

STRATEGIC PLAN: 3-YEAR WOKPLAN

STRATEGIC PRIORITY	OBJECTIVES	OPERATIONAL KPIS
1. Strengthen Community Impact Outcome KPIS: • 80% of partners and program participants indicate they know what UWFM's purpose and impact • 80% of priority programs meet identified outcomes	Objective 1.1 – Focus programming on a defined number of high impact community priorities, especially in Madera and rural communities	A. Increase in number of active initiatives in Madera and rural communities focused on identified priorities B. Increase in % of survey participants indicate programs and services reflect community needs (baseline is 44% in 2026)
	Objective 1.2 – Establish baseline data to measure programmatic outcomes	A. Increase in programs with defined outcomes and data collection plans B. Regular reporting cadence established (e.g., quarterly dashboards)
	Objective 1.3 – Clarify and communicate a data-driven value proposition that demonstrates impact	A. Clear articulation of 3-4 signature priorities approved by Board and used consistently in communications B. Increase in percentage of staff and board feeling confident in sharing impact stories C. Number of impact stories paired with data points annually (social, newsletters, briefings)
2. Grow a Financially Sustainable Organization Outcome KPIS: • At least 6 months of operational reserves maintained within 3 years • Year-over-year growth in organizational financial stability (e.g., net asset growth) • 100% of board members actively contribute to fundraising and organizational advancement	Objective 2.1 – Diversify and grow revenue streams beyond traditional funding sources. • Strengthen relationship-based donor stewardship and recognition • Implement data-driven donor segmentation and engagement strategies	A. % of total revenue from diversified sources (grants, corporate, public contracts, Tocqueville, etc.) B. Year-over-year growth rate by revenue stream C. Increase in number of retained and new funding sources secured annually
	Objective 2.2 – Develop and operationalize a multi-year development plan	A. Board-approved 3-year development plan with targets and timelines B. Donor engagement data is tracked, with an increase in donor touch points year over year C. Annual fundraising goals met or exceeded

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2. Grow a Financially Sustainable Organization (Continued)	Objective 2.3 – Build and maintain operational reserves	A. Establish a Board-approved reserve policy B. Grow unrestricted reserves resulting in (3) months by X date and (6) months by X date of operating capital.
2. Expand Organizational Capacity Outcome KPIS: • Audit and compliance reviews validate the effectiveness of current processes and governance • 100% of board members contribute to fundraising • 90% of staff report organizational culture is consistently reflected in decisions and behaviors	Objective 3.1 – Ensure core operational and financial systems and infrastructure is in place within our available resources	A. 100% on-time completion for monthly reconciliations, reporting, and required filings. B. Existing systems and technology are fully implemented to support efficient operations C. Financial controls, reporting cadence, and audit readiness are clear and consistent
	Objective 3.2 – Strengthen board engagement as strategic ambassadors, advisors, and active fundraisers	A. % of board members actively participating in fundraising B. % of board members engaged as active ambassadors and advisors (events, committees, etc) C. Board self-assessment results related to clarity of role and effectiveness
	Objective 3.3 – Create organizational culture with clear staff roles and functions, shared values, and commitment to growth Organizational Culture: “The shared system of values, behaviors, beliefs and norms that define how members of an organization interact, work together, and make decisions.”	A. Clear staff roles and functions align with strategic priorities and job descriptions B. 80% of staff complete a professional development activity annually C. Staff report clarity of career pathways and advancement opportunities



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