiency Skills to Improve Quality of Life</li> </ul> Determined they are still valid and appropriate to current community issues and align with mission of United Way. | <b>100%</b> |
| B. | Convene focus group to determine if "Improving Peoples Health" should be addressed as a 4 <sup>th</sup> focus area or included in current focus areas.            | Complete                     | Based on recommendation, board approved "Health" as fourth focus area.  | <b>100%</b> |
| C. | Determine an appropriate community investment model that addresses community issues and respects current partner agencies.  | Complete                     | Board approved revised Community Investment model: <ul style="list-style-type: none"> <li>• Level one – partner agencies</li> <li>• Level two – strategic investments</li> </ul> Will be implemented with 2009 allocation process.  | <b>100%</b> |
| D. | Marketing assessment reveals community is unsure of who United Way serves and a need for clear and consistent terminology   | Complete                     | Simplified messaging to answer the question "who does United Way serve?" to:<br><br>United Way improves lives in Hall County by focusing on <ul style="list-style-type: none"> <li>• Children &amp; Youth</li> <li>• Crisis intervention</li> </ul>   | <b>100%</b> |

|    | Objective   | Projected Date of Completion | Accomplishments to Date  | % Complete |
|----|---|------------------------------|--|------------|
|    |   |                              | <ul style="list-style-type: none"> <li>• Self-sufficiency</li> <li>• Health</li> </ul>   |            |
| E. | Continue to improve messaging.  | Ongoing                      | Understanding that United Way's "product" is relationships with: <ul style="list-style-type: none"> <li>• Community</li> <li>• Donors</li> <li>• Volunteers</li> <li>• Partner agencies</li> <li>• Strategic alliances</li> </ul>  |            |
| F. | Demonstrate return on investment to community by developing data management and evaluation process. | 2009<br><br>2010<br><br>2011 | Research web based outcome tracking/data management software <ul style="list-style-type: none"> <li>• Hire intern at cost of \$1000</li> </ul> Purchase and install software <ul style="list-style-type: none"> <li>• Start up cost and 1<sup>st</sup> year fee estimated at \$7,000-\$10,000</li> <li>• Hire intern at cost of \$1500</li> </ul> Fully implement system by 2011 community investment cycle <ul style="list-style-type: none"> <li>• Annual fee estimated at \$5,000</li> <li>• Hire intern at cost of \$1500</li> </ul> |            |

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January 2009 - December 2011**

**Goal #2: Explore the viability and benefit of creating a community-wide volunteer program.**

| Objective |  | Projected Date of Completion | Accomplishments to Date   | % Complete |
|-----------|--|------------------------------|---|------------|
| A.        | Assess current programs in community   | Complete                     | Staff met with Lynn Allen to discuss volunteer services at medical center. Conversation included budget, staff requirements, recruitment and recognition of volunteers and need for a broader volunteer program in Hall County. Other assessment of local programs through informal conversation. Other than individual non-profits and faith-based groups, there doesn't appear to be a community wide effort around volunteerism. | <b>100</b> |
| B.        | Review programs fully supported by other United Ways   | Complete                     | Staff spoke with program directors in Macon, GA, Charlottesville, VA and Dalton, GA United Ways. Discussion included number of years program had existed, budget, staffing, competition for funding, successes and lessons learned. Indications are most programs are "project driven".   | <b>100</b> |
| C.        | Meet with representative from Hands on Georgia to assess that program and determine alignment with our community needs | Complete                     | Committee met with Laurie Nichols, CEO of Hands on Georgia. Laurie provided information about HOG model which is project-driven and primarily accomplished via website. Reviewed requirements for affiliation with HOG. There is possibility of some funding from HOG for program start up cost. HOG offered support in writing a business plan for UWHC. Maria Calkins, HOG board member, offered help.                            | <b>100</b> |
| D.        | Make recommendation to Board   | Complete                     | Affirmed that volunteer recruitment and recognition is an essential part of United Way's mission. It is also a crucial part of the Live United call to action of Give, Advocate, Volunteer.   | <b>100</b> |

|    | Objective                       | Projected Date of Completion | Accomplishments to Date   | % Complete |
|----|---------------------------------|------------------------------|---|------------|
|    |                                 |                              |   |            |
| E. | Develop plan for implementation | Ongoing                      | Business plan developed with proposed start up cost of \$82,000.<br><br>Incorporate into website development project<br><br>Assess staff and budget needs | <b>10</b>  |
| F. |                                 |                              |   |            |



| Objective | Projected Date of Completion                            | Accomplishments to Date  | % Complete |
|-----------|---|--|------------|
|           | Sept 30, 2009<br><br>Dec. 31, 2009<br><br>March 1, 2010 | Create partnership agreement that encompasses responsibility of both organizations and gift acceptance policies.<br><br>Prepare budget estimates for program including staff, marketing materials, technology and events.<br><br>Develop plan for rollout (internal and external). |            |
| D.        |   |  |            |
| E.        |   |  |            |
| F.        |   |  |            |

**Strategic Goals for United Way of Hall County  
September 2008 - August 2011**

**Goal #4: Create a comprehensive Marketing Plan.**

| Objective |  | Projected Date of Completion | Accomplishments to Date  | % Complete  |
|-----------|--|------------------------------|--|-------------|
| A.        | Review existing mission statement  | Completed                    | Revised mission statement to:<br><i>Uniting people, resources and organizations to improve lives in Hall County.</i>   | <b>100%</b> |
| B.        | Assess current marketing material  | Completed                    | Worked collaboratively with Wyngate Drive for assessment and action plan.<br><br>See attachment "A"  | <b>100%</b> |
| C.        | Implement action steps to meet objectives of marketing plan: <ul style="list-style-type: none"> <li>• Simplify United Way's message</li> <li>• Tell United Way's story comprehensively</li> <li>• Increase awareness of United Way as a resource to address needs in Hall County through giving, advocacy or volunteering</li> <li>• Educate our community about the population served by United Way</li> <li>• Diversify the revenue streams</li> </ul> | Ongoing                      | <ol style="list-style-type: none"> <li>1. Eliminate all incorrect and outdated information in any existing communication.</li> <li>2. Produce a month-by-month calendar of marketing tasks with attention to GIVE. ADVOCATE. VOLUNTEER.</li> <li>3. Provide e-newsletter template with relevant and interesting content/layout.</li> <li>4. Evaluate and increase email database</li> <li>5. Produce brochure applicable to campaign presentations and off-campaign promotion.</li> <li>6. Produce videos to tell how Hall County LIVES UNITED.</li> <li>7. Eliminate communication barriers in 2-1-1 print collateral.</li> </ol> |             |

|    | Objective  | Projected Date of Completion  | Accomplishments to Date  | % Complete                                   |
|----|--|---|--|--|
|    |  |   |  |  |
| D. | Design and development new website to serve as cornerstone for marketing plan. | Feb. 5, 2009<br><br>Feb. 5, 2009<br><br>Feb. 15, 2009<br><br>June 1, 2009 | Contracted with Full Media for design and development of site.<br><br>Contracted with Wyngate Drive to produce content of website.<br><br>Team meeting to submit ideas for key elements.<br><br>Website goes live. | <b>5%</b><br><br><b>5%</b><br><br><b>10%</b> |
| E. |  |   |  |  |
| F. |  |   |  |  |