



Berkshire United Way



# INCREASING EQUITY TO BUILD A THRIVING COMMUNITY.

**2023–2026 Strategic Plan**  
FULL REPORT







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# A MESSAGE FROM BERKSHIRE UNITED WAY

## IGNITING THE COLLECTIVE POWER OF OUR COMMUNITY

**Berkshire United Way works with people throughout our community to understand their needs, challenges, and aspirations, and to promote pathways for individuals and families to thrive.**

We do more than fund impactful local programs, we also review data and emerging best practices to invest resources where they are needed most, where they can do the greatest good, and where we can earn trust to help build and sustain community partnerships.

Our data and the findings from the community assessment survey that informed this strategic plan demonstrate that many people in the community are struggling with economic security as well as with meeting their basic needs. Many of our neighbors wrestle daily with impossible choices about whether to pay for rent or utilities, food or medications, what to go without, and how to support themselves and their families when they can't make ends meet. Over time, when people must make these difficult choices, they aren't able to fully invest their time and energy to imagine and achieve the goals they've set for themselves or their family.

Berkshire United Way is focused on supporting individuals and families in our community who may be working but struggle with financial stability. These community members live above the poverty line but don't earn enough to be financially secure.

Early childhood education and learning readiness are among BUW's foundational commitments, and early exposure in the home to letters and numbers, sounds, reading, and conversation is integral to that commitment. When parents and caregivers struggle with basic needs and financial stability, young learners face significant obstacles to opportunity right from the start and are more likely to be at risk for many long-term challenges. Thus, economic prosperity and school readiness are inextricably linked and equally important to ensure a thriving community.





While income alone doesn't tell the entire story of how people in our community strive to achieve economic stability and access resources in the face of challenges, these stark disparities contribute to circumstances that make it harder for people to articulate, set, and achieve goals, or to fully thrive.

When our friends, neighbors, coworkers, and family members are forced to make difficult choices in their lives, our whole community faces the consequences. Everyone in the Berkshires should have the ability and opportunity to create stability and prosperity for themselves and those they love. As we launch our strategic plan, we will continue to listen to, learn from, and work to earn the trust of community members, organizations, and leaders who have lived and living experience to help us guide our work more effectively and to understand more deeply how we, along with partners, can invest to eliminate barriers and improve outcomes.

In addition to listening and organizing, this plan seeks to leverage all our resources — including fundraising, volunteerism, advocacy, community engagement, awareness, community data, collective problem-solving and solution building, strategic investments,

and more — and deploy them intentionally to help our neighbors achieve their goals, shaping and strengthening our community in Berkshire County for the next generation.

**A 2022 community survey conducted by the Berkshire Regional Planning Commission (BRPC) found that over half of respondents have less than six months savings at their disposal, with 15% having no savings. Among respondents making less than \$35,000, over half have no savings or less than two months of savings. Notably, the median household income for renters in Berkshire County is under \$34,000 (which represents 53.8% of the county median, and only 38% of the statewide median), at \$29,942. Black residents' median incomes are at 47.4% and 33.6% of the local and statewide medians, respectively; for Hispanic community members these data points are 98% and 70% of county and state statistics. Overall, lower-income earners and households represent close to 35% of the total county population.**





## MISSION, VISION & VALUES

Berkshire United Way's current mission, vision, and values, in conjunction with the focus areas identified above, guided the planning team in identifying the planning process' design principles.

### MISSION

Berkshire United Way ignites the collective power of individuals and organizations to build a stronger community together. We magnify your contributions to make lasting, positive change right here in the Berkshires. We are committed to supporting individuals and strengthening families where we live, work, and play. We are HERE FOR GOOD.

### VISION

Berkshire United Way works to ensure Berkshire County is a dynamic, engaged community with opportunities for all.

**There is a need and a desire to strengthen systems of support in the community by enhancing social service infrastructure, increasing access to information, and fostering intentional and inclusive collaboration.**

### VALUES

We believe in the people of Berkshire County. Therefore, we value building relationships, collaboration, results-driven decision-making, recognition of success, and ongoing innovation.

At the foundation of our values is the belief that to improve people's lives and our community, we must strive to ensure that BUW's staff, board of directors, volunteers, and partner organizations reflect and include the communities we serve. Berkshire United Way commits itself to enriching community experiences through the advancement of diversity, equity, inclusion, belonging, anti-racist, and anti-oppressive practices.

We believe inequitable systems prevent families from living their fullest potential lives and we believe in intentionally making decisions that provide fair treatment, access, and opportunity for all. Ultimately, we strive to look beyond diversity, equity, and inclusion, and hope all people feel they belong within Berkshire County and our community.



# EXECUTIVE SUMMARY

**Berkshire United Way (BUW) traces its roots to efforts that began in 1924 to support, serve, and strengthen the residents of Berkshire County.**

As the organization approaches its centennial, BUW's vision is that Berkshire County remains a dynamic, engaged community with opportunities for everyone to thrive. Working alongside and in partnership with individuals, businesses, and community organizations, BUW's mission is to ignite collective power to build a stronger community together.

Though the strategies that fuel this mission have shifted and evolved over the last century, BUW continues to magnify community resources to make lasting, positive change for Berkshire families, children, and at-risk populations. In 2022, BUW conducted a community assessment and strategic planning process that acknowledges the economic, educational, social, and public health disruptions of the COVID-19 pandemic in the Berkshires, recognizes growing structural inequalities and changing community demographics, and looks ahead to the organization's next 100 years of community leadership. This strategic plan seeks to further increase impact and extend pathways of success for the next three years.

The strategic planning process began with an internal team that worked closely with Luminary Evaluation Group to conduct an extensive assessment of Berkshire County needs. Through this process, BUW surveyed people throughout the community to collect varied perspectives and viewpoints; reviewed and reflected on their feedback; and shaped goals, strategies, and actions that will enable and empower the organization to strengthen and deepen its mission of service to people in Berkshire County.

**Looking ahead, data shows that community resources will continue to be strained, emphasizing the need for increased capacity, innovation, and dollars.**

**The Planning Team identified three high-impact goals that will focus Berkshire United Way's ongoing efforts:**

## GOAL 1

**Deepen collaboration, advocacy, and investment with partners who empower individuals and families to thrive.**

## GOAL 2

**Increase our capacity and resources to equitably support Berkshire County and expand community engagement with our mission and vision.**

## GOAL 3

**Strengthen our foundation to ensure we have the capacity and resources to serve the community, now and in the future.**

BUW will advance these goals by focusing on the strategies articulated in this plan. The planning team will continue to meet regularly to review and reflect upon the progress made as well as to monitor changing conditions in the community at-large, refining the plan as needed.





## JOIN US TODAY!

### Donate

Make an investment in Berkshire United Way now and help us build a more equitable future as we enter our next century of impact.

[berkshireunitedway.org/donate](https://berkshireunitedway.org/donate)



### Volunteer

The Berkshire United Way online Volunteer Center connects organizations that need assistance with interested volunteers looking to share their time and talent.

[volunteerberkshireuw.org](https://volunteerberkshireuw.org)





# INTRODUCTION

**Berkshire United Way has served people in the Berkshires by inspiring a spirit of hope, change, and action for nearly 100 years.**

Recent years have brought about unique changes and transitions — particularly as the community weathered the local effects of a global pandemic, reckoned with a deepening awareness and acknowledgement of systemic inequity, and understood the degree of economic need in every corner of Berkshire County. BUW remains resolute in our commitment to support people in the Berkshires as the community navigates these challenges and as the organization approaches its centennial year. Our dedicated leadership remains committed to building equitable pathways to prosperity for everyone in Berkshire County. Even as strategies and approaches have evolved since 1924, the core of BUW’s mission to ignite collective power to build a stronger community has not wavered.

This is a pivotal moment for Berkshire County. Understanding conditions, needs, and opportunities provides a lens for BUW to look back on how Berkshire County has changed, look closer at what has fueled

BUW’s positive impact, and look ahead to how we will collaborate and lead to build a brighter future for everyone. To capitalize on this opportunity, BUW engaged outside partners to embark on two related collaborative projects: first, a robust community assessment alongside Luminary Evaluation Group; and second, working with Civitas Strategies, a public-serving management consulting firm, to build on this data and utilize the Finding Your North Star™ strategic planning approach.

This strategic planning process and the resulting plan will position BUW for its next century of service. As part of the planning facilitation, Civitas Strategies worked alongside BUW staff and board leadership to 1) collect and analyze key community data to inform planning efforts; 2) define BUW’s strategic direction; and 3) identify the actions necessary to ensure a smooth transition from planning to execution to greater impact.



# LANDSCAPE ANALYSIS

**Strategic planning began in mid-2022 when Berkshire United Way began a community assessment focused on the aspirations, needs, and perspectives of community members.**

The assessment process focused on engaging community voices and expertise to enhance quantitative data analysis and research in issue areas important to BUW. It provided a comprehensive landscape analysis that would support responsive decision-making, continuous learning and improvement, and refocusing and realigning priorities for the future.

Specifically, efforts of the assessment sought to develop comprehensive answers to the following key questions:

- What limits community members from feeling empowered and connected — especially in the wake of the pandemic? What is working for community members to feel empowered and connected?
- What current barriers prevent community members from experiencing equitable access to opportunities and support services? How can BUW assist the community in addressing these barriers and improving access to services?
- What are the outstanding needs and gaps in services for Berkshire County? How are/can existing community organizations work together to meet those needs?
- What are the critical elements that offer every child a path to a bright future? How present are these elements in our community and how can we strengthen them?
- What opportunities exist in Berkshire County to help families achieve economic security and prosperity? How do families currently engage with these opportunities?

**Many Berkshire residents continue to struggle to meet their family's basic needs — primarily housing and food — due to cost of living and income inequality.**

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In addition, data collection activities for the assessment also explored the following key questions related to BUW's planning effort:

- Who does BUW serve and how does BUW engage with them?
- What is BUW's critical value to the community? What role do people in the community describe it playing?
- Where and how do systemic inequities create barriers to opportunity and success?
- In what areas does the community see BUW working currently, and what are the most significant unmet needs?
- Where can BUW have potential impact? How will that impact be measured?
- What new resources are needed to achieve impact? How can existing resources evolve or be transformed to realize the desired impact on the Berkshire community?

The assessment process began by collaboratively developing a framework of what and how to measure, providing an intentional focus for research and analysis. Data collection protocols focused on both qualitative and quantitative data and were designed to prioritize stakeholder engagement. Key quantitative data for the assessment was collected through a community survey and the use of outside data sets. Varied perspectives from residents and community members were gathered via qualitative activities and analysis including interviews and focus groups. These activities provide rich and important detail that supports and provides context for quantitative data analysis and findings.

It is important to note that though the data collection process generated a strong response from a variety of methodologies, include surveys, interviews, focus groups, and direct community outreach through partner organizations, there are still community voices that were not fully reflected in the responses. BUW recognizes that this process alone does not adequately account



for the full diversity of perspectives and lived and living experiences of people that BUW serves and seeks to serve through their work and collaboration with community partners. Thus, the implementation phase of this plan, including initial actions aligned with the plan's goals and strategies, involves further outreach, engagement, listening, and learning.

Upon collection, the data was analyzed by the Planning Team to identify opportunities to make greatest positive impact aligned with BUW's mission, core values, and current assets. This process resulted in the following findings.

## KEY COMMUNITY THEMES

- Since the start of the pandemic, many Berkshire residents continue to struggle to meet their family's **basic needs** — primarily housing and food — due to cost of living and income inequality.
- While Berkshire employers struggle to hire and fill vacant positions, working families and employees face barriers to **financial prosperity**.
- As a result of the pandemic, respondents identified an increased need to provide **wholistic support for families and children**.
- There is a need and a desire to **strengthen systems of support** in the community by enhancing social service infrastructure, increasing access to information, and fostering intentional and inclusive collaboration.

The depth and complexity of financial instability experienced by families in Berkshire County often goes unrecognized. Taken collectively, the community themes identified through the community survey demonstrate the everyday struggles of working families who are employed and who also struggle to meet basic needs. Berkshire United Way seeks to amplify the voices of community members and advocate for and with them.

## KEY ORGANIZATIONAL THEMES FOR BUW

- BUW has an opportunity to play a new/different/evolved role in **creating community-based solutions**.
- Respondents shared that in a world “reshaped by the pandemic,” BUW can bring people to the table and **foster authentic collaboration**.
- Through a **focus on advocacy**, BUW can bring visibility to these issues and provide a “unified voice” for the county.
- Looking ahead, data shows that community resources will continue to be strained, emphasizing the need for **increased capacity, innovation, and dollars**.

The Planning Team worked collaboratively first to develop Design Principles to guide the process then to align these principles with BUW's vision and mission. Using this framework, the team set goals and strategies for implementation over the next three years.



# DESIGN PRINCIPLES

The Planning Team determined that in the design of all systems, strategies, and supports contained within the 2023–2026 Strategic Plan, they will adhere to the following principles, both in planning the current strategy and determining any emergent strategy that may arise in the future.

Specifically, every BUW strategy must:

- Consider every action, initiative, and policy through a lens of Diversity, Equity, Inclusion, and Belonging (DEIB).
- Be innovative, flexible, and carried out with a commitment to consider new or different tactics.
- Be feasible in scope and appropriately resourced in terms of staffing, time, and organizational capacity.
- Align with our unique role and value to the community.
- Incorporate a change management approach, including clear action steps and metrics of success.
- Include tactics that support fundraising, donor engagement, and stewardship.
- Inform our advocacy agenda.
- Be transparent in decision-making and communication, clearly articulating what we do and why.
- Reflect the board's acknowledgement, endorsement, and support.

It is important to emphasize BUW's DEIB commitment. This organizational priority became increasingly central prior to this new strategic plan, and consequently the BUW staff and board brought an intentional approach to ensure the planning process aligned with and supported internal and external practices to advance diversity, equity, inclusion, belonging, anti-racist, and anti-oppressive practices wherever possible. **BUW's organizational commitment ensures that DEIB principles and values are foundational to this plan and integrated throughout its goals, strategies, and actions.**

**Through a focus on advocacy, we can bring visibility to these issues and provide a "unified voice" for the county.**

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**Berkshire United Way will realize its vision by focusing resources and efforts on three long-term goals, which are strategically aligned with our design principles and organizational mission, vision, and priorities.**

## GOAL 1

**Deepen collaboration, advocacy, and investment with partners who empower individuals and families to thrive.**

Among Berkshire United Way's strengths is the legacy of action, collaboration, and trust it has in the community. People countywide see BUW as an organization that can and should bring individuals and organizations together to shed light on urgent and emerging needs, then lead effective problem-solving. However, BUW cannot and should not tackle this process alone. Engaging partners — established and new — in community impact activities moving forward will be critical. In addition, BUW has prioritized ongoing community listening and conversations to facilitate engagement and ensure impact and funding priorities are based in the needs and aspirations of the community and are developed and refined in collaboration with people who have lived and living experience with the challenges and solutions being contemplated.

The core of BUW's community impact efforts involves engaging others to increase opportunities for individuals and families in Berkshire County to thrive, to achieve safety and security, and to have the ability to reach their own goals. Collaboration and inclusion are key to achieving this vision for the community, but it also requires working on shoring up the systems that provide support across the community. Consequently, BUW's strategies prioritize advocacy, incorporating community voices, data-informed public policy, and uncovering and addressing barriers that exist to building equitable pathways to prosperity. These efforts converge in a focus to support working families who struggle to meet basic needs, regardless of employment and access to supportive services.

### Measures of Success

BUW will use the following metrics to measure progress made toward Goal 1 of this Strategic Plan.

- Number of new participants engaged in convenings, leading to increased recognition of community needs, priorities, and gaps in services.
- Adoption of funding priorities that equitably reflect community needs and perspectives, as defined in collaboration with community members.
- Launch of pilot initiatives to address identified priorities and needs.
- Creation of a shared legislative agenda is created based on collaborative data and needs analysis.
- Evidence that BUW investments lead to improved outcomes related to community needs and priorities.

### Goal 1 Strategies

#### STRATEGY ONE

**Review and reframe BUW funding priorities.**

As a funder that works collaboratively with the community, BUW's community impact strategies must evolve in response to changing circumstances in the community. These priorities are grounded in the organization's vision and mission and reflect the values, concerns, and needs of the Berkshire community. Funding priorities are also data-driven, rigorously monitored, and evaluated. Consequently, the process of reviewing and reframing funding priorities incorporates community voices, perspectives, data, and feedback. Updated priorities will reflect a renewed focus to better support families who are employed yet struggle to meet basic needs.

### **Year 1 Actions**

- Create a timeline of action steps aligned with BUW's community grant funding timeline.
- Review and analyze community and funded partner survey, pilot, and convenings data.
- Identify and ask for feedback from additional community groups and leaders.
- Create recommendations for changes and present them to Community Impact Committee and Board.
- Identify outcomes/goals for new priorities, i.e., how will we know we have made a difference?

### **Year 2 Actions**

- Add updated priorities to new funding application.
- Align legislative agenda with funding priorities.
- Update marketing materials to reflect priorities.
- Create a plan to communicate revised priorities to donors.

### **Year 3 Actions**

- Evaluate the impact of revised priorities in addressing identified needs.

## **STRATEGY TWO**

### **Promote equity by streamlining the grant application and reporting processes.**

BUW is committed to embodying values of diversity, equity, inclusion, and belonging. This requires a deliberative approach to all actions and practices, particularly funding and grantmaking. The following actions address barriers that exist around establishing new connections and building strong partnerships. They aim to amplify under-represented voices and expand engagement with grassroots collaborations and innovative community solutions. By adjusting and streamlining these processes, BUW aspires to increase access and equity in their grantmaking.

### **Year 1 Actions**

- Maximize use of the Community Impact data platform.
- Pilot general operating support for 2023–2024 Community Impact grant cycle.
- Build collaborative partnerships with new and emerging organizations to deepen relationships and build trust.

- Incorporate qualitative/informal conversations in the grant management process.
- Allocate funds to support emerging needs and new partners.

### **Year 2 Actions**

- Assess general operating support pilot learnings and incorporate findings into new funding application.
- Update funding application to reflect updated funding priorities.
- Launch new funding application.
- Continue to build upon and expand new partnerships.
- Expand capacity support to partners through shared training opportunities and more one-on-one technical support.

### **Year 3 Actions**

- Assess the impact of updated funding application on grantmaking and adjust as needed.
- Assess impact and effectiveness of venture fund supported projects and build a pipeline from venture funding to the community impact grant process.

## **STRATEGY THREE**

### **Encourage collaboration by convening community partners.**

Convening and engaging community members is an important part of the role a United Way plays in a community. Berkshire United Way brings value through its ability to convene partner organizations and residents with diverse backgrounds and perspectives, operating in a way that is cross-sector and spans silos and issue areas. In this capacity, BUW can foster and facilitate partnership and collaboration, helping set intention and focus with shared space and resources.

In addition to creating opportunities for partners and community members to identify, discuss, and work together on issues of concern, regular convenings provide valuable networking, connection, and relationship building. This connectivity allows for information sharing and efficient resourcing that enables the community to better meet the needs of individuals, families, and children in the Berkshires.



### Year 1 Actions

- Assess the current landscape of collective meetings to identify areas where BUW can add value while avoiding duplication of effort.
- Assess and determine current internal bandwidth and budget.
- Schedule convenings based on identified needs and gaps and strategic plan priorities; associate outcomes for each.
- Assess impact using participant feedback and adjust accordingly.

### Year 2 Actions

- Refine convening models based on feedback as well as new and emerging needs.
- Assess and align funding priorities with new information and themes from convenings.
- Determine budget needs based on convening outcomes.

### Year 3 Actions

- Continue to assess impact, participation, and need for convenings.

## STRATEGY FOUR

### Seed/pilot collaborative initiatives with a thorough evaluative component to assess success.

In tandem with its role as a community convener, BUW encourages collective action that builds consensus for problem-solving. Moreover, BUW brings resources to the table, providing seed dollars to support local action. This also creates opportunities for empowerment, as community members and partners shape solutions and responses to the issues and challenges they identify. The actions below help expand social capital, then ensure a feedback loop to inform and evolve BUW processes.

### Year 1 Actions

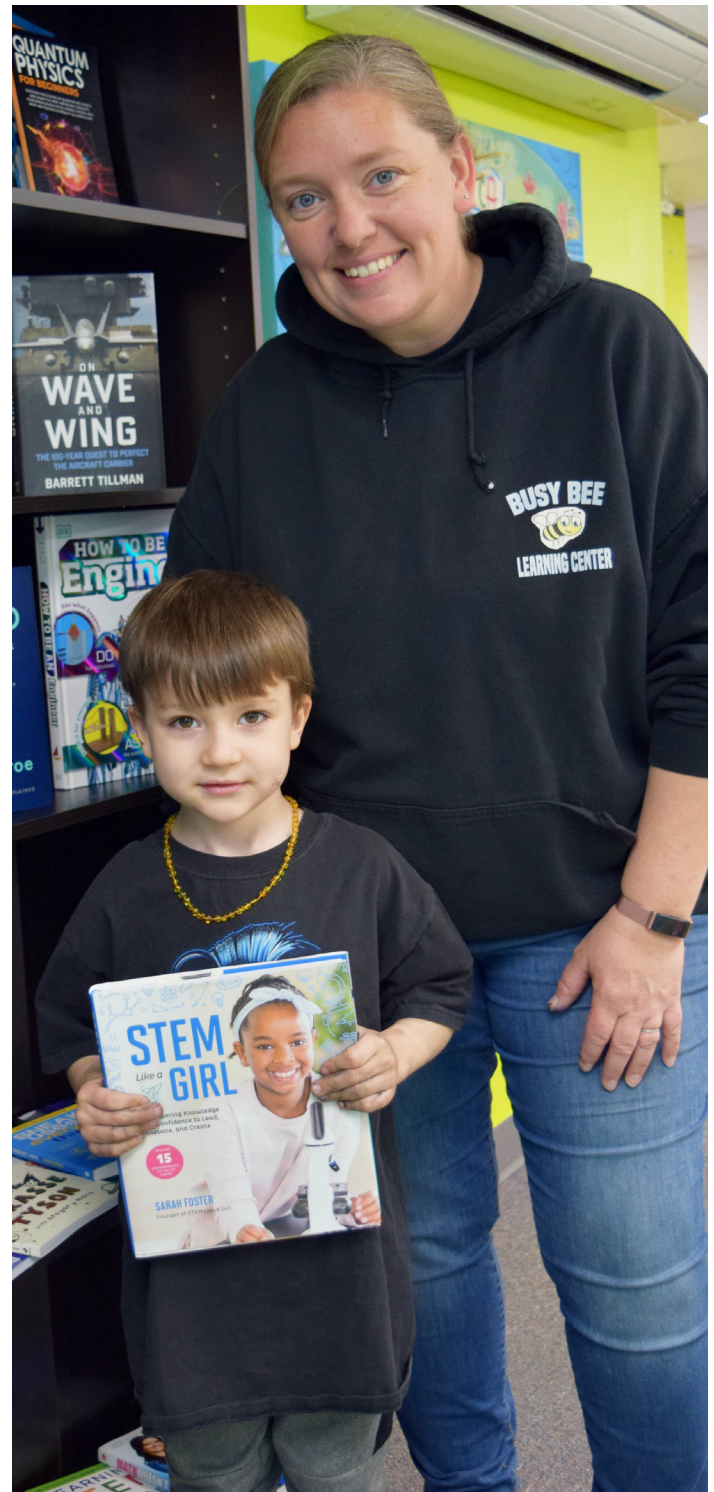
- Gather themes of need from launched convenings and assess the current landscape for each.

### Year 2 Actions

- Determine resources, needs, and capacity to fund pilots.
- Link emerging needs with best practices.
- Identify additional funding partners.
- Begin design phase for pilots.

### Year 3 Actions

- Finalize pilot design with evaluation.
- Launch pilot across several organizations.
- Establish regular check-ins, participant planning sessions, and formal reporting.
- Revisit/assess funding priorities with new information/themes from pilot learnings.



## **STRATEGY FIVE**

### **Work with community partners to articulate a shared legislative agenda.**

Achieving long-term community change also requires a renewed focus on public policy and adjusting the complex systems that affect family well-being. Organizations and nonprofits have the community knowledge about frontline challenges, but often have limited bandwidth and resources to advocate for needs and sustainable change. In the Berkshires, BUW has the expertise, leadership voice, and a broad base of trust to bring the sector together to increase awareness and push for policy change.

#### **Year 1 Actions**

- Launch regular elected official conversations to build relationships and share information with legislators and staff.
- Review themes from convenings for shared advocacy and policy needs; vet with participants.
- Work with other United Ways in Massachusetts to expand opportunities for shared advocacy.
- Create an advocacy work plan (meeting frequency, etc.).

#### **Year 2 Actions**

- Continue regular engagement with legislative delegation and staff.
- Review priorities with funded partners and other interested parties (including legislators) to reach consensus on legislative priorities.
- Launch formal legislative agenda, timed with legislative calendar, and monitor bill filings.
- Link to similar advocacy groups and share efforts.

#### **Year 3 Actions**

- Continue regular engagement with legislative delegation and staff.
- Assess impact of legislative advocacy efforts; refine and adjust as needed.





## GOAL 2

**Increase our capacity and resources to equitably support Berkshire County and expand community engagement with our mission and vision.**

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Berkshire United Way traces its roots to a local community fund that was founded in 1924. From those origins BUW became a trusted steward of public donations and an organizer of volunteer activities. As we move into a second century of investing in Berkshire County, we recognize the local economy has changed. This change includes new businesses, new residents living here and working remotely, and second homeowners and seasonal visitors, among others. This creates an opportunity and responsibility to advance and increase our core fundraising activities to improve and innovate beyond what has worked in the past. In this way we aspire to reach people whose capacity to invest in BUW's mission and efforts represents an area of potential revenue growth.

Increasing and leveraging financial resources is a key component of how we will execute the community impact goals in this plan. In addition, achieving measurable improvements for Berkshire County will require mobilizing people and resources to provide donors with the greatest return on their investment, as well as with increased satisfaction that their investment makes a positive difference in the community. Strategies within this goal focus on growing, sustaining, and diversifying funding, inspiring and increasing engagement, and strengthening relationships.

### Measures of Success

BUW will use the following metrics to measure progress made toward Goal 2 of this Strategic Plan.

- Overall increase in total dollars raised, plus annual increases in dollars raised and donors engaged for target segments.
- Growth in diversified revenue sources, including major gifts, grants, and planned gifts.
- Increase in new donors acquired by segment and target, and donors/partners retained.

- Heightened visibility and reach on key communication metrics.
- Meaningful volunteer cultivation and stewardship, leading to more volunteers participating, hours donated, and projects completed.

## Goal 2 Strategies

### STRATEGY ONE

**Develop and implement a comprehensive fundraising plan to diversify giving and increase revenue.**

Combined giving and community fundraising has been a hallmark of the United Way movement for over 100 years. However, shifts in the philanthropic landscape and the priorities of supporters require fresh approaches to building inclusive and long-term relationships with donors, large and small. In addition, data and software platforms will support BUW in finding efficiencies in processes.

#### Year 1 Actions

- Review all fundraising segments and determine 3-year goals, including any 100th anniversary special campaign.
- Create an inclusive and donor centric plan to increase individual gifts and workplace payroll deductions.
- Develop a Planned Giving brand and strategy to support 100th anniversary campaign.
- Review and refresh annual fundraising actions calendar.
- Update sponsorship menu for events and volunteer programming.
- Review prospect research software vendors and select a product.
- Review current fundraising and communication budget to implement new tactics.
- Implement database training for all fundraising staff to optimize the system's potential.

**Respondents shared that in a world “reshaped by the pandemic,” we can bring people to the table and foster authentic collaboration.**

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### **Year 2 Actions**

- Create a focused plan to increase corporate gifts, sponsorship, and grant revenue.
- Continue individual and employee/workplace giving plans, with a focus on increasing major gifts.
- Market and communicate Planned Giving opportunities with a 100th anniversary tie-in.
- Optimize prior year fundraising calendar and include 100th anniversary additions.
- Refresh donor recognition program to be more inclusive.
- Connect board members more deeply to fundraising and volunteer engagement activities.
- Review fundraising budget to increase the effective use of resources.

### **Year 3 Actions**

- Review past two years' fundraising results to assess the best tactics for retention and continued new donor growth.
- Capitalize on the results and impact of 100th anniversary activities.
- Survey donors and volunteers to determine additional ways to strengthen and increase fundraising results.
- Continue database review and improvements.

## **STRATEGY TWO**

### **Increase community awareness and engagement through communications and events.**

To achieve sustainable outcomes, BUW will need to expand communication efforts to reach both new and dedicated audiences. These efforts will allow the team to report on results and impact, invite diverse partners and parties to the table, deepen relationships and trust, and build involvement and participation.

### **Year 1 Actions**

- Review 2019 BUW re-branding to reflect strategic plan and DEIB communication priorities.
- Review all BUW produced events and create an event strategy (including 100th anniversary events and committees, annual award/recognition events).
- Refresh annual marketing plan to emphasize community visibility, awareness, and inclusive messaging (including 100th anniversary special communications).

- Review website theme and strategy and determine schedule for upgrades.
- Determine budget and timeline for professional photography/videography.
- Ensure vendor selection process and outreach for services supports equity and supplier diversity.

### **Year 2 Actions**

- Review refreshed marketing plan and update as necessary.
- Implement refreshed annual event strategy/recognition awards.
- Incorporate enhanced accessibility features as part of rollout of new website theme.
- Formalize the process for collecting donor/volunteer/agency stories and testimonials.
- Implement the refreshed brand in tandem with 100th anniversary celebration.
- Review and continue to implement inclusive messaging.

### **Year 3 Actions**

- Assess previous two years of events for successes and new opportunities.
- Review 100th anniversary actions and branding and decide ways to expand upon updated identity.
- Consider ways to continue to increase visibility and awareness.
- Review new website for continued DEIB and accessibility improvements.

## **STRATEGY THREE**

### **Increase volunteer engagement and satisfaction.**

Marshalling the hard work, energies, and passions of community members to serve their neighbors is a critical component of mobilizing resources to meet community needs. By focusing on volunteerism in the county, BUW can bring the time and talent of others together to make a difference where they live. Like those who invest financial resources, it is important to recognize and acknowledge volunteer contributions.



### Year 1 Actions

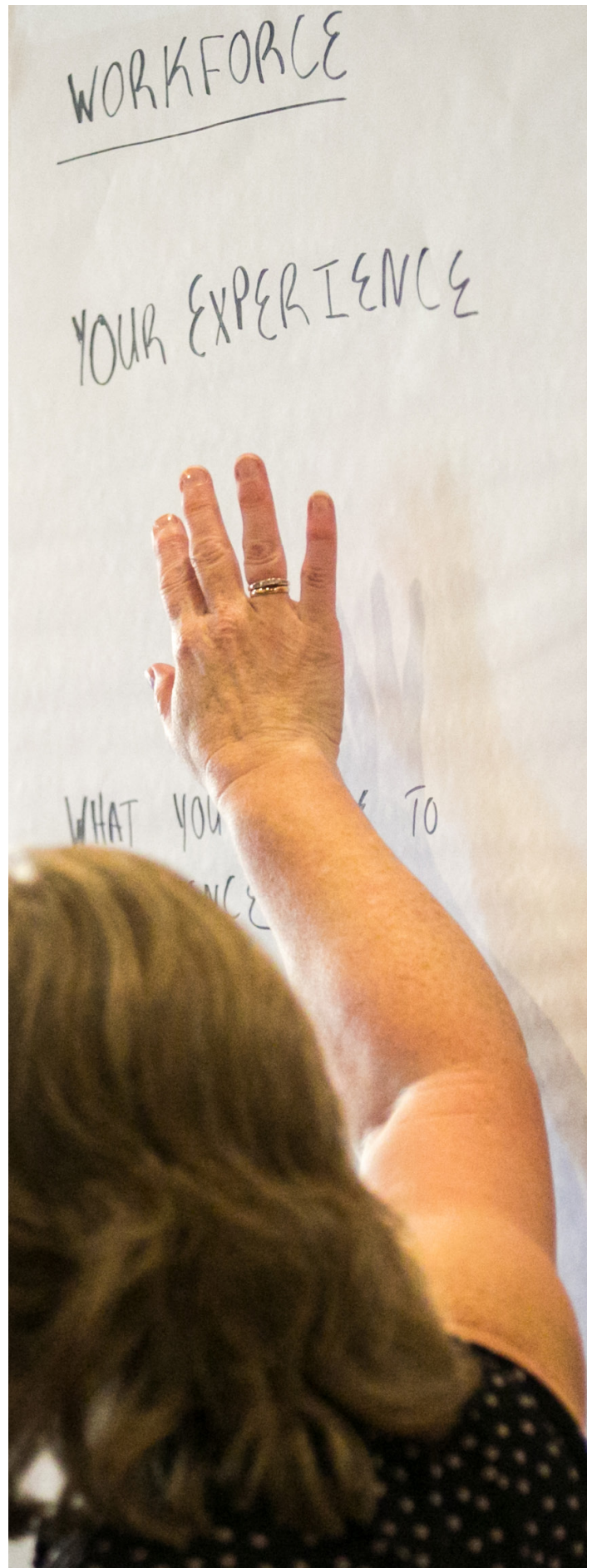
- Diversify our outreach to attract volunteers (volunteer fairs, networking, etc.).
- Strategize how best to attract new volunteers from business and organizations.
- Review use of online Volunteer Center and schedule trainings for internal staff and local nonprofits.
- Review local agencies and plan outreach to possible new volunteer programs.
- Review funded partner contracts and include information about the Volunteer Center.
- Create a communication calendar/plan for equitably engaging volunteers.
- Create a diverse volunteer recognition program.
- Define a process to integrate volunteer data into the development database.

### Year 2 Actions

- Create a quarterly check-in and new volunteer needs/opportunities process with agency partners.
- Create a strategy for attracting diverse (e.g., age, race, etc.) volunteers.
- Develop formal plan to update recognition lists on website; monthly social recognition; etc.
- Identify outreach and engagement opportunities for volunteers, specific to the 100th anniversary.
- Implement revised volunteer recognition.
- Determine collaboration for volunteerism with other United Ways and nonprofits.

### Year 3 Actions

- Reassess collaborations and outreach for volunteer program.
- Reassess quarterly check-in process.
- Survey existing individual volunteers to review results.
- Capitalize on the 100th anniversary momentum to engage new volunteers and opportunities.



## GOAL 3

### Strengthen our foundation to ensure we have the capacity and resources to serve the community, now and in the future.

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Berkshire United Way has a critical role to play in the future of the Berkshires. This responsibility reflects BUW's legacy of trust, born out of a history of community stewardship, financial management, as well as sound processes and administration. Looking ahead, though, BUW will need to evolve and strengthen to offer more, as the community needs more. Being a sustainable organization in the future will mean maintaining a commitment to excellence, while increasing internal capacity and resources for additional competencies, capacities, and functions. Internal operations, financial foundations, and human capital will take focus given present realities and future trends.

### Measures of Success

BUW will use the following metrics to measure progress made toward Goal 3 of this Strategic Plan.

- Investments made in capital and infrastructure to support long-term operational sustainability.
- Evidence of increased board and staff engagement, empowerment, and satisfaction.
- Evidence of increased board, staff, and funded partner diversity.
- Internal and external recognition that BUW lives and models its DEIB values.

### Goal 3 Strategies

#### STRATEGY ONE

##### Strengthen BUW's organizational foundation.

There are many ways BUW can grow and become a stronger organization, readying itself to be the United Way the community will need in the future. This will include examinations of finances, technology, infrastructure, facilities, and structure to ensure each contributes to future sustainability. In many ways, it is difficult to know what the future holds — especially in the current, rapidly changing environment — but these foundational elements will support BUW in its ongoing evolution and growth.

#### Year 1 Actions

- Assess capital, endowment, and investment opportunities.
- Determine if our facility and fixtures meet the current needs of the organization.
- Review internal technology, software, hardware to best support operations and strategic priorities.
- Review and update financial sustainability plan.
- Continue quarterly IT reviews.
- Revive merger conversation with Northern Berkshire United Way (NBUW) to determine feasibility of increased collaboration.

#### Year 2 Actions

- Monitor financial sustainability plan and recalibrate based on changing data.
- Review facility assessment and budget for implementation.
- Continue merger conversations (subject to Year 1 feasibility).

#### Year 3 Actions

- Monitor financial sustainability plan and recalibrate based on changing data.
- Continue merger conversations (subject to ongoing feasibility).

#### STRATEGY TWO

##### Model DEIB values internally and externally.

Our commitment to diversity, equity, inclusion, and belonging (DEIB) guides Berkshire United Way's work both internally and externally. Included throughout this plan are actions that intentionally and authentically build DEIB capacity and habits, meaning these become how the organization and its team function. For BUW, the commitment that "everyone matters in Berkshire County" begins first with the staff and board, how they listen and learn, how the community is engaged, how they hire, recruit, and develop, and how the organization operates every day.

#### Year 1 Actions

- Strengthen connection and collaboration between DEIB and other board committees.
- Review communication and marketing plans and strategies for effectiveness in communicating BUW's DEIB commitments.



- Pilot an equity indicator in team performance assessments.
- Ensure the content of job descriptions and reach of job postings yields more diverse applicant pools.
- Review and select best practice resources (from United Way Worldwide [UWW] and other sources) to advance equity commitments.
- Develop community engagement plan to receive feedback on BUW's equity efforts.
- Participate in 3–4 community outreach and engagement activities.
- Identify board and staff training needs.
- Conduct 1–2 DEIB training workshops for board and staff.

#### **Year 2 Actions**

- Assess results of Year 1 actions and recalibrate based on changing data.
- Share results with board and community.
- Migrate focus from DEIB to equity.
- Participate in 3–4 community outreach and engagement activities.
- Conduct 1–2 DEIB training workshops for board and staff.

#### **Year 3 Actions**

- Assess results of Year 2 actions and recalibrate based on changing data.
- Share results with board and community.
- Update community engagement plan.
- Participate in 3–4 community outreach and engagement activities.
- Conduct 1–2 DEIB training workshops for board and staff.

### **STRATEGY THREE**

#### **Increase team engagement, empowerment, and satisfaction.**

Focusing on staff development and retention reflects a recognition that the BUW team is one of the organization's most important assets. Investments in their growth, engagement, and commitment see strong returns to BUW's mission and community outcomes. Staff training, development, coaching, and recognition, as outlined in the

actions below, supports team members in building skills, competencies, and affinity. This is universally recognized as a strategic tool for continued growth and productivity.

#### **Year 1 Actions**

- Engage the HR committee in team development.
- Conduct team performance reviews and set shared goals, including professional development plans.
- Establish cycle for performance check-ins, including informal coaching.
- Review team compensation against industry benchmarks.
- Formalize team recognition processes.
- Tie HR salary actions to performance.
- Create and conduct team satisfaction survey and review results with HR committee.
- Hold 1–2 team off-site meetings.

#### **Year 2 Actions**

- Conduct team performance reviews against shared goals and update as appropriate.
- Continue performance check-ins, including informal coaching.
- Continue team recognition efforts.
- Hold 1–2 team off-site meetings.
- Encourage 100% workplace campaign participation by team members.
- Develop formal leadership and staff succession plans.



### **Year 3 Actions**

- Conduct team performance reviews against shared goals and update as appropriate.
- Continue performance check-ins, including informal coaching.
- Continue team recognition efforts.
- Hold 1–2 team off-site meetings.
- Encourage 100% workplace campaign participation by team members.
- Review team compensation against industry benchmarks.
- Conduct updated team satisfaction survey and review results with HR committee.

### **STRATEGY FOUR**

#### **Increase board engagement, empowerment, and satisfaction.**

The importance of investing in human capacity for future success extends to BUW's Board of Directors. This high-functioning body is poised for continued growth and future leadership, given appropriate investments in its structure, training, and performance. As board members also serve as the organization's community ambassadors, the actions outlined here seek to deepen their engagement and investment across all BUW activities.

#### **Year 1 Actions**

- Update board attribute list and board development plan to strengthen equity through board recruitment.
- Recruit and onboard at least four new board members.
- Create and conduct board satisfaction survey and review results with executive committee and full board.
- Continue to strengthen board engagement at the committee level.
- Establish marketing committee.
- Encourage board members to be involved as donors, volunteers, and advocates.

#### **Year 2 Actions**

- Follow the board development plan to recruit and onboard at least four new board members.
- Engage community partners in board recruitment.
- Assess board satisfaction and performance against shared goals and recalibrate based on feedback.
- Encourage board members to be involved as donors, volunteers, and advocates.

### **Year 3 Actions**

- Follow the board development plan to recruit and onboard at least four new board members.
- Assess board satisfaction and performance against shared goals and recalibrate based on feedback.
- Encourage board members to be involved as donors, volunteers, and advocates.

### **STRATEGY FIVE**

#### **Enhance collaborations to expand scope and effectiveness of BUW's programs.**

With this plan, there is a clear opportunity to raise BUW's profile and reach across and beyond Berkshire County, as partners with community knowledge and connections. These will help raise awareness and advocacy at a regional level, which will be necessary to bring systemic changes needed on issues that affect individuals and families in the Berkshires.

#### **Year 1 Actions**

- Work with Council of Massachusetts United Ways (COMUW) to provide regional perspective on shared policy advocacy related to housing and community mental health needs.
- Increase BUW team participation on local, regional, and state committees and working groups as appropriate.

#### **Year 2 Actions**

- Work with Council of Massachusetts United Ways (COMUW) to determine policy and legislative priorities for the year.
- Build awareness of BUW team members as presenters, subject matter experts, and thought leaders in addressing community challenges.

#### **Year 3 Actions**

- Work with Council of Massachusetts United Ways (COMUW) to determine policy and legislative priorities for the year.
- Assess effectiveness of BUW's thought leadership and adjust as appropriate.



# IMPLEMENTATION & EXECUTION

**This strategic plan will permeate every level and activity undertaken by BUW's staff and volunteer leadership. The move from strategic planning to execution requires the facilitation of three distinct phases: Design, Launch, and Implementation.**

The **design phase** was completed as part of the development of this plan. In this phase, we engaged key internal parties and external community members and partners in the planning to ensure buy-in, relevance, and practicality. Specifically, we achieved this by:

- Collecting and assessing information on the state of the organization and the landscape from a cross-section of leadership, staff, external thought leaders, partners, and community members;
- Engaging selected leadership and staff in the planning effort;
- Testing the plan as it was being crafted with additional organizational staff and leaders; and
- Consulting the Board of Directors during the development and review of the plan prior to presenting it for adoption.

Once this plan is completed, the BUW team will implement the initial **launch phase** within 30 days of finalization. In this phase, the President and CEO will review the plan and its commitments with:

- All employees and board members.
- Selected external and community partners.

Giving attention to operationalizing and executing the strategic plan will help ensure its implementation and success. This process will help align and reinforce actions and initiatives organization wide. Moreover, these actions will continue to build a culture where strong strategy and solid solutions are valued and prioritized. Ongoing assessment, reporting, iteration, and adjustment will ensure progress toward the bold goals outlined in this plan and the vision BUW has for the community.

The **implementation phase** will begin with the adoption and public launch of the plan. Critical to the initial launch will be alignment of funding priorities and the annual budget process with strategic plan commitments and resource needs.

Once the plan is underway, the President and CEO will track plan progress at least monthly with the planning team. These sessions will review progress on implementation, evaluate the indicators of success, and identify and problem-solve implementation risks and challenges. The planning team will consider the strategic plan when making any major organizational decisions and incorporate plan objectives into their personal development goals at all levels. Finally, the President and CEO will provide an update on implementation to the Board of Directors at each board meeting, with focused updates and reflection at least quarterly.

In subsequent years the planning team will assess progress against annual strategies and actions, report on progress, and review community data for evidence of positive impact as well as for consideration of external factors may influence plan implementation positively or negatively. Based on this information the President and CEO, planning team and the board will recalibrate strategies and actions based on data throughout the life of the plan.

**Berkshire United Way has an opportunity to play a new/different/evolved role in creating community-based solutions.**

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**2022–2023**

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COMMUNITY VOLUNTEER

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**Gretchen Weber**  
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*\*Strategic Planning Team Member*

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*#HereForGood*



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