

United Way of Northeast Florida
proudly serving



Baker County
Clay County
Duval County
Nassau County
Northern St. Johns County



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LIVE UNITED™ 

**CHANGING LIVES, INSPIRING
COMMUNITIES, ACHIEVING RESULTS**





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LETTER FROM UNITED WAY OF NORTHEAST FLORIDA LEADERSHIP

Dear Friends:

United Way of Northeast Florida is proud to present its 2011-2016 Strategic Plan which is the culmination of a comprehensive engagement process spanning 18 months. During this time we involved hundreds of volunteer leaders, donors, partners and individuals representing our region in thoughtful and meaningful deliberations about our community and our organization. We thank them for their investment of time and for their dedication. The result is a dynamic plan with a powerful vision and strategic priorities that will set the course for our future.

With a rich 87-year history, United Way has earned a reputation as a respected and efficient philanthropic organization. Our long tradition of addressing the human service needs in our five-county region is made possible through the commitment of thousands of volunteers, contributors and community partners.

We actively engage people and organizations from all across the community who bring the passion, expertise and resources needed to get things done. Our mission is to advance the common good by providing leadership, resources and focus to change lives by creating sustainable improvements in education, income and health. We accomplish this through a volunteer-driven Community Impact Agenda.

Together, we've created a comprehensive plan for improving peoples' lives that is focused on specific actions and clear goals. It also lays out concrete steps that will help us strengthen existing relationships and create many new ones. We believe the opportunities identified in this plan demonstrate potential for growth, and promise an even stronger and more effective United Way.

As a valued friend of United Way, we are grateful for the trust you have placed in us. We take that responsibility very seriously. Thank you for your continued commitment and support. We look forward to working together to ensure that our citizens have the building blocks for a good life. We invite you to join us to be part of the change — to **LIVE UNITED**.

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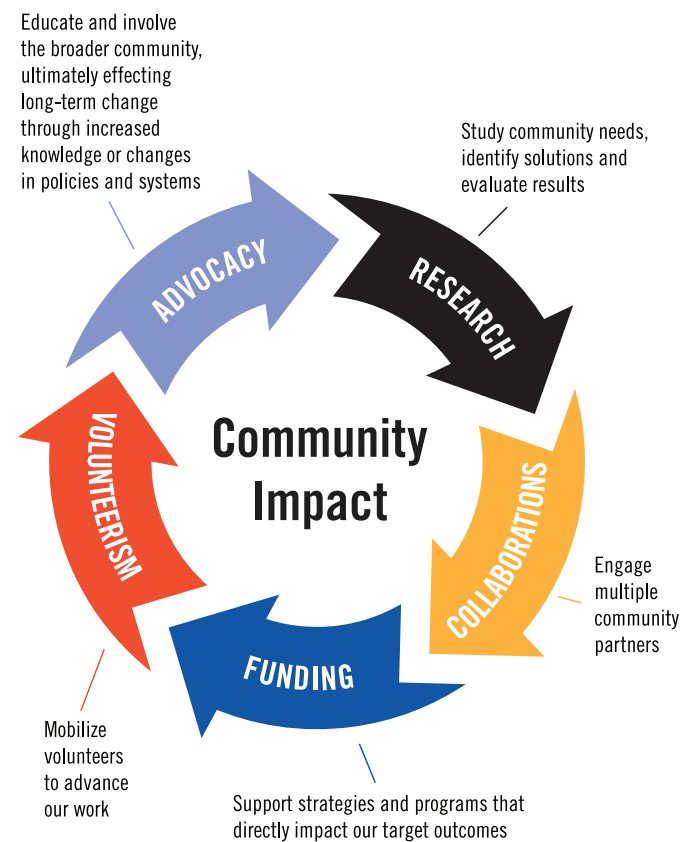
STRATEGIC PLAN EXECUTIVE SUMMARY

United Way of Northeast Florida (UWNEFL) is committed to creating long-lasting social change by addressing the underlying causes of barriers to quality education, financial stability and healthy living. Our vision for the next five years is to create positive, sustainable change by keeping students on track to graduation, helping families achieve financial stability, and providing tools to lead a healthy and engaged life. This vision is the basis of our Community Impact Agenda.

UWNEFL's 2011-2016 Strategic Plan is based on our 2005 transformation into a community impact organization after countless hours of volunteer research and an extensive review of other United Ways' experiences in creating sustainable change. A JCCI Quality of Life report that year indicated that only six of 24 main indicators of the health and well-being of the community were improving, and affirmed this new approach. Because of the increasing complexity of our communities' social issues, UWNEFL has put a "stake in the ground" about identifying the root causes of complex social issues and developing strategies to achieve lasting change.

With this five-year plan, we are uniquely positioned to drive social change that will create opportunities for improving lives. We will build on existing organizational strengths by implementing strategies to achieve measurable progress over time in education, income and health.

Achieving our Community Impact Agenda will require a variety of tactics including research, building collaborative community partnerships, funding, volunteerism and advocacy. This process is illustrated through the community impact graphic depicting the continuous evolution of our work.



STRATEGIC IMPERATIVES TO DRIVE COMMUNITY IMPACT AGENDA

Lead Sustainable Improvements in Education, Income and Health:

We recognize that we cannot achieve community-level results by spreading resources "a mile wide and an inch deep." UWNEFL volunteers and leadership took a decisive step in this plan, defining our organization's success through our ability to impact issues in our community at a systemic level. Over the next 12-18 months, UWNEFL will establish community-level goals in education, income and health. We will accomplish these goals through a research-based, focused approach in collaboration with partners such as regional public school systems, Early Learning Coalitions, the Jacksonville Children's Commission, The Community Foundation in Jacksonville, The duPont Fund, local governments, health systems, agency partners and many others.

Mobilize and Engage Resources, Donors, Volunteers and

Neighborhoods: The key to success will hinge on our ability to mobilize others to embrace our Community Impact Agenda. We have established an aggressive goal to grow revenue to \$30 million by 2016 and more than double the number of volunteers engaged in our community impact work. The Community Impact Fund, formerly known as the Community Fund, will be the public giving vehicle by which we develop increasing resources under management to implement our agenda. Diversifying funding sources through increasing non-traditional and grant revenues will also be important elements of our strategy.

Excel in Relationship Management: Building a constituent-centric organization is essential to United Way's work to improve lives and strengthen communities. Developing year-round relationships with individual donors, both in the workplace and the community, is the foundation of our relationship management efforts to enhance engagement with givers, advocates and volunteers. Through increased understanding of our constituents' needs and aspirations, UWNEFL will be able to more effectively mobilize and sustain the necessary financial and volunteer resources to achieve community goals. Nurturing these relationships with all of United Way's constituents allows us to thank them, recognize their partnership and communicate the impact of their investments of time or financial support.

Build Community Awareness and Understanding: To deepen levels of engagement with donors, volunteers, partners and individuals in the community, we will actively communicate our results. Expanding the use of new media channels to communicate with constituents will allow us to reach a wider audience and increase public understanding of UWNEFL's impact in the community. In addition, our marketing and communication strategies will strengthen volunteers' understanding of United Way through stronger orientation and training.

Align Internal Resources with Strategic Goals: The organization's commitment is to continue operating with the highest level of integrity and accountability as a trusted partner and responsible financial steward. UWNEFL will ensure that gifts entrusted to our Community Impact Fund are invested with purpose, integrity and accountability. We will consistently evaluate and optimize staffing structure, capacity and composition to align with the organization's strategic direction. And, UWNEFL will embrace the tools and technology necessary to increase productivity and efficiency in our implementation of the plan.



This strategic plan is a flexible, living document that sets our direction for the next five years. UWNEFL is committed to excellence and accountability for results that make measurable, lasting change. The following pages detail how we will grow our capacity to create this change through bold, but achievable goals.

MISSION, VISION AND VALUES

MISSION: United Way provides leadership, resources and focus to change lives in our community by creating sustainable improvements in education, income and health.

VISION: United Way of Northeast Florida is a leader in ensuring:

- Children enter kindergarten ready to succeed and students stay in school through graduation
- Individuals and families have the opportunity to achieve financial stability
- People have the opportunity to lead healthy and engaged lives

VALUES: In pursuing our mission, the following principles guide our relationships with stakeholders including donors, volunteers, partners, employees and the communities we serve.

Excellence: We engage the community with professionalism and quality support.

Compassion: We believe in the dignity and worth of every individual and place our highest priority on serving local people in need.

Collaboration: We involve and unite the local community knowing that respect, diversity and inclusiveness make us stronger.

Innovation: We seek fact-driven, creative and sustainable solutions to our community's most pressing social problems.

Integrity and Fairness: We resolve to maintain the highest standards of personal and organizational honesty in all our activities.

Accountability: We are proactive and responsive to our stakeholders through consistent communication, the delivery of relevant and high-quality services, and the effective measurement of all programs and initiatives.

Effectiveness: We continuously review our results and commit to using our resources and expertise in the most efficient and innovative manner.



STRATEGIC IMPERATIVES TO DRIVE COMMUNITY IMPACT AGENDA

- Lead Sustainable Improvements in Education, Income and Health
- Mobilize and Engage Resources, Donors, Volunteers and Neighborhoods
- Excel in Relationship Management
- Build Community Awareness and Understanding
- Align Internal Resources with Strategic Goals

STRATEGIES

Convene concerned community leaders and subject matter experts to develop plans for improving income and health by March 2012

Expand our work in education by annually scaling up Achievers For Life and Success By 6 to meet identified student needs by 2016

Grow and formalize advocacy efforts to further our goals in education, income and health

GOALS

Establish bold, quantifiable, community-wide goals in education, income and health by April 2012

Implement detailed strategies to advance our income and health impact agenda by December 2012

Leverage our successes in Pre-K-12 education by increasing the number of at-risk students and preschoolers receiving targeted support by 41% from 9,257 to 13,094 by 2016

ACTIVITIES

Convene experts, including agency leaders, and assess current efforts by reviewing historical data trends in Northeast Florida's education, income and health programs

Involve partner agencies in the establishment of community goals

Review research of national and local best practices that improve education, income and health

Invite experienced community organizations to compete for funding to implement our strategies in education, income and health

Partner with Early Learning Coalitions and Duval County Public Schools to develop expansion plans for current education work

Participate in United Way Worldwide's Public Policy Institute to develop our advocacy strategy beginning with education

Evaluate UWNEFL-funded programs to ensure they continue to achieve measurable, positive outcomes

Report results to the community every year

LEAD SUSTAINABLE IMPROVEMENTS IN EDUCATION, INCOME AND HEALTH



STRATEGIES

Grow the number of workplace donors and dollars that support our Community Impact Agenda for education, income and health

Develop plans for allocating increased resources to our Community Impact Agenda

Diversify funding sources beyond the workplace campaign

Develop a comprehensive volunteer engagement model that enhances our volunteers' experience with us

Cultivate deeper relationships with our volunteers through recruitment, relevant training and annual recognition

GOALS

UWNEFL will grow annual revenue to \$30 million by 2016

Increase leadership giving 25% from \$3,860,000 to \$4,860,000 by 2016

Increase Tocqueville giving to 335 members, raising \$5,608,555 by 2016

Increase Atlantic Circle giving to 900 members, raising \$974,685 by 2016

Increase Women in Local Leadership (WILL) giving to 860 members, raising \$2,042,449 by 2016

Increase corporate gifts 17% resulting in \$612,749 new by 2016

Grow grant revenue 66% from 2010 baseline by 2016

Grow endowment from \$1,250,000 to \$2,500,000 by 2016

Grow the number of volunteers serving with UWNEFL by 100% from 11,500 in 2010 to 23,000 by 2016

Grow the number of annual volunteer hours by 100% from 92,000 in 2010 to 184,000 by 2016

ACTIVITIES

Continue and expand efforts to recruit new donors and win back lapsed donors

Build a year-round contact plan to ask, thank, inform and engage our constituents

Cultivate new and small business support

Develop a plan to grow gifts of \$100,000 or more from individual donors

Create a campaign leadership council to share best practices, assist with campaign and advocate for UWNEFL

Establish a comprehensive corporate communications plan to provide updates on community impact progress

Coordinate year-round volunteer opportunities to address education, income and health

Develop annual, uniform measurement tools to audit and gauge volunteers' experience for program improvement

Develop leadership training for staff and volunteers for community advocacy to support our impact agenda

MOBILIZE AND ENGAGE RESOURCES, DONORS, VOLUNTEERS AND NEIGHBORHOODS

STRATEGIES

Embed into all UWNEFL activities the priority of relationship management

Develop year-round relationships with individual donors, both in the workplace and the community

Directly thank and recognize all constituents and communicate the impact of their partnership, investment of time and/or financial support

GOALS

Deepen constituent relationships to increase support of United Way's Community Impact Fund from 73% to 80% by 2016

Increase donor retention by 7% by 2016

Develop volunteer and staff training in relationship management by 2012

ACTIVITIES

Integrate core relationship management practices into all operations

Use available data to improve donor retention

Partner with corporations to better understand our donors and volunteers

Segment and develop relationship management strategies for each constituent group

Analyze data to understand what matters most to our constituents

EXCEL IN RELATIONSHIP MANAGEMENT



STRATEGIES

Create an annual, targeted communications plan designed to achieve awareness and understanding based on goals established for each high-priority constituent segment

Strengthen United Way's position as a community impact leader and convener achieving results in education, income and health through targeted communication and advocacy

Inform and engage constituents through year-round, targeted, relevant messaging

Develop finely tuned market perception tools to guide development of marketing and communications messaging and strategies

GOALS

Increase understanding of our community impact work with key volunteer leadership by 10% and volunteer constituents by 25% by 2016 as measured from 2010 survey

Maintain a favorability rating at or above the United Way national average

Evaluate effectiveness of marketing, communications and advertising to support UWNEFL's community events, and other outreach efforts against each project's specific goals

Establish a local annual, segmented constituent survey and message testing process as a basis for goals to drive incremental improvement in awareness and understanding of our Community Impact Agenda

ACTIVITIES

Clearly and consistently tell the UWNEFL story

Create systematic contact mechanisms to ask, thank and inform constituents

Report United Way community impact results to existing corporate partners and community leaders to strengthen their support and engage them in recruitment

Create research-driven, targeted messages to motivate constituents to give, advocate and volunteer

Determine and utilize constituents' preferred communication channels and frequencies

Develop communication plan to grow corporate dollars in alignment with education, income and health

Utilize social media effectively

BUILD COMMUNITY AWARENESS AND UNDERSTANDING

STRATEGIES

Maintain UWNEFL's sound governance, legal compliance and effective internal controls corporate oversight

Annually evaluate, align and manage internal resources in support of strategic goals while maintaining efficient and accountable operations

Implement a modified resource management process for allocating funds

GOALS

Institutionalize methodology for periodic review and update of key policies and procedures by 2012

Maintain industry-competitive overhead ratio

Establish employee satisfaction survey methodology and appropriate goals by 2012

Convene a task force of volunteers and agency leaders to review and revise resource management process by 2012

ACTIVITIES

Standardize formal mission-based orientations for all committee volunteers

Align annual operating expenditures with strategic goals

Research and implement technological solutions that support strategic goals

Evaluate and optimize staff skills, structure, capacity and composition

Incorporate relationship management best practices into job descriptions, staff skill sets and performance evaluations

ALIGN INTERNAL RESOURCES WITH STRATEGIC GOALS



LEAD SUSTAINABLE IMPROVEMENTS IN EDUCATION, INCOME AND HEALTH

United Way has identified three community priorities that frame the building blocks of a good life: education, income and health.

United Way is focused on identifying the root causes of the challenges facing Northeast Florida. Our Community Impact Agenda is focused: lead sustainable improvements in education, income and health to improve peoples' lives and strengthen our communities. These sustainable improvements are based on research and incorporate a variety of tactics, including targeted program funding, measuring results, building collaborative community partnerships, mobilizing volunteers, advocacy, community awareness and social marketing.

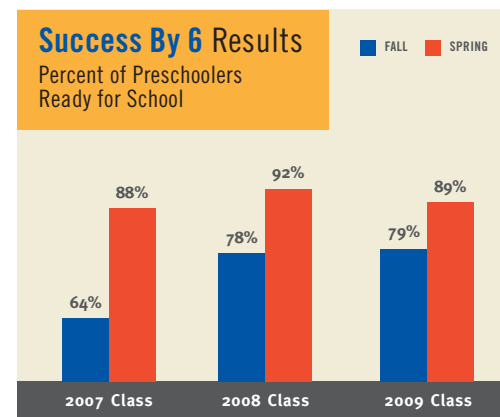
Our history and standing as a results-driven community organization gives us great confidence for the future. In the next five years, we will implement community impact strategies and champion their potential to create measurable, positive change in income and health in Northeast Florida.

EDUCATION

A productive and fulfilled life begins with a good education. United Way is committed to improving education outcomes in our communities. Thirty percent of Duval County kindergarteners were not ready to learn how to read in the fall of 2009. That same year, 27 percent of third-graders and 60 percent of tenth-graders in Northeast Florida were reading below grade level. Our Northeast Florida community has an average high school graduation rate of 74 percent. Although this rate is improving county by county, too many of our students are not prepared for a productive future.

UWNEFL's work in education has been multi-faceted and highly effective. Since 2007, our **Success By 6** partnership has connected hundreds of Northeast Florida children to high-quality child care centers. The readiness levels of these preschoolers significantly increased every year as evidenced by the chart above. In partnership with Duval County Public Schools (DCPS), we developed a middle school transition strategy, **Achievers For Life (AFL)**, to help struggling sixth-grade students at risk of dropping out succeed academically and socially. AFL students have experienced, on average, a 12 percent improvement in GPA, a four percent increase in promotion rates—outpacing promotion rates for all sixth-graders in the DCPS—and a 13 percent improvement in attendance since 2008.

We have also led the **Full Service Schools'** partnership with the Jacksonville Children's Commission, DCPS and the Duval County Health Department since 1992. This collaborative partnership serves eight targeted Duval County neighborhoods and has helped to reduce behavior referrals by 50 percent for students served. We must continue to focus on and expand this critical work to increase our students' success.



INCOME

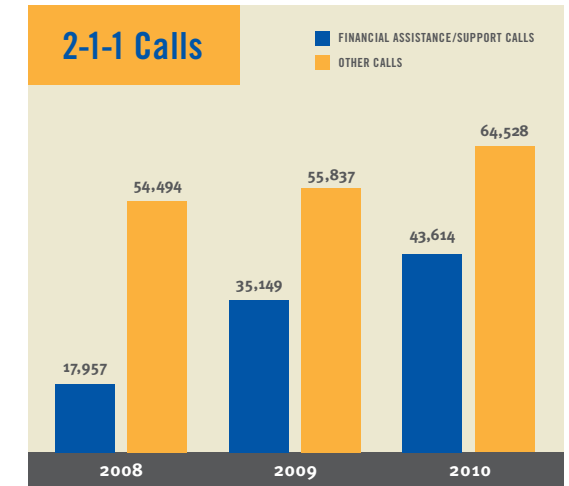
Financial stability is another essential building block for a good life. For the last eight years, UWNEFL has been helping individuals and families achieve financial stability and self-sufficiency through our **RealSense Prosperity Partnership**. We provide free tax preparation, money management training, and partnerships to access matched savings accounts that can be used to start a business or further an education. Through our **2-1-1 emergency referral call center**, we have connected tens of thousands of area residents to critical financial and job-support programs and services.

Yet, there is so much more to be done. In Northeast Florida, 13 percent of all residents live in poverty (annual incomes of less than \$22,350 for a family of four), and 36 percent of families and individuals are lower-income (annual incomes of less than \$56,000 for a family of four). Another troubling statistic, 50 percent of Florida's low-income families are spending 40 percent or more of their income on housing costs. This level of housing expense exceeds federal standards indicating that families are at financial risk. More than 3,900 people were homeless in Northeast Florida in 2010 (Duval, Clay and Nassau counties), which equates to 435 homeless people per 100,000 residents. The rate of homelessness has increased 49 percent since 2007.

HEALTH

The research shows that health is strongly linked to education and income. Good health allows children to learn better, and adults to increase their income through productive work. According to the Centers for Disease Control, just over one-third of youth in grades nine through 12 and one-third of adults are considered healthy, with the percentage stagnating for youth and worsening for adults when compared to a decade ago. Key markers contribute to a healthy progression through life: a normal birth weight, preventive health care beginning in infancy, staying healthy and avoiding risky behaviors as a youth and adult.

The growing population of citizens 65 and older prompted UWNEFL in 2003 to focus on the health and independence of older adults. Research with seniors and health system leaders led United Way to connect hospitals with home care systems to better support seniors as they leave the hospital to continue their recoveries at home. Based on the growing health needs across the generations in Northeast Florida, it is time to thoughtfully and collaboratively build on our success and expand our reach. As we develop our strategy, UWNEFL will utilize existing knowledge and research, specifically from area health system leaders.



**CHANGING LIVES, INSPIRING COMMUNITIES,
ACHIEVING RESULTS**

Working together, we can accomplish what no one organization, individual or government agency can alone. United Way will convene a working group of citizens, community leaders and subject matter experts to examine research and community assets, and determine sustainable long-range, community-level goals in education, income and health. This group will guide the implementation of key strategies in 2013 to address the goals for income and health.

In addition, we will work with our partners to improve student outcomes by scaling AFL and Success By 6 to meet the needs of at-risk students by 2016. This provides the opportunity to increase our support of targeted student interventions resulting in 41 percent more of our community's children receiving help to stay on track to graduation.

We will align United Way's funded programs with measures that our research indicates are critical to our communities' success today and tomorrow. With impact partners, we will ensure accountability by tracking and measuring outcomes and consistently reporting our learnings and results.

Now, more than ever, our leadership matters. It will take staff, volunteers and donors to gather the necessary resources to achieve our goals. These resources will allow us to align our efforts with those of our corporate and impact partners to focus on improving education, financial stability and health outcomes. In addition, we will educate the community about our work and encourage donors and volunteers to become advocates.

We will inspire people to become champions for our community. People may choose to get involved by soliciting their friends to volunteer, contacting their elected officials, attending public meetings, organizing events or undertaking many other actions locally and nationally. The result of these actions will be a more targeted use of resources, volunteer support, system improvements and policy changes.



MOBILIZE AND ENGAGE RESOURCES, DONORS, VOLUNTEERS AND NEIGHBORHOODS

Donors, volunteers and neighbors are the heart of our mission to improve school readiness and graduation rates; help families become financially stable; and educate our community about healthy behaviors and prevention.

UWNEFL will utilize innovative approaches for recruiting, retention and deepening relationships with donors and volunteers in workplace campaigns and reaching beyond the workplace. We will deepen relationships with all of United Way's supporters by focusing on relationship management and retention strategies, connecting with them about the importance of support for the Community Impact Fund.

Improving school readiness and graduation rates, helping families become financially stable, and educating our community about healthy behaviors and prevention increases the resources necessary to support our neighborhoods. UWNEFL has set a goal to grow our annual revenue base \$5 million to \$30 million dollars by 2016 to better meet these important community needs. Volunteers are essential resources in achieving these community impact goals and United Way will call for more than 23,000 volunteers, or 11,500 more volunteers annually than in 2010. To meet these goals, UWNEFL will build a specific plan to recruit new donors and volunteers, retain existing donors and volunteers, and deepen these relationships.

Thousands of donors and volunteers offer their generous support each year and these resources are needed now more than ever. Without these gifts of time, talent and treasure, United Way's capacity to strengthen communities and improve lives would be limited. Our community focus on education, income and health offers an unparalleled opportunity to strengthen our Northeast Florida community.

UWNEFL has a long history of substantial community and financial support with campaign growth averaging four percent annually over the last decade, or \$7 million dollars (1999 - 2009). The Great Recession challenged our economy beginning with the 2008 campaign, producing losses of \$1.8 million over the 2008 and 2009 campaign years.

Of equal concern is a donor base that has declined by 13.5 percent since 2006. The trend of increased giving from fewer donors puts implementation of our community impact work at risk, as giving to United Way's Community Impact Fund also fell in 2009 for the first time in three years. Our revenue decline would have been greater had it not been for the increase in the average gift from \$279 dollars in 2006 to \$306 dollars in 2010.

The 2010/2011 campaign was our turnaround campaign, resulting in a three percent increase. On the volunteer front, in 2010 alone, more than 11,000 passionate and dedicated volunteers served all across our organization and in the community. Through our corporate engagement efforts, we have seen a 136 percent increase in United Way volunteer activities planned and coordinated for hundreds of workplace teams.



Atlantic Circle and **Women in Local Leadership**, our affinity groups, have experienced steady growth over the last five years in both members and total dollars raised. These groups have been excellent opportunities for United Way to engage donors in our work. In 2010/2011, these two groups represented 29 percent of the total leadership giving. United Way will continue to build on these strengths by identifying, educating and strengthening young professionals for community leadership, as well as engaging women leaders through volunteering, networking and financial support.

The Tocqueville Society continues to be strong, increasing total dollars raised by five percent from 2006 to 2009 and representing 32 percent of our total 2009 revenue. In 2010/2011, Tocqueville giving was up nine percent from 2009. Key to this growth was the generous Weaver Challenge, made possible by Wayne and Delores Barr Weaver. Building on the generosity and commitment of the Weaver, Stein, Munoz and Ward families, United Way will also invite individuals and couples to make transformational gifts of \$100,000 or more targeted to impact projects.

A growing endowment will ensure UWNEFL can respond to both present and future needs to achieve lasting community impact beyond what an annual campaign can accomplish. We are fortunate to have strong support from more than 2,000 donors who have given to United Way for more than 10 years. We will ensure that these loyal donors feel increasingly connected to our mission and invite them to support our endowment by making a legacy gift.

We will take a multi-pronged approach to diversifying revenue sources beyond the current workplace. Areas of opportunity include cultivating new campaigns, growing small business participation, targeting growth industries, increasing grant revenue, building greater participation in legacy giving and expanding corporate gifts specific to United Way's Community Impact Fund.

We will also increase our reach to retirees and those who work at home or are not connected to a workplace campaign.

Volunteers will be needed on multiple fronts in the next five years to address the Community Impact Agenda. We need their help assisting families in becoming financially stable; serving as advocates in the workplace for United Way and our impact goals; helping conduct community research; mentoring middle-school students; educating senior citizens about chronic disease prevention; asking prospective donors for support; teaching parenting skills to new moms and dads; providing leadership on our boards; leading our affinity groups; and much, much more.

Mobilizing for this work begins in the communication of our volunteer needs. We will promote year-round volunteer opportunities through the workplace campaign and throughout the community. Whether a veteran United Way volunteer or a first-time donor, we will be ready to engage those who express interest in serving. As we better understand the interests and skills of volunteers, we will support them with strong orientation and training.

New systems and infrastructure will allow us to deepen these relationships with volunteers through annual recognition of their contributions. We will develop a uniform measurement tool to enable us to listen and respond to volunteer feedback.

Moving forward with a growing base of committed volunteers and donors, we will celebrate those who raise their hands and give of themselves to advance United Way's Community Impact Agenda for positive, sustainable community change.

EXCEL IN RELATIONSHIP MANAGEMENT

Excellence in relationship management is a constituent-centered philosophy that inspires loyalty and prioritizes building strong, long-term and year-round relationships with donors, volunteers and partners to advance our mission.

The most important relationship we have is with our constituents. We will continue to build on the foundation of our relationship management efforts to enhance engagement of givers, advocates and volunteers. We recognize that deepening relationships with all of United Way's constituents is fundamental to the long-term success of our mission.

Relationship management allows us to better understand constituents' aspirations for the time they spend with us today, other interests they may have in our community impact work and their motivations for financial support. It will also guide UWNEFL in understanding how to communicate with constituents on a year-round basis to enhance connectivity and foster greater loyalty. This understanding will enable us to more effectively mobilize and sustain the necessary financial and volunteer resources to achieve established community goals.

There are two key measures of relationship management that are essential to long-term success in motivating constituents to give, advocate and volunteer. First, we will increase donor retention by seven percent by 2016. Second, we will deepen constituent relationships to increase support of United Way's Community Impact Fund from 73 percent to 80 percent by 2016 to provide the resources needed for lasting social change through the work outlined in the Community Impact Agenda.

United Way's organizational culture must increasingly celebrate the value of strong relationships. Moving forward, every member of the staff will have specific relationship management goals added to their performance evaluations and job descriptions.

We have adopted the expectation throughout UWNEFL that all of us — in every interaction with our constituents — are relationship managers. Our evolution along this path is encouraging, as a recent internal survey revealed that 79 percent of United Way staff understood how relationship management applied to their specific job responsibilities.

Excellence in relationship management makes it critical to build efficient, intuitive processes for connecting relevant constituent data and insights across the organization. We will engage our corporate partners to gather the information needed to understand what is important to our donors and volunteers, and communicate more effectively based on constituents' interests.

Building a constituent-centric organization is essential to United Way's work to improve lives and strengthen communities. Every contact with constituents is another step along the journey toward excellence in building loyalty and ensuring that donors, volunteers and partners are at the heart of everything we do.



BUILD COMMUNITY AWARENESS AND UNDERSTANDING

Build awareness and understanding of United Way's Community Impact Agenda, partnerships and results to drive sustainable positive change in Northeast Florida.

UWNEFL's key attributes of respondent awareness, giving and trust were above the national average based on a national public opinion poll conducted for all United Ways. Perception was also strong that our local United Way is effective in advancing the common good, and should be a leader in solving community problems.

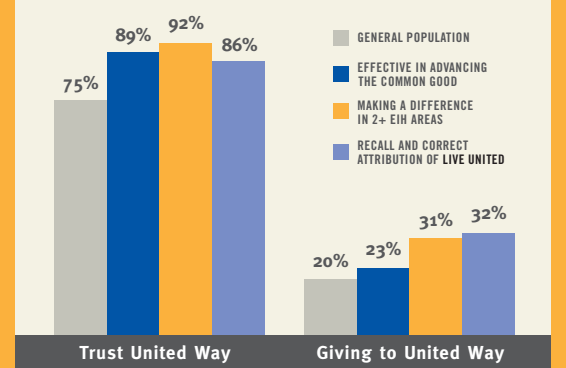
While we are proud of these results, we know that not all constituents fully understand United Way's Community Impact Agenda. We are committed to leveraging our strong brand and improving communications to enhance UWNEFL's position as a leader in positive community change. Research shows a need to simplify the message to make UWNEFL's work more understandable.

Clearly and consistently telling the compelling stories of our mission to improve education, income and health is integral to understanding the added value of community impact. These are the stories of United Way's work with community impact partners, donors, volunteers and recipients. They are the human faces of what the Community Impact Agenda is all about — accomplishments that drive lasting, positive change in Northeast Florida.

UWNEFL's 2011-2016 Strategic Plan is ambitious. We will support community goals by building constituent awareness and understanding about how United Way brings people and organizations together with the passion, expertise and resources to lead sustainable change. This will be accomplished by developing and implementing a compelling, year-round marketing and communications strategy that invites community members to join in and share the results.



The Strategies Work: *LIVE UNITED*, Advancing the Common Good and Education, Income & Health Drive Gains In Attitudes and Giving



There are more ways to communicate today than at any time in history. We will explore how constituents want to receive information and expand UWNEFL's use of social media to enhance their relationship with us. We will engage and invite our constituents to give, advocate and volunteer to support the Community Impact Agenda.

Marketing and communications strategies will strengthen key leadership volunteers' engagement with us, and increase their understanding of United Way's work 10 percent by 2016. We will also focus resources on increasing understanding of constituents across the communities we serve. This will enable us to better utilize the most efficient, effective tools to reach audiences with our story, and build on United Way's solid reputation as a community leader committed to addressing the pressing issues of education, income and health.

The combined implementation of these marketing strategies will support UWNEFL's strategic plan to increase annual revenue to \$30 million by 2016. We invite the community to join us and be part of the change they want to see.

ALIGN INTERNAL RESOURCES WITH STRATEGIC GOALS

Align internal resources and operations to support strategic imperatives, maintain reputation for accountability and efficiency, and support the implementation of the Community Impact Agenda.

UWNEFL enjoys a strong reputation in the community for integrity, fiscal accountability and professionalism. We are an organization with deep roots, led by knowledgeable and dedicated volunteers and professional staff. This five-year strategic plan process provides the roadmap for continued effectiveness with clear direction and measurable goals in the key areas of education, income and health.

Staff and volunteers are committed to maintaining sound governance practices and strong fiscal management to support United Way's leadership role in achieving community impact by aligning internal resources and operations. New financial investments will be made where appropriate to support our leadership, volunteers and employees in achieving the bold goals of this plan. Through Trustee direction, expenditures will be aligned in the annual budget to support strategic goals, including evaluation of new technology options to improve operations and enhance constituent relationships.



Community impact is grounded in building strong relationships and trust. UWNEFL is supporting staff in expanding their knowledge of relationship management and providing the tools, training and technology to increase productivity and efficiency. This focus on internal efficiencies allows us to continue to maintain a competitive overhead percentage relative to other not-for-profits in our community and nationwide.

We will consistently evaluate and optimize staffing structure, capacity and composition to align with the organization's strategic direction. We will develop an annual survey to measure employee satisfaction, and identify opportunities to increase fulfillment and efficiency. Clear goals will be established annually for staff, and ongoing training will increase the efficiency with which we use our primary constituent database.

UWNEFL will ensure that our staff and volunteers reflect the diversity of the communities we serve to effectively engage all Northeast Florida constituents.

Our board and volunteer surveys indicated varying levels of understanding about UWNEFL's core mission. UWNEFL will implement a standard orientation for all volunteers to enhance their understanding and satisfaction with the volunteer experience. We will report regularly to volunteers on the increase or decrease in United Way's Community Impact Fund that supports the Community Impact Agenda and the projected effect on programs and initiatives.

United Way will continue to apply consistent, effective internal controls and strong corporate governance to ensure accountability and transparency to constituents. Our strong stewardship includes monitoring, updating and adhering to best practices in nonprofit policies and procedures, and ongoing proactive fiscal management to ensure actual expenditures are within budget. The focus on internal infrastructure and operations will pay big dividends in achieving the goals set out in this plan.

While this document sets our direction for the next five years, we will monitor progress and results annually, making the necessary adjustments to remain on track to meet our strategic community goals. United Way of Northeast Florida is committed to excellence and insistence on accountability for results that make measurable, lasting change.

Community impact is grounded in building strong relationships and trust.



CLOSING THOUGHTS

At the core of United Way of Northeast Florida's 2011-2016 Strategic Plan is the Community Impact Agenda. This approach demands that our five-county region be both proactive and responsive to the education, income and health needs of the region.

The community impact business model is strategic, driven by evaluation and creates a seamless continuum that drives and informs our work. It is a model that leads deep and lasting change by addressing the three components that are the foundation of successful lives and thriving communities: education, income and health.

The end result is a strategy that moves us closer to our vision that all of our neighbors will have access to the building blocks of a good life—a quality education that leads to a stable job with a livable wage, enough income to support a family through retirement, and the tools to live a healthy and engaged life.

We will build awareness and understanding of community needs and accomplishments to inform and rally the citizens of Northeast Florida around this shared sense of purpose. This strategic plan is our roadmap. It defines our Community Impact Agenda, and it establishes new expectations for performance, professionalism and achievement.

**Working together,
we can have lasting,
positive, sustainable
impact that improves
lives and strengthens
the future of
our entire region.**

We are fortunate to live in communities that embrace the responsibility to care for all of our neighbors. In 2010, individuals, businesses and organizations generously stepped up to address the growing needs in Northeast Florida. While the recession appears to be easing and there are positive signs in our economy, unemployment remains well above the national average. Citizens, who just a few short years ago could not have imagined themselves without jobs and needing help, are calling our 2-1-1 emergency referral service in record numbers.

Responding to increasing needs and achieving our goals for education, income and health make financial support for United Way's Community Impact Fund more critical than ever. We invite everyone in Northeast Florida to support the important work described within these pages with their gifts to the Community Impact Fund. United Way is committed to ensuring that gifts entrusted to the Community Impact Fund are invested with purpose, integrity and accountability. Community volunteers, working with professional UWNEFL staff, provide oversight to ensure that investments generate measurable and sustainable results.

We believe that we have the plan in place that clearly states our vision, mission and strategic imperatives to achieve the bold goals laid out in this document. Working together, we can have lasting, positive, sustainable impact that improves lives and strengthens the future of our entire region.

Whether you give, advocate or volunteer to improve lives in our community, we thank you for your support.

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