



United Way
of West Florida

STRATEGIC PLAN

2027

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	Actions
Transformational Investments	We invest \$4.5 million in the community through program services, leveraged dollars, volunteer resources, and community investment.	<ul style="list-style-type: none"> • 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
	Increase the number of Tocqueville donors to 15	<ul style="list-style-type: none"> • Board engagement to foster potential donor relationships
	Achieve 8 total program partnerships/collaborations	<ul style="list-style-type: none"> • 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.

Capacity Building

Goal	Actions
90% of agencies that were unable to achieve certification meet requirements during second attempt	<ul style="list-style-type: none"> • Grow mini grant program for emerging nonprofit organizations, to reflect diversity, equity, and inclusion value • Align certified agency support to emerging nonprofit organization program
Increase community volunteer hours by 25%	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • Expand program staff to include education and health managers • Fully staff UWWF

Connecting

Goal	Actions
75% of all county and municipal governments in our 211 service area contribute funding for 211	<ul style="list-style-type: none"> • Engagement strategy for key stakeholders, includes data based presentation
Increase from 15 hours/7 days to 24 hours/7 days crisis line (211) blended information and referral service	<ul style="list-style-type: none"> • Care coordination strategy • Training and scheduling plans
Increase 211 chat contacts by 25%	<ul style="list-style-type: none"> • Add internet chat function for communication with 211 • Add funding to support inclusion in 211 Counts national platform
Aid 100 households, with 60 achieving increased assets through financial coaching program	<ul style="list-style-type: none"> • Build structure and strategic plan for Financial Stability Coalition • Grow Financial Stability Coalition

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

