



STRATEGIC PLAN 2023-2026

To be a united foundation that guides and transforms communities



**COMMUNITY
FOUNDATION**
A DIVISION OF UNITED WAY OF VOLUSIA AND FLAGLER COUNTIES

**United
Way**



Volusia-Flagler Counties

Executive Summary

Originally formed in 1941 as the Daytona Beach Community Fund, the United Way in Volusia and Flagler counties served the local community as separate entities. In 1996, after years' operating independent of one another they merged to form the United Way of Volusia-Flagler Counties (UWVFC).

In 1986, the Community Foundation (CF) began as an endowment fund within the United Way of Volusia-Flagler Counties. In 2009, after years of service, the CF completed a branding campaign, subsequently changing its name to the Community Foundation of Volusia & Flagler. In 2017 UWVFC transitioned to a Community Impact model to better serve the local community and invest in long-term, measurable change. In 2023 the CF and UWVF consolidated its volunteer leadership and the organization began branding as the Community Foundation and United Way of Volusia and Flagler-Counties.

This Strategic Plan is comprised of four distinct strategic priorities: Philanthropy, Impact, Communication and Organizational Excellence. Thirty-five distinct strategies will ensure continuous engagement and growth. Progress will be recognized through the implementation of accountability partners and timelines. This is a fluid process accommodating adjustments in workflow, as needed.

Vision

To be a united foundation that guides and transforms communities.

Mission

To strengthen the organized capacity of our community, ensuring maximum support to everyone in need.

Core Values

Purpose: We exist to actively connect our communities to serve our neighbors.

Innovation: We celebrate creative ideas and strive to identify unrealized opportunities.

Collaboration: We strengthen relationships for greater resources, recognition, and success.

Service: We embody a mindset that ignites our desire to add value to our communities.

United Way of Volusia-Flagler Counties Team

Strategic Planning Committee

Ann Boughtin

Maritza Rodriguez

Amanda Lasecki

Dr. Audrey Butler

Emily Smith

Courtney Edgcomb

Randolyn Haley

Dr. Sherryl Weems

Board of Directors – Executive Committee

Dustin Smurdon - Chair

Nicole Miller – Chair Elect

Robin King - Treasurer

Ryan Page - Administration Chair

Dr. Sherryl Weems – Resource Development Chair

Greg Sullivan – Community Foundation Chair

Courtney Edgcomb – President and Secretary

Board of Directors – At Large Members

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Brooks Casey

Kathleen Dulko

Dr. Roosevelt Harris

Jane Katona

Jan Miller

Brittani Preschel

Preston Root

Brandon Young

Abha Bhandair

Michael Chiumento

Randy Dye

Karen Jacobs

Kim McBee

Greg Motto

Nikki Risley

Bobby Thigpen

Dr. Audrey Butler

Dr. Donald Doudna

Zayna Gibson

Bev Johnson

Kate Meyering

David Petracca

Maritza Rodriguez

Michelle Walker

STRATEGIC PRIORITIES



STRATEGIC PRIORITY 1: PHILANTHROPY

Key themes > Growth ~ Investment ~ Leadership

Goals	Champion(s)	Timeline
1. Grow organizational assets.		
1.1.1 Create a fund development plan, incorporating opportunities of both the UWVF and CF.		
1.1.2 Launch an EDGE Campaign by 2025.		
1.1.3 Research diversified income opportunities (exp. special events, direct mail, social media, etc.).		
2. Drive philanthropic growth.		
1.2.1 Grow annual sustainable revenue (exp. fund administration fees, endowment funds, Tocqueville, etc.)		
1.2.2 Achieve 100% Board of Directors giving annually.		
1.2.3 Increase nonprofit sustainability through endowments.		
1.2.4 Increase planned giving pipeline.		
3. Become recognized as philanthropic thought leaders.		
1.3.1 Collaborate with local organizations to lead philanthropic conversations with professional advisors, nonprofits, and donors.		

STRATEGIC PRIORITY 2: IMPACT

Key themes > Care ~ Focus ~ Partnerships

Goals	Champion(s)	Timeline
1. Strengthen the effectiveness and future sustainability of Volusia and Flagler County nonprofits.		
2.1.1 Educate nonprofit leaders and boards on available UWVFC and CF resources.		
2.1.2 Create a pathway for shared knowledge and collaborative opportunities.		
2. Invest in organizations and programs that impact individuals and families in need.		
2.2.1 Use data to inform community needs and strategies.		
2.2.2 Coordinate financial resources to the community.		
2.2.3 Communicate the organization's return on investment.		

STRATEGIC PRIORITY 3: COMMUNICATION

Key themes > Engagement ~ Storyteller ~ Imagination

Goals	Champion(s)	Timeline
1. Develop a multi-year marketing and communications strategy.		
3.1.1 Convene a team of staff, external stakeholders, and board members. Consider the engagement of a communications consultant.		
3.1.2 Survey a variety of external constituents, with an eye toward aligning marketing to community demographics.		
3.1.3 Define annual communication efforts in Flagler and Volusia Counties.		
2. Drive intentional storytelling.		
3.2.1 Develop clear and consistent messaging of the partnership between the CF and UWVFC		
3.2.2 Educate board, volunteers and staff to be ambassadors.		
3.2.3 Develop plan to amplify the needs of people in our community who live paycheck to paycheck (exp. A.L.I.C.E.).		
3.2.4 Publish and/or present on nonprofit thought-leadership topics.		
3. Expand knowledge and value of participation in community leadership.		
3.3.1 Communicate participation and leadership in relevant initiatives (local, state, or national boards, economic development, capacity building, etc.)		
3.3.2 Develop and implement communication plan for elected officials and governmental leaders.		

STRATEGIC PRIORITY 4: ORGANIZATIONAL EXCELLENCE

Key themes > Evaluation ~ Teambuilding ~ Impact

Goals	Champion(s)	Timeline
1. Create an organizational culture that drives employee growth and development.		
4.1.1 Evaluate compensation, recruitment, and retention. Adjust, as necessary.		
4.1.2 Prioritize professional development plans for staff.		
4.1.3 Consider strategies to improve remote and in-office work efficiencies.		
4.1.4 Develop performance and incentive plans for staff.		
2. Improve the quality of internal systems.		
4.2.1 Review internal programs to determine mission alignment and business strategy.		
4.2.2 Develop orientation process for new hires.		
4.2.3 Ensure ongoing staff education.		
4.2.4 Transition to and utilize Foundant.		
4.2.5 Maintain financial compliance.		
3. Explore and implement improved organizational practices.		
4.3.1 Improve transparency of organizational reports with the community.		
4.3.2 Research Community Foundation Accreditation.		