

United Way West Florida Strategic Plan 2026-2029

Goal 1: Drive Innovation and Growth

Goal Description: To proactively cultivate a culture of innovation that anticipates the evolving needs of our community and positions our organization as a forward-thinking leader in the non-profit sector.

Strategic Initiatives

Here are four strategic initiatives designed to achieve this goal. Each includes a description and potential action items.

Initiative 1.1: Establish a Cross-Functional Innovation Committee

- **Description:** To formalize the process of idea generation and implementation by creating a dedicated, diverse committee of staff, board members, and community stakeholders. This group will be responsible for identifying, vetting, and championing new projects and strategic opportunities that align with our mission.
- **Potential Action Items:**
 - Develop a charter for the Innovation Committee outlining its purpose, membership criteria, and decision-making process.
 - Recruit and appoint members from various departments, levels of seniority, and community backgrounds to ensure diverse perspectives.
 - Implement a standardized process for submitting, reviewing, and prioritizing new ideas (e.g., an "Innovation Funnel").
 - Allocate a modest seed budget for piloting promising new initiatives.

Initiative 1.2: Modernize Technology and Digital Infrastructure

- **Description:** To invest in and leverage modern technology to streamline operations, improve data-driven decision-making, and enhance our communication with stakeholders. This initiative focuses on upgrading our digital tools to work smarter, not harder.
- **Potential Action Items:**
 - Conduct a comprehensive audit of our current technology stack to identify gaps and inefficiencies.
 - Enhance or better utilize our Customer Relationship Management (CRM) system to better track donors, volunteers, and program participants.
 - Adopt new volunteer recruitment strategies.
 - Explore data analytics tools to better measure program impact and identify trends.

Initiative 1.3: Amplify Our Voice Through Strategic Communication

- **Description:** To transition from a reactive to a proactive communication strategy that establishes our organization as a thought leader and a primary source of information in our community. This involves telling more compelling stories and engaging our audience across multiple digital platforms.
- **Potential Action Items:**
 - Develop a content strategy that includes regular blog posts, white papers, or impact reports on key issues in our community.
 - Launch a targeted social media campaign to increase engagement and reach a wider audience.
 - Invest in video storytelling to showcase the human impact of our work.
 - Create a monthly e-newsletter that provides valuable content and updates to our subscribers, highlighting results and human-centered stories.

Initiative 1.4: Cultivate Community Leadership and Engagement

- **Description:** To deepen our community roots by creating new platforms for engagement and connection. This initiative focuses on building a more inclusive and participatory community around our mission.
- **Potential Action Items:**
 - Launch a series of public workshops or webinars on topics relevant to our mission, positioning the organization as a community hub for learning.
 - Redeploy targeted affinity groups for key supporter segments with exclusive events and content.
 - Create a formal ambassador program that empowers dedicated volunteers to represent the organization at community events.

Initiative 1.5: Enhance Economic Stability for ALICE Households

- **Description:** To address the needs of Asset Limited, Income Constrained, Employed (ALICE) households in our community. This initiative is dedicated to developing and promoting programs that provide pathways to financial stability and resilience for our hardworking, yet struggling, neighbors.
- **Potential Action Items:**
 - Launch an "ALICE Awareness" campaign, designed to help educate community leaders, policymakers, and employers about the prevalence and struggles of ALICE households locally.
 - Facilitate *ALICE at Work* sessions to help businesses implement policies that enhance workforce success and sustainability. These simulations help educate the workforce about ALICE and may generate a source of income for the workshops.
 - Establish a data-driven grantmaking framework that requires partner agencies to report on ALICE-specific outcomes and adjust funding priorities to favor high-impact programs serving this population.

Goal 2: Communicate Impact

Goal Description: To vividly and consistently articulate the tangible difference our organization makes in the lives of those we serve and the community at large.

Strategic Initiatives

Here are four strategic initiatives designed to achieve this goal. Each includes a description and potential action items.

Initiative 2.1: Develop a Human-Centered Storytelling Program

- **Description:** To systematically collect, craft, and share powerful, authentic stories that illustrate the human side of our work. This initiative will move beyond statistics to create an emotional connection with our audience, helping them understand the "why" behind our mission and the real-world impact of their support.
- **Potential Action Items:**
 - Establish a story collection process and create a central "story bank" to house testimonials, photos, and videos.
 - Provide storytelling training for program staff to help them identify and capture compelling narratives in their daily work.
 - Launch a monthly "Mission Moment" feature on our website, social media, and newsletter, highlighting a different individual's story each month.
 - Create a "Storytelling Kit" for board members and ambassadors to help them consistently share our impact.

Initiative 2.2: Implement an Outcomes-Based Measurement Framework

- **Description:** To fully shift our measurement focus from tracking outputs (e.g., "number of people served," "workshops delivered") to evaluating outcomes (e.g., "percentage of clients who secured stable housing," "increased wages"). This framework will provide a clearer picture of the actual change we are effecting.
- **Potential Action Items:**
 - Define 3-5 Key Performance Indicators (KPIs) for each core program that reflects long-term impact.
 - Develop and implement standardized tools for data collection, such as pre- and post-program surveys, follow-up interviews, and skills assessments.
 - Train staff on the importance of an outcomes-based approach and how to collect data effectively.

Initiative 2.3: Launch a Public-Facing Impact Dashboard

- **Description:** To increase transparency and make our impact easily understandable by creating a dynamic, visual dashboard on our website. This tool will provide real-time (or regularly updated) data on our key metrics, allowing stakeholders to see our progress at a glance.
- **Potential Action Items:**
 - Select and implement a data visualization tool (e.g., Tableau Public, Google Data Studio, or a specialized non-profit dashboard service).
 - Design a user-friendly dashboard that showcases our most important outcome-based KPIs.
 - Integrate the dashboard prominently on our website's homepage or create a dedicated "Our Impact" page.
 - Develop a communication plan to launch and promote the new dashboard to our supporters.
 - Combine quantitative data from the impact dashboard with compelling stories from the storytelling program in our Annual Report.

Goal 3: Create Diverse, Sustainable Income

Goal Description: To build a robust and resilient financial foundation for our organization by strategically diversifying our revenue streams.

Strategic Initiatives

Here are four strategic initiatives designed to achieve this goal.

Initiative 3.1: Launch a Strategic Grant Program

- **Description:** To elevate our grant fundraising from a reactive, project-based approach to a proactive, strategic function of the organization. This initiative will focus on identifying and cultivating relationships with foundations that align with our core mission, with an emphasis on securing larger, multi-year operational grants.

Potential Action Items:

- Develop an annual grants calendar and research pipeline to identify new local, regional, and national funding prospects.
- Create compelling case statements and standardized proposal templates to streamline the application process.
- Enhance our system for tracking grant deadlines, reporting requirements, and relationship touchpoints with foundation program officers.
- Shift focus to seek more unrestricted general operating support in addition to program-specific funding.

Initiative 3.2: Explore a Shared Services Social Enterprise

- **Description:** To leverage our existing expertise and infrastructure to generate unrestricted earned revenue by offering fee-for-service administrative support to smaller, mission-aligned non-profit organizations. This social enterprise will not only create a sustainable income stream but also strengthen the local non-profit ecosystem by building capacity for our peers.
- **Potential Action Items:**
 - Conduct market research with smaller non-profits to determine the most needed services (e.g., bookkeeping, HR support, marketing, grant writing) and viable price points.
 - Develop a business plan outlining the service offerings, financial projections, and marketing strategy.
 - Pilot the program with 2-3 partner organizations to refine the model and gather testimonials.

Initiative 3.3: Expand Community and Event-Based Fundraising

- **Description:** To increase our visibility and generate grassroots support by creating a structured program for partnering with existing local community events. This initiative focuses on making it easy for businesses, community groups, and individuals to support our mission through third-party fundraisers.

Potential Action Items:

- Create a "Fundraising Partner Toolkit" with branding, messaging, and resources for groups wanting to host an event on our behalf.
- Establish formal partnership packages for local sporting events (e.g., "Charity of the Game" at ballgames, team participation in 5k races).
- Launch a peer-to-peer (P2P) fundraising platform that allows supporters to create their own fundraising pages for birthdays, personal challenges, or memorials.
- Develop a corporate sponsorship program for our signature event that offers year-round benefits.

Initiative 3.4: Establish a Major Gifts and Individual Giving Program

- **Description:** To build a pipeline of long-term, committed individual donors capable of making a significant philanthropic impact. This initiative focuses on identifying, cultivating, and stewarding relationships with individuals who have a deep affinity for our mission.
- **Potential Action Items:**
 - Identify the top 25 prospective major donors from our current database.
 - Develop personalized cultivation plans for each prospect, including opportunities for site visits, meetings with leadership, and program engagement.
 - Launch a simple planned giving marketing campaign to encourage supporters to include the organization in their estate plans.
 - Leverage *FreeWill* services to facilitate donors bequeathing us some portion of their will