UNITED WAY OF WEST FLORIDA

United Way of West Florida is a local 501(c)(3) non-profit organization that Unites nonprofit agencies, organizations, businesses - and people - to fight for the health, education, and financial stability of every person in Escambia and Santa Rosa counties.

MISSION

United Way of West Florida's mission is to Unite our community and leverage resources to improve lives.

VISION

A community United to create better opportunities for all.

VALUES

Impact
Unite and leverage resources to improve lives

Collaboration
Build partnerships and engage people

Diversity, Equity, and Inclusion
Value and respect every individual

Advocacy
Advance policies that help our community

Innovation
Drive and lead change and advancement in thinking, doing, and giving
PRIORITIES

United Way of West Florida is committed to finding long-term solutions to critical community issues.

The United Way of West Florida Board of Directors, partners, agencies, donors, and staff provided input and actively helped shape this plan for our future. We identified three strategic priorities, which are the basis for aligned goals and strategies that will drive the organization's efforts over the next five years.

TRANSFORMATIONAL INVESTMENTS
Investing financial resources in efforts that transform the community.

CAPACITY BUILDING
Securing, maximizing, and diversifying resources to grow our team and community organizations.

CONNECTING
Connecting people to essential resources to improve lives.
## GOALS & ACTIONS

**2022 - 2027**

United Way of West Florida’s strategic priorities and values provide the foundation and framework for each goal and action in our strategic plan.* The value of *Diversity, Equity, and Inclusion* has been elevated as a filter for each goal and action statement.

### Goal

**We invest $4.5 million in the community through program services, leveraged dollars, volunteer resources, and community investment.**

**Increase the number of Tocqueville donors to 15**

**Achieve 8 total program partnerships/collaborations**

### Actions

- Increase revenue (RUM) by 35%
- Diversify any one source of income to no more than 20% of total revenue
- Maximize Small Business Circle engagement
- 100 for 100th campaign
- Create donor strategy (new and current), includes Step Up, multiyear donor commitments, donor lapse
- Engage corporate partners through updated strategy
- Initiate updated collaboration model
- Reengage Women United and Emerging Leaders
- Board engagement to foster potential donor relationships
- Identify key areas of community need
- Create win/win value-based collaboration model and process to solve community issues
- Facilitate education sessions to promote updated model
- Roll out model and processes to community

*United Way of West Florida’s Strategic Scorecard contains additional information about goals, measures, and actions.*
<table>
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<tr>
<th>Goal</th>
<th>Actions</th>
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| Increase community volunteer hours by 25%                            | • Engage and educate the community about Get Connected, RSVP and other opportunities  
• Increase social media engagement by sharing success stories and other education marketing |
| Achieve 4.30/5.00 employee engagement                                 | • Expand program staff to include education and health managers  
• Fully staff UWWF                                                                                                                       |
| 90% of agencies that were unable to achieve certification meet requirements during second attempt |                                                                                                                                                                                                             |
| 75% of all county and municipal governments in our 211 service area contribute funding for 211 | • Engagement strategy for key stakeholders, includes data based presentation  
• Care coordination strategy  
• Training and scheduling plans                                                                                                             |
| Increase from 15 hours/7 days to 24 hours/7 days crisis line (211) blended information and referral service | • Add internet chat function for communication with 211  
• Add funding to support inclusion in 211 Counts national platform                                                                                                                   |
| Increase 211 chat contacts by 25%                                    | • Build structure and strategic plan for Financial Stability Coalition  
• Grow Financial Stability Coalition                                                                                                           |
| Aid 100 households, with 60 achieving increased assets through financial coaching program |                                                                                                                                                                                                             |
UNITED WAY OF WEST FLORIDA
Bullseye

The bullseye is a tool for prioritizing big aims. This bullseye reflects immediate and future strategic opportunities for the United Way of West Florida team.

**Experiment & Explore**
What is our future desired result?
- Updated and modernized operating model

**Establish Foothold**
How can we expand our impact?
- Collaboration model
- Elevated digital presence

**Aggressively Grow**
What do we need to do to have greater impact?
- Diversify fundraising
- Build capacity for organizations we support
- Grow emerging, high-quality organizations
- Digital engagement

**Core**
What do we have to get right all of the time?
- Identify, coordinate, and distribute resources to improve lives