



UNITED WAY
Lancaster County

2025-2028 Strategic Plan

2025

Impact Strategy

Mission:

To advance the education, economic mobility, and health of our community by mobilizing resources, people, and organizations.

Problem Statement:

The needs of the community are greater than any one organization can solve due to lack of resources, organizational capacity, and collaboration.

Who We Work With:

Lancaster County households below the ALICE threshold, which is 36% of local households, that need access to resources supporting improved education, economic mobility, and health.

Nonprofit organizations that serve our community and whose work improves education, economic mobility, and health.

Vision:

An equitable Lancaster County where every individual has an opportunity to succeed, and the entire community thrives as a result.

Strategy:

Empower struggling individuals and families, as well as the organizations that support them.

Impact ALICE families (who make up 36% of Lancaster County families) through internal programs and capacity building.

- VITA—10% increase in ALICE neighbors served annually for the next 3 years
- 211 —10% increase in answered calls from Lancaster County ALICE neighbors annually for the next 3 years
- Nonprofit capacity
 - Grantmaking: Realign grantmaking process to partner exclusively with organizations who serve ALICE population, track metrics of ALICE neighbors served through our partnership agencies
 - Training: Continue to deliver training to nonprofits that builds organizational capacity
- Convening: Be a trusted resource for system-wide needs
- Launch Nonprofit Center



Executive Summary

By 2028, United Way of Lancaster County (UWLC) will be recognized as a trusted and empowering force in the community, uniting people through focused strategy, clear messaging, and operational excellence.

To achieve this vision, the strategic plan outlines four core goals designed to guide UWLC's direction and deepen its impact:

GOAL ONE

BUILD TRUST AND IMPACT THROUGH OPERATIONAL EXCELLENCE

UWLC will ensure the organization is rooted in clear communication, robust systems, and a strong internal culture. Key efforts include improving board functionality, identifying a new physical space, and implementing tools like a decision-making matrix and an internal dashboard. Policies, procedures, and strategic alignment will support both accountability and transparency.

GOAL TWO

FOCUS PROGRAMS AND RESOURCES WHILE ENCOURAGING INNOVATION

UWLC will sharpen its focus on core programs that deliver the greatest impact in Lancaster County. A mission impact and profitability analysis will guide decisions around program continuation and resource allocation. An annual stakeholder convening will help direct grantmaking priorities, and dedicated funds will support innovation and emergency needs.

GOAL THREE

CLARIFY AND AMPLIFY BRAND EXPRESSION

To strengthen community engagement, UWLC will simplify and elevate its brand. By adopting United Way Worldwide's branding, refining audience-specific messaging, and investing in storytelling and visibility, the organization will ensure stakeholders understand its work and how to engage with it.

GOAL FOUR

DIVERSIFY FUNDRAISING STRATEGIES

Moving beyond the traditional annual campaign, UWLC will conduct a fundraising audit and expand programs such as planned giving and major gifts. New cases for support, stronger donor cultivation pipelines, and a more strategic use of donor data will support financial sustainability and growth.



Each goal is supported by clear KPIs and measurable strategies to track progress. Together, these priorities will ensure that UWLC remains a responsive, effective, and deeply connected community leader.

This is a three-year plan. Some of these activities will likely go beyond the 2027-2028 board year. Therefore, in two years, UWLC will undertake another strategy session to validate or adjust the goals of this plan.



2025-2028 Strategic Plan Vision Statement

By 2028, UWLC will be recognized as an organization that empowers the Lancaster County community – leading and serving through focused strategy, clear messaging, and operational excellence, to unite people and support and strengthen our neighbors.

Operational Excellence

UWLC defines operational excellence as:

- 01** Clear, timely, and transparent communication, supported by
 - Organized data
 - Donor transparency
 - Clear expectations
 - Functional and documented policies and procedures
- 02** A developed strategy screen and decision-making matrix
- 03** A positive culture that includes
 - Living our values intentionally
 - Diversity at all levels of the organization
 - An inviting and psychologically safe environment
- 04** Accountability to our community and each other through
 - Financial sustainability and accurate reporting of UWLC's financial status
 - Understanding and utilizing data and trends
- 05** A staffing model that aligns with UWLC's goals
- 06** Sufficient technology to do our work
- 07** Financial stability balanced with mission impact

Goal 1

We will have trust and impact through operational excellence so that Lancaster County residents value our role in the community.

KPIs

- Conduct a baseline survey to the community in 2026-2027, then follow up in 2031-2032 on perceptions of UWLC
- Board analysis identifies gaps, and they're addressed appropriately
- UWLC finds a new home
- UWLC dashboard is updated and used monthly
- Policies and procedures are documented and accessible to all
- Conduct a climate study and implement findings accordingly

01 | UWLC will have developed and implemented a strategy screen and decision-making matrix based on organizational values and priorities

- Conduct a strategy screen/decision-making workshop so that everyone knows how to use these tools

02 | UWLC will ensure consistency and focus in everything it does

- Create a calendar of check-ins on organizational priorities and goals
- Update the UWLC dashboard to reflect goals and priorities for the span of the strategic plan

03 | Board composition and functionality will align with organizational goals and operational excellence

- Review board composition and conduct a gap analysis to identify missing skills
- Adjust the board subcommittee structure, if necessary, to align with the goals in the strategic plan

04 | UWLC's facilities will support its mission and culture

- UWLC will form a facility task force to find a new home

05 | UWLC will have up-to-date, effective, and documented policies and procedures

- UWLC will review current policies, revise as necessary, and write policies where there are current gaps

06 | UWLC will strengthen its internal culture to improve connections to each other and the broader Lancaster community

- UWLC will conduct a climate survey to identify areas of focus and improvement
- UWLC will clarify roles and expectations at all levels of the organization
 - Define success for every team member
- UWLC will create consistent opportunities to gather and "break bread"
 - Continue retreats
 - Celebrate wins regularly
 - Create more intersections between the board and staff
- UWLC will create a culture of service

07 | UWLC will analyze programs and grant allocations for mission impact and profitability

- UWLC will use the book Nonprofit Sustainability to determine where programs live on the mission impact/profitability axis and make adjustments accordingly to ensure financial stability and mission impact
- UWLC will continue providing 211 services for counties other than Lancaster County only if they are able to compensate UWLC for the full cost of services



Goal 2

UWLC will focus its programs and services around the impact strategy outlined in the attached document, including allocating some resources each year to flexibility and innovation to address emerging needs.

KPIs

- Mission Impact/Profitability analysis is completed, and programs and services are adjusted accordingly
- Data sets for decision-making are identified and used to make decisions on grant allocations, convening, and partnerships
- UWLC has a written impact strategy and will have adjusted programs and services to align with that strategy

01 | UWLC will use data and convening to identify and lead change on the greatest needs impacting the ALICE population.

- UWLC will determine which data sets are most important to identifying community needs
- UWLC will develop a process for connecting with stakeholders (convening) on community needs

02 | The organization will create an annual process to determine where grant funds are most needed, and align with the needs of the ALICE population.

- UWLC will define "emergency needs"
- Each year, assign a portion of UWLC's resources to flexibility and innovation

03 | Convene stakeholders annually to inform the work of UWLC

04 | The organization will use the data collected from the above activities to have a facilitated discussion on what the UWLC impact model is

Goal 3

UWLC will clarify and simplify its brand expression to make it more compelling and engaging for stakeholders, so they know how to work with the organization.

KPIs

- UWLC adopts United Way Worldwide's new brand guidelines
- Activities to define audiences, develop messages, and use correct channels are completed
- A metric for tracking improved visibility is identified and tracked



- 01 | UWLC will adopt United Way Worldwide's new branding guidelines as soon as possible
- 02 | UWLC will define its audiences and create key messages and optimal channels for each
 - UWLC will consider working with an agency to assist with the following
 - Update the website
 - Review and adjust communications channels based on who the target audiences are and which channels they prefer
 - Create concise talking points (i.e., elevator pitch)
 - UWLC will speak with "one voice" about programs and services, while implementing channel best practices and audience-centric messaging, even though target audience messages may flex (July 1, 2026)
- 03 | UWLC will produce more emotional, timely, and authentic stories
 - Increase the use of video
 - Regularly update a "story bank" to keep things fresh
 - Invite partners and fund recipients to share UWLC impact stories (both partners share stories with UWLC, and UWLC invites partners and requires fund recipients to share at least one UWLC story on their channels)
- 04 | UWLC will invest resources in becoming more visible throughout Lancaster County to be a leader in solving the County's biggest challenges
 - Signage
 - Media
 - Track media hits on new dashboard (January 2026)
 - Thought leadership/speaking opportunities
 - Track speaking engagements, presentations on dashboard (January 2026)
 - Community visibility

Goal 4

UWLC will invest in fundraising strategies that go beyond the annual campaign, so it has a broader diversification of revenue streams and thereby ensuring financial stability.

KPIs

- A fundraising audit is completed
- Cases for support are written and shared with donors
- Key fundraising programs are developed or expanded (Legacy, Tocqueville Society, etc.)
- Fundraising progress is included in the UWLC dashboard

- 01 | UWLC will conduct a fundraising audit to identify strengths and opportunities for revenue diversification
 - Create cultivation/re-engagement strategies for lapsed donors
- 02 | UWLC will create cases for support for various donor audiences
 - Test messaging statements with various donor segments to continually refine and improve donor messaging (see Goal 3:2)
- 03 | Create or expand important fundraising programs
 - Legacy/Planned Giving Program
 - Major Gift Program (Tocqueville Society)
 - "Meet" with every leadership donor
 - Grow Tocqueville and other affinity programs (Women United)
 - Relationship pipeline for individuals and businesses
- 04 | Use board member networks and the Board's fundraising subcommittee to strengthen existing relationships and cultivate new ones
- 05 | Ensure that the CRM is used to its fullest potential and that UWLC is maintaining clean and accurate donor records for data and trend analysis
- 06 | Create a staff culture of philanthropy





UNITED WAY

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