



Strategic Plan 2025 – 2035

About

Since 2016, the **Fort Walton Beach Sigma Foundation** (hereafter "Foundation") has operated exclusively for charitable purposes, without limitation, acting as an instrumental way for youth to be encouraged and inspired to achieve academic success through mentoring. The Foundation engaged in various educational, social, and community activities to promote society and raise funds to support and assist other nonprofit organizations that would not otherwise benefit. The Foundation solicited contributions from corporations, other philanthropic partners, and volunteers to provide the monetary and human resources needed to develop and execute its activities and programs.

The Foundation contributed to the community by organizing engagement activities to fulfill its objectives. To achieve this, it participated in various necessary or incidental activities to its mission of support, exercising all lawful powers and authority to collaborate with foundations, nonprofits, and private and public companies throughout Florida.

Now, the Foundation focuses on membership growth and improved community support through increased drives, sustained scholarships, and the creation of personal support programs and services. The Foundation will continue to be a role model, leading others, innovating community support, and leading wellness efforts.

Mission

To support the community through charitable activities and efforts, such as leading drives (e.g., clothing, coats, and food) to help children, people experiencing homelessness, and those in shelters. Partner with schools, colleges, and universities by providing supplies, mentoring, and scholarships. To continue coaching, mentoring, and counseling those needing encouragement, direction, or wellness.

Vision

To be the community-recognized premier charitable organization for leadership, innovative support ideas, and service to the community.

Core Values

Leadership
Innovation

Empathy
Service

Needs Statement

The Foundation needs financial and material support from donors. The current level of donations only allows us to complete one event per type a year. Due to our limited funding, we often must tell those in need that we have no more to give. Without these dwindling

resources, the Foundation cannot support the community's needs through food and clothing drives, scholarships for college-bound students, or wellness events.

Goals

- 1. Increase Funding Program**
- 2. Grow Membership Program**
- 3. Increase and Sustain the Scholarship Program**
- 4. Increase and Sustain Giving (Drives) Program**
- 5. Increase and Sustain the Mentoring, Coaching, and Wellness Programs**

Objectives

Goal 1

1. Increase Funding Program - We must raise funds to meet our mission. Key Stakeholders (KS) – Foundation and all elements supported by the Foundation.
 - 1.1. Set annual fundraising goals by January 31.**
 - 1.2. Establish levels of giving acknowledgments by January 31.**
 - 1.3. Set a communications plan for working towards goals/achieved/short by February 15.**
 - 1.4. Establish the annual Board of Directors (BOD) give/get program requirements by March 31.**
 - 1.5. Establish a tracking system for donor support by January 31.**
 - 1.5.1. Update the system annually with a final report due by February 15.**

Goal 2

2. Grow Membership Program - We can do more activities, think larger, reach further, and raise more money with members. This program will allow members to submit suggestions for areas where the Foundation can support the community. KS – Foundation, to wit the community.
 - 2.1. Set annual growth goals by January 31.**
 - 2.2. Establish the Board of Directors and update the Bylaws to reflect their authority and responsibilities by the end of Q2 2026.**
 - 2.3. Establish a membership program (\$60) annually per member by March 31, 2025.**
 - 2.4. Establish a framework for an annual report to be posted on our website by March 31.**
 - 2.4.1. Establish quarterly program reports.**
 - 2.4.2. Report on all programs in the annual report.**

- 2.4.3. Include all metric reports each quarter and a tally for the annual report.**
- 2.5. Establish metrics for all programs by March 31, 2025:**
 - 2.5.1. Grant management (submitted, awarded, denied).**
 - 2.5.2. Membership fees paid on time v. those late.**
 - 2.5.3. BOD fees paid on time v. those late.**
 - 2.5.4. Report finances for the year in an annual report.**

Goal 3

- 3. Increase and Sustain the Scholarship Program. This program will allow us to submit grants from all levels of government and private corporations that want to donate to scholarships where they cannot directly grant funds. KS: College-bound students and community.
 - 3.1. Identify and prepare grant requests for all viable grant programs annually by March 31.**
 - 3.1.1. Report annually the sustained scholarship funding sources.**
 - 3.2. Create and maintain a funding (grant) application schedule by March 31.**
 - 3.3. Identify and expand specific funds to support programming by June 30.**

Goal 4

- 4. Increase and Sustain Giving (Drives) Program. This program will allow the Foundation to submit state and local grants to support our giving needs. KS – Community at large.
 - 4.1. Identify all shelters, orphanages, and homeless encampments in FWB by February 28, 2025, into a comprehensive list.**
 - 4.2. Sort the organizations by category, distance, and needs by March 15, 2025.**
 - 4.3. Develop an implementation plan using current resourcing programs to support the categorized organizations based on current giving program expectations and adjust by the end of Q1 (March 31, 2025).**

Goal 5

- 5. Increase and Sustain the Mentoring, Coaching, and Wellness Programs - This program will allow the Foundation to solicit funds from all government and private corporations that want to support these programs. KS – Community at large.
 - 5.1. Develop a mentoring program for the students by June 30, 2025.**
 - 5.1.1. Develop a tracking system for mentors and mentees.**
 - 5.1.2. Develop an evaluation survey for the mentees.**
 - 5.1.3. Develop an evaluation program for mentors.**
 - 5.2. Develop a coaching program for students and adults by June 30.**

- 5.2.1. Develop a tracking system for coaches.**
- 5.2.2. Develop an evaluation survey for those coached.**
- 5.2.3. Develop an evaluation program for coaches.**
- 5.3. Develop a wellness program for students and adults by June 30.**
 - 5.3.1. Develop a tracking system for wellness leaders.**
 - 5.3.1.1. Recruit or solicit assistance for wellness initiatives and coaches.**
 - 5.3.2. Develop an evaluation survey for wellness clients.**
 - 5.3.3. Develop an evaluation program for wellness leaders.**
- 5.4. Report results from all programs in the annual report.**