



DISMANTLING POVERTY. REBUILDING FOR EQUITY.

2022-2025 Strategic Plan



INTRODUCTION

Welcome to the 2022-2025 United Way Bay Area Strategic Plan, and the beginning of our next century of dismantling poverty and building equitable pathways to prosperity.

Over the last year we have worked together to understand who we are at the tumultuous end of this 100-year journey and who we need to be for the start of the next 100 years. We worked to understand how to evolve and strengthen UWBA to meet current and emerging community needs as we grapple together with ongoing crises, injustice and inequities. A transformative \$20 million gift from MacKenzie Scott allowed us to set a three-year timeframe to honor and guide our continued learning and growth. We created four planning pillars: Community Impact, Regional Impact, Financial Growth and Sustainability, and Operations and Culture. In 2021 we focused on self-reflection and assessment, on dreaming big and dreaming practically about how we can better achieve our mission by 2025. I am excited to share this roadmap to launch us into our centennial year and invite you to join us on this journey of hope, inspiration, and action. Together, we will respond, recover and rebuild as we work toward an equitable Bay Area where all people have the opportunities and resources needed to thrive.



A handwritten signature in black ink, appearing to read 'Kevin Zwick', written in a cursive style.

Kevin Zwick, CEO, United Way Bay Area

With gratitude to all of UWBA's staff members and departments, Strategic Planning Steering Council and Subcommittees, DEI Council, Board of Directors, Advisory Council, agency and community partners, funders, donors, and volunteers who contributed their time and expertise to creating this plan.

Developed in
partnership with



ABOUT UWBA

Since 1922, United Way Bay Area (UWBA) has worked to address the root causes of poverty in the San Francisco Bay Area region. Although our strategies and approach have changed over the past 100 years, our commitment to an equitable and thriving Bay Area remains the same.

“Our second century of impact begins with this bold plan. In it, we recommit ourselves to addressing the persistent inequities and emerging challenges which continue to trap too many of our neighbors in a cycle of poverty, impacting everyone throughout this region. If we all pull together, we can bring this plan to life and realize each of its worthy goals.”



Pierre Breber,
*Chair of the Board,
United Way Bay Area
Chief Financial Officer,
Chevron*

The events of the last two years have tested us as an organization and as a region—shining a light on the still growing social and economic inequities that continue to impact our communities. COVID-19 has disproportionately hurt communities of color, highlighting just how central fighting for racial equity is to achieving UWBA’s mission of breaking the cycle of poverty. Many Black, Indigenous, Latinx, Asian and people of color have been and continue to be systemically barred from economic opportunity. The ongoing wildfire crisis plaguing California has shown us that while we are all impacted by climate change, those with less resources due to structural inequities face more dire consequences. Through these challenges, UWBA leveraged our longstanding relationships and deep knowledge of the community to do what we do best in the aftermath of disasters: help the Bay Area respond, recover, and rebuild more equitably for the long term.

During this period, UWBA underwent significant transformation as an organization. We gained a largely new and expanded leadership team. We received a

transformative \$20 million gift that enabled us to immediately address the overwhelming needs in our communities and also dream big on the work to come. We began the hard work of reckoning with not just the role of systemic racism in our region but also our own role in perpetuating racism in our workplace and communities. We launched an ambitious new housing platform, refreshed our website and brand, and increased our capacity to engage in policy work.

This strategic planning journey helped us understand who we are as we conclude our first 100 years of service and who we need to be as we enter the next century of service. It is through the unwavering support of our partners and the strength of our communities that we can work together toward a brighter future. As we move toward transformation as a region and as a society, we hope you will join us in rebuilding **a more equitable Bay Area where all people have the opportunities and resources needed to thrive.**

The first key step in our planning process was to update our Vision, Mission, Values and Operating Principles to align with our current direction and future aspirations. Through an inclusive organization-wide process, we crafted a new succinct statement that will help guide our work through 2025.

Vision
UWBA envisions an equitable Bay Area where all people have the opportunities and resources needed to thrive.

Mission
UWBA mobilizes the Bay Area to dismantle the root causes of poverty and build equitable pathways to prosperity. Through initiatives and policy change, we provide immediate and long-term support for employment, housing, financial stability, and meeting basic needs.



Values

Respect: We honor the dignity, capabilities, and experiences of everyone.	Integrity: We speak and act in alignment with our values and our community's needs.	Accountability: We take responsibility for our actions in alignment with our values.	Equity: We are committed to providing people what they need to be successful. We will act to address structural inequities within our workplace and our communities to co-create a society where all can live to their full potential.
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For more information on our Operating Principles, see [Appendix A](#).

United Way Bay Area has been serving the needs of diverse residents for nearly a century within eight Bay Area Counties, including Alameda, Contra Costa, Marin, Napa, San Francisco, San Mateo, Santa Clara, and Solano. We recognize these are the unceded ancestral territories of the Ohlone, Miwok, Yukuts, and Patwin peoples who have lived in and moved through this region over hundreds of generations and who continue to live and work here today.

We continue to adapt to and evolve to ensure poverty-fighting programs meet local needs and address the community’s most pressing problems. Through direct programs that UWBA creates and administers, strategic investments, and advocating for policy change, we provide immediate and long-term support for individuals to meet their basic needs, find fulfilling and rewarding employment, access stable housing, and achieve financial stability.

The United Way Bay Area Impact Areas include:

Basic Needs	Employment & Career Opportunities	Financial Stability	Housing Justice
<i>Helping people who struggle to afford basic needs with programs, partnerships, policy work, funding and volunteer opportunities.</i>	<i>Working with businesses, nonprofits, school districts, and local governments to help young people build bright, thriving futures.</i>	<i>Helping address various aspects of financial stability so people can recover from a crisis quickly and rebuild their lives.</i>	<i>Working with community stakeholders and housing experts to improve access to stable, affordable housing and homelessness prevention.</i>

We accomplish this by uniting partners to address the current issues the community faces with both short-term and long-term solutions. We partner across sectors, develop innovative solutions, capture data to more deeply understand community needs, and use those insights to drive public policy change and create research-backed impact initiatives.



DIVERSITY, EQUITY, AND INCLUSION PLANNING PRINCIPLES

UWBA is committed to embodying the values of diversity, equity, and inclusion. Though we are early in our anti-racist journey, we are taking a deliberate approach to ensure that our internal and external practices combat institutional racism, bias, and ethnic discrimination. UWBA recognized

“Across sectors, everyone needs to own the issue of anti-racism in every way.”

Timothy J. Geraghty
Northern California Regional
President, Northern Trust

at the beginning of the planning process that racial equity and anti-racism needed to be a strategic thread throughout all areas of the plan. UWBA formed an internal DEI Council and worked closely with a DEI consultant, Davis & Associates, to assess our practices and policies and make recommendations to ensure progress and accountability towards becoming an anti-racist organization both within our organization and throughout our work. Together we applied a set of anti-racism principles and recommendations into the plan and planning process. The principles offer a proactive stance to

dismantling systemic racism both within the organization and within the community. *Learn more about our commitment to DEI and our DEI planning principles in [Appendix B](#).*



THE STRATEGIC PLAN

United Way Bay Area identified the need to engage in a focused, inclusive, and comprehensive three-year strategic plan to refine our focus and meet the unique and evolving needs of the communities we serve, rooted in diversity, equity, and inclusion. Throughout 2021, we partnered with social impact firm, Impact Launch, to help design and guide an inclusive and equity-driven strategic planning process. The planning process included a wide range of key stakeholder input, including partner agencies, community groups, Board and Advisory Council members, individual donors, elected officials, funders, corporate partners, in addition to all staff at all levels within the organization. *More information on who we engaged, and the valuable input they provided, can be found in [Appendix C](#).*

THE FOUR PILLARS OF OUR PLAN

Early in the planning process, it became clear that we needed to focus our attention on four aspects of our work which will be the most critical in supporting our next century of service. These four pillars of our plan are **Community Impact, Regional Impact, Financial Growth and Sustainability**, and **Operations and Culture**. Each pillar is defined by a set of focus areas, and the goals we have set to address those issues. We have also detailed strategies and metrics for each pillar, which can be found in [Appendix D](#). As we forge ahead together in our efforts to dismantle poverty, we must also rebuild for equity around these four pillars:

“As a donor, board member, and Women United council member, I have been deeply impressed by United Way Bay Area’s stewardship of contributions. I have witnessed firsthand how we transform financial support into tangible, lasting impact for Bay Area residents. Our new strategic plan only reinforces my conviction that UWBA plays an essential role as a positive change agent throughout our region.”



Michelle Branch
Board Director,
United Way Bay Area
Principal and Founder,
Branch Law Group



PILLAR 1: COMMUNITY IMPACT

Improve how we deliver our programs to achieve the impact our communities need while ensuring progress and accountability in our anti-racism journey.

United Way Bay Area’s strengths lie in our innovative programs and initiatives designed to meet current and urgent needs in our region. We design, launch, iterate, modify and expand or end programs and initiatives based on what we learn from data and insights from those most affected by our programs. We also know that our initiatives alone cannot dismantle systems – we need to pair our programs with impactful public policy advocacy to see systemic change. This first pillar therefore focuses on how, over the next three years, we will revamp our existing program offerings with a stronger lens towards equity, how we incorporate our new housing justice work, and how we ensure we have the tools to do the right research to support them. By 2025, United Way Bay Area programs, initiatives, and policy advocacy will be fully aligned, informed by data, focused on racial equity, and therefore have deeper impact on dismantling the root causes of poverty and building equitable pathways to prosperity for those who need them most.

FOCUS AREAS

- UWBA will work to build equitable access to basic needs and financial prosperity and change the inequitable systems that prevent Black, Indigenous, Latinx, Asian, and other people of color from meeting basic needs and building prosperity. Through this work, 1 million individuals will access what they need to meet basic needs and build prosperity.

1,000,000

GOAL: Serve 1 million people in our region

- UWBA will partner to address the housing crisis. Through this, we will further progress towards racial equity among Bay Area residents through access to quality, safe, and affordable housing.
- UWBA will use data to drive equity, shifting away from inconsistent, aggregated program data collection that has limited us in our ability to serve those disproportionately impacted by poverty. We will work toward consistent, disaggregated programmatic data by race and ethnicity to guide our racial equity work, evaluate progress, inform programmatic decisions, and communicate impact.

GOALS

Between January 2022-June 2025, UWBA will:

- 1 Increase numbers served of Black, Indigenous, Latinx, Asian and other people of color disproportionately impacted by poverty in our work to **help 1,000,000 people meet basic needs and access pathways to prosperity.**
- 2 Develop and implement a system for all programs to **collect disaggregated data by race and ethnicity** to inform program improvement and resource allocation.
- 3 **Advocate for policy and legislative solutions** that provide Black, Indigenous, Latinx, Asian and other people of color in communities most impacted by poverty access to what they need to meet basic needs and build prosperity.
- 4 Increase the organization's **focus on housing affordability and housing stability strategies** for specific racial groups disproportionately impacted by the housing crisis.
- 5 Help **increase public awareness, understanding, and support for housing solutions** that increase housing affordability for specific racial groups disproportionately impacted by the housing crisis.
- 6 Advocate for and support implementation of (where possible) 2-4 policies that **contribute to a reduction in the number of Bay Area households that are housing burdened** in areas impacted by a history of redlining and inequitable zoning policies.



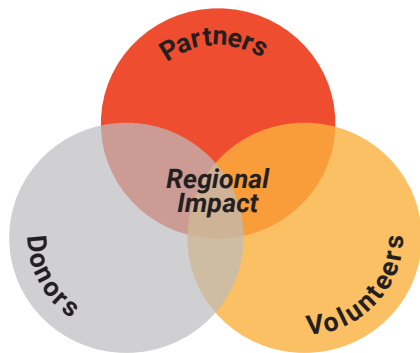
PILLAR 2: REGIONAL IMPACT

Expand our partnerships, programs, and initiatives regionally to address the unique and most urgent needs of geographies and communities disproportionately impacted by systemic racism.

United Way Bay Area occupies a unique position among nonprofit organizations. We cover a wide region, yet we strive to operate on a very local level in all eight counties in the Greater Bay Area. We see our regional presence as a strength and strive to take advantage of our regional presence to tackle the interconnected issues that affect all of us. UWBA is also unique in that our donors, supporters and volunteers come from all eight counties of our region. The challenge ahead of us is powering regional impact in a strategic, thoughtful, authentic and impactful way, given the needs and opportunities that outstrip our resources. By 2025, UWBA will be strongly engaged in all eight county communities, receiving input from representatives, and making program and partnership decisions based on a clear understanding of the unique needs of the region.

FOCUS AREAS

- UWBA will work to assess and mobilize on the unique needs of the region to address the root causes of poverty and reduce racial disparities. We will consistently make informed programmatic, partnership, and funding decisions based on the unique needs, challenges, and opportunities in each city/county/community.



- UWBA will work to strengthen regional representation and presence, ensuring volunteers, donors, and relationships are focused on true regional representation and impact.

“UWBA is a convener and can be a tremendous resource for bringing the right people together in the room, identifying needs, and focusing resources to alleviate and address those needs.”

Supervisor Erin Hannigan
Solano County Board of Supervisors

GOALS

Between January 2022-June 2025, UWBA will:

- 1 Reinforce our role as a regional entity that understands and acts on the unique needs **across each of the eight counties we serve.**
- 2 Establish a network of partners to proactively share and help scale **strategic, promising legislative policy and practice solutions** in 2-3 priority areas where people of color are disproportionately impacted.
- 3 Increase strategic cross-regional representation within UWBA affinity groups, volunteers, advisory council and board membership, **prioritizing equitable representation among Black, Indigenous, Latinx, Asian, and other communities** who have been most historically, persistently, and racially marginalized in the Bay Area.
- 4 **Increase participation in local civic boards and committees** in alignment with our mission and goals in geographies and communities in the region disproportionately impacted by systemic racism.



PILLAR 3:

FINANCIAL GROWTH AND SUSTAINABILITY

Develop and sustain a resilient 3-year budget to support our impact goals while ensuring progress and accountability in our anti-racism journey.

United Way Bay Area has bold plans to meet the greatest needs in our community, which requires engaging and inspiring the public to join in and support our work. In order to do this, we need to ensure that UWBA has the ongoing resources to invest in our initiatives and operate the programs on which so many in our communities rely. All United Ways, and particularly UWBA, know that in order to do this, we need to modernize our financial and funding models, continually connecting with more diverse individuals and institutions across the region in more impactful and inspirational ways. Because of our supporters, UWBA has been here for the community for the past 100 years. Achieving these financial growth and sustainability goals will help ensure we're on the right track to be here for the next 100 years. By 2025, United Way Bay Area will attract greater resources from more diverse and sustainable sources, in order to invest in immediate and long-term strategies to disrupt poverty.

FOCUS AREAS

- UWBA will develop sustainable resources for financial stability, increasing predictable, reliable, and diversified funding from individuals and institutions that are committed to addressing the root causes of poverty and advancing equity.
- UWBA will mobilize partners to contribute through understanding our impact, designing innovative programs and developing critical partnerships across the Bay Area to deliver on UWBA's Mission and Vision.

“I am proud to say that UWBA has long been a trusted partner in poverty-fighting initiatives designed for and informed by the Bay Area communities we serve. Together, we will continue to collaborate to build a brighter future, with a focus on ensuring equitable pathways to prosperity, addressing the racial wealth gap, and supporting the financial stability and empowerment of everyone we serve.”



Manuel J. Santamaria
*Vice President,
Community Action
Silicon Valley Community
Foundation*

GOALS

Between January 2022-June 2025, UWBA will:

- 1 Raise a total of \$30 million** in annual operating resources.
- 2 Double funding streams** that are new to UWBA **from diversified donors and sources.**
- 3 Meet our growth targets for contributions and achieve our strategic goals in a financially sustainable way.**
- 4 Ensure existing community partners, corporate partners, and individual donors and volunteers will be more engaged with UWBA through an increased understanding of how UWBA leverages funding for strategic impact** across the region.



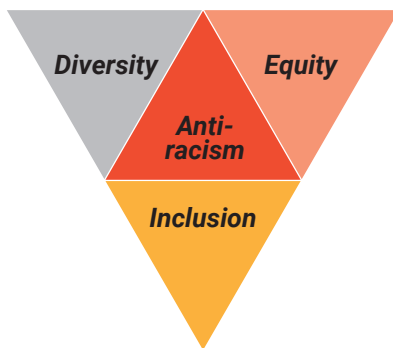
PILLAR 4: OPERATIONS AND CULTURE

Ensure all of our systems and processes reflect the current goals, needs and structure of the organization, our staff and the communities we serve in order to truly be an equitable and effective organization.

Any organization is only as good as its people, especially in the social impact sector. And our people can only do their best work when we ensure they have the systems, processes, policies and supports in place so they can thrive. Like many organizations, United Way Bay Area seeks to tackle racial injustice and systemic inequities – but that work must not solely focus outside our walls. We must focus internally as well. United Way Bay Area’s employees, leadership, volunteers and supporters must all work together to create not only a sense of inclusion and purpose, but a sense of belonging. By 2025, United Way Bay Area will have the systems and practices necessary to be an equitable and effective organization for our staff, volunteers and partners.

FOCUS AREAS

- UWBA is committed to driving continuous improvement of employee experience, increasing intentional focus on employee satisfaction at work.
- UWBA will work toward generating systems and processes in alignment with our current needs and goals to better serve the region.



- UWBA is committed to boldly addressing inequities both within our organization and in the community with intentional consistent practice of anti-racism and diversity, equity, and inclusion principles.

GOALS

Between January 2022-June 2025, UWBA will:

- 1 Ensure staff hold a high sense of **belonging**, feel **valued**, and feel **empowered to represent their identities** fully and authentically in the workplace.
- 2 **Have transparent career paths, wage structures and processes** that ensure UWBA staff are paid fairly and equitably while enabling us to be competitive in our recruitment efforts.
- 3 Empower staff leaders to proactively and inclusively **invest in their teams to achieve racial equity** in professional advancement.
- 4 Update financial, human resources, information technology, and general operating **systems to align with current needs**.
- 5 Ensure staff & Board have obtained and maintain baseline knowledge, awareness, and skills on **DEI and anti-racism competencies**.
- 6 Make certain there is racial equity among staff, leadership & Board, **prioritizing equitable representation** among communities who have been most historically, persistently, and racially marginalized in the Bay Area.
- 7 Consistently and boldly **speak up in alignment with our values and mission on equity issues** such as structural racism and classism related to addressing the root causes of poverty.
- 8 Certify that leadership **act on and regularly communicate about the state of DEI at UWBA**, including their individual and organizational learnings, and actions.

CALLS TO ACTION

We are all a part of the solution. What's your role?

JOIN

We are seeking to build and maintain a robust Advisory Council that authentically represents the Bay Area's diverse community. UWBA's Advisory Council meets regularly throughout the year and advises on our community impact, fundraising, and anti-racism journey. Through the Advisory Council we will help ensure we are meeting the goals of our Strategic Plan and will advise the Board of Directors on what needs to be done to ensure progress and success. Visit this link to nominate a Board/Advisory Council candidate: <https://www.uwba.org/nominate>

INVITE

We are a regional organization that works best when alongside our partners. We [welcome invitations](#) to coalitions, partnerships, and workplaces that share our vision of an equitable Bay Area where all people have the opportunities and resources needed to thrive.

SUPPORT

We need your support to successfully realize the vision set forth in this Strategic Plan. If you resonate with this vision and the goals we have outlined to achieve it, here are three ways that you can get involved:

- **FUNDING:** Help us meet our new, ambitious goals while continuing to address the overwhelming need in our region. [Make an investment](#) in disrupting poverty throughout the Bay Area now and commit to helping us build a more equitable future as we enter our next century of impact.
- **ADVOCACY:** [Help us advocate](#) for the policy changes we need to meet our mission. Join the policy campaigns we lead and amplify. And invite us to support your campaigns.
- **ACCOUNTABILITY:** Help us stay accountable to meeting our goals effectively and efficiently, while continually centering equity. [Let us know](#) if what we are doing is working, what we can be doing more of and what we can be doing differently.