



Strategy 2025-2027

Mission: UMC plays a pivotal role in providing financial backing and organizational support to strengthen nonprofits in Knox and Waldo Counties.

Vision: United for a Stronger Community

UMC is a leading provider of financial and organizational support to nonprofits in Knox and Waldo Counties, allowing them to more effectively achieve their missions. Together we create greater impact and serve more people.

Values

Integrity: We are committed and accountable to the public good

Transparency: We offer clear, easy to understand access to information about how we manage our operations

Responsibility: We monitor the stewardship of resources

Service: We are responsive to, and advocates for, our partner agencies

Collaboration: We recognize our community is stronger when we *all* work together

Operations

- **Goal: Grow the endowment**
 - Create an investment committee
 - Review Investment Policy
 - Review investment allocations to maximize gains
 - Add fundraising initiatives to solicit gifts for endowment
 - Board commitment to endowment
 - Planned giving targets
 - Education
 - One on one conversations
- **Goal: Draw 6% or less from the 36 month average endowment value**
 - Continue to apply for project related grants
 - See maximizing gains above
- **Goal: Strive to spend as close to 100% as possible of monies raised on grantmaking rather than operational expenses**
 - Continue to explore allocations for programming that can be considered a benefit to grantees
 - Remove all language on the website/marketing materials that implies we give 100% pass through



United Midcoast Charities

- Educate about the programs we have outside of Grants
- Supplement the 6% from endowment when needed with a draw from the Grants Account to support the administration of the program and other grantee benefits.
- **Goal: We are committed to keeping our data as close to 100% secure as possible.**
 - Managed services contract with IT provider
 - More utilization of the secure drives
 - Regular education of staff and board on best practices

Grants

- **Goal: Fund 100% of the ask at the \$5,000 and \$25,000 cap**
 - Evaluate the maximum ask and allocation amounts annually with a goal of giving larger grants once we've reached close to 100% at the \$25,000 cap.
- **Goal: Fund no less than 75% of the agencies that fit within our 4 focus areas: Housing, Food, Health & Safety, Economic Security**
 - We will not rotate focus areas, but will aim to reach as many as we can within all 4 each year for maximum impact.
 - Outreach to organizations that may not be applying
- **Goal: Clarify the grant and urgent needs programs for consistency**
 - We will continue to fund programs and/or operations.
 - We will not fund: capital expenses, endowments, private schools, sponsorship of events, lobbying, funding to support annual, appeals, conferences, or seminars.
 - We will put these guide rails on both the general grant and urgent needs grant applications.

Development Goals

- **Goal: \$675,000, \$725,000, \$775,000 three year grant distribution targets**
- **Goal: Increase Fee for Service revenue to support operations**
 - Charging non-grantees, and potentially grantees, to attend LEARN @ UMC events
 - Poised to work with additional municipalities managing their grant process for an administrative fee.
- **Goal: Diversify funding mix**
 - Enroll 2-4 workplace giving locations annually with at least one offering a match
 - Increase monthly donors
 - Increase number of individual donors who are under 50 years old
 - Grow pool of major donors
 - Increase number of private grants we receive
 - Increase number of business sponsors

Outreach

- **Goal: UMC will rebrand within 3 years**
- **Goal: UMC will increase brand awareness throughout the community**
 - Visibility at Gingerbread House Contest
 - Visibility at Volunteer Recruitment Event



United Midcoast Charities

- Explore running a Golf Tournament
- Additional Marketing (explore radio, MaineBiz Giving Issue, Villager running piece)
- Focus on places/efforts relevant to individuals under 50
- Pilot a Jr. Grants Committee
- **Goal: Annually increase the number of people who have a personal experience with UMC**
 - Target 8 house parties for education
 - Monthly Programs
 - Bi Monthly Newsletter
 - Increased Social Following
 - Relevant events
 - Cultivate longtime donors
 - Cultivate major donors
 - Grow Volunteer Pool

Program

- **Goal: UMC will increase relevancy as a resource, providing added value to agencies and nonprofits beyond grant funding**
 - Capacity Building Support
 - iWave Prospecting & Screening Support
 - Foundation Directory Online
 - Volunteer Recruitment Event
 - Resources/Education
 - LEARN@UMC (leveraging & engaging area resources & networks)
 - Networking by focus area
 - LGL Users Group Host

Board Recruitment

- **Goal: UMC will diversify and right size its board of directors to 12-15 members**
 - Annual self assessment to find areas of need
 - Age range, skills, focus area passions, connections to community members
 - Explore Jr. Board/Ambassador Group for younger people or those newer to the community - without the voting and fiduciary responsibilities, more social
- **Goal: UMC will define and implement a board nominating, recruiting and vetting process**
 - Nominating & Recruitment policy to be solidified
 - Vetting to include a state background check, iWave research, interviews with the board chair, executive director and others on the board.
- **Goal: Continue to engage former board members**
 - Pilot reengaging past board members through an alumni event.
 - Recognize at events