



# DISMANTLING POVERTY. REBUILDING FOR EQUITY.

## 2022-2025 Strategic Plan Appendix

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Developed in  
partnership with

 **Impact Launch**  
Strategy for Equitable & Sustainable Change



# APPENDIX A: OPERATING PRINCIPLES

## CENTERING OUR WORK

We will include the communities we serve in our impact work, goals, strategies, fundraising, and operations. We will listen to and amplify community voices to affect change on the issues that impact them the most.

## TRANSPARENCY

We will be transparent about our processes and metrics through ongoing and consistent communication with staff, partners, funders, and our community.

## COLLABORATION

We will initiate and support open, honest, and mutual relationships to break down silos and achieve common goals.

## SPEAKING UP AND SPEAKING OUT

We will stand with equity and justice even when it is unpopular or uncomfortable.

## CONTINUOUS LEARNING

We will use data and evaluation for on-going learning and improvement to better align our impact with our values and to improve the effectiveness and reach of our program work.

## SYSTEMS APPROACH

We will address the systems that uphold structural inequities in order to affect sustainable change.

## ANTI-RACISM

We will commit to an individual and organizational approach to dismantling racism in all its forms, with an emphasis on countering racial inequities faced by Black, Indigenous, Latinx, Asian, and other People of Color. We will implement equitable systems, policies, and practices within our workplace and our communities.





## APPENDIX B:

# UWBA COMMITMENT TO DEI

**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.**

- We recognize structural racism, ethnic discrimination, and other forms of oppression have contributed to the persistent disparities United Way seeks to dismantle.
- We understand that these disparities have existed in the past and persist into the present.
- We acknowledge that these inequities are the result of policies and practices that work to marginalize entire populations of people.
- We unequivocally denounce racism and ethnic discrimination because they undermine the well-being and vitality of all communities.
- Our United Way network strives to engage community members and elevate the voices of those who have traditionally been marginalized.
- We work with residents and public and private partners to co-create solutions that ensure everyone has the resources, support, opportunities, and networks they need to thrive.
- We commit to leveraging all our assets – convening, strategic investments, awareness building, and advocacy – to create more equitable communities.

***As such, UWBA will:***

- Use equity-centered program design, implementation, and funding to address barriers for people of color and actively partner with Black, Indigenous, Latinx, Asian and other people of color-led organizations in addition to other organizations that share our values.
- Regularly disaggregate and analyze our client and community-level data to ensure equitable resource distribution and outcomes.
- Continue to work with communities of color through our wealth-building and poverty-fighting programs.
- Help build power in the community by engaging people and institutions in policy advocacy and civic engagement.

# DIVERSITY, EQUITY, AND INCLUSION ACTION STEPS

In Spring 2021, United Way Bay Area, led by our staff DEI Council, engaged consultant Ryan Davis of 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 in our community work. After several months of deep dialogue, interviews, focus groups, questionnaires and other input sessions that included all members of our organization, we finalized a DEI Action Plan focused on 10 specific parts of the organization and resulted in more than 50 actionable, concrete, and accountable actions we can take to achieve our goal of being a more anti-racist organization and to better center racial equity and racial justice in our work. This work then formed the foundation for our strategic plan, and nearly all recommended actions were embedded into our strategic plan along with timelines for completion over the next three years. The DEI Action Plan goal is to create a more equitable and anti-racist organization so that we can better meet our mission to dismantle the root causes of poverty and build more equitable pathways to prosperity in the Bay Area.

## 1. FOUNDATIONAL

***Focus: Set critical baseline structure for UWBA***

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1. Develop a UWBA DEI-related glossary of terms.
2. Determine UWBA language to characterize priority populations (e.g., communities that have been historically, persistently, and racially marginalized), then characterize priority populations for each project or program based on demographic community data (e.g., Black, Latinx, Southeast Asian, Indigenous for rent relief program), while maintaining open participation to all who are eligible.

## 2. SEARCH AND SELECTION

***Focus: Staff, leadership, boards, and funded partners reflect the communities UWBA serves***

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1. Continue to assess the impact of de-biasing the search process (e.g., by blinding institutional affiliation).
2. Add UWBA's commitment to DEI to job postings for staff positions (in progress).
3. Develop equity-minded screening and interview questions with clear criteria for selection
4. Job search teams are trained on implicit bias and anti-racism practices in search processes such as how to network job postings, and how to provide access to tools and resources for candidates that have been historically overlooked or disadvantaged for positions. Develop process for creating diverse job search teams.



5. Continue collaborating with DEI experts as necessary to ensure ongoing momentum and implementation support for recommendations embedded herein.
6. Provide employee incentives for employee referrals that lead to greater staff equity and diversity goals.
7. Diversify the UWBA Board, Council, leadership team, and staff, prioritizing equitable representation at all levels of the organization from communities who have been the most historically, persistently, and racially marginalized in the Bay Area, while secondarily considering the value of equitable racial representation in staff and leadership among all racial groups in the Bay Area. Regardless of racial/ethnic identity, hiring processes should assess a job candidate's demonstrated commitment to DEI and/or anti-racism and which ultimately results in ensuring and maintaining racial equity among staff.
8. Track hiring pool data by race.
9. Create a DEI leadership-level professional role with necessary supports and collaborators who leads DEI/anti-racism work for UWBA that includes but may not be limited to: provides guidance to support affinity groups; provides leadership and structure to chair the DEI Council; collaborates with DEI Council for emerging equity issues organizationally, locally, nationally and globally; leads collaborative efforts within UWBA to develop and implement DEI tools and resources; provides guidance on engaging employees around identity-based months and weeks/days; advises the CEO and leadership team on DEI and anti-racism matters; and helps advise the Board of Directors on governance matters related to DEI and anti-racism.
10. Identify and align with organizations that will help UWBA espouse its commitment to anti-racism by assessing whether the partnership will advance racial equity. Also identify the extent to which (and correct for) investing in partnerships that employ professionals and host volunteers who proportionately reflect the racialized communities UWBA is aiming to serve.

### 3. PROFESSIONAL ADVANCEMENT AND EMPLOYEE RETENTION

***Focus: People leaders proactively and inclusively invest in their teams to achieve racial equity in professional advancement***

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1. Train managers in how to invest in staff generally and develop equity-minded approaches to inclusive leadership specifically (e.g., intentionality and collaboration with underrepresented employees about promotion pathways). Provide clarity and resources to ensure staff are getting support they need to be successful in their jobs and that managers are providing these resources in an equitable and anti-racist manner.
2. Examine employee promotion data by race and set organizational goals, tactics, and assessment processes.

3. Consider collecting and examining employee departure trends, and having the ability to disaggregate by race. Complement numerical data with a process that collects exit interview data as employees transition from UWBA to discern and address possible reasons for departure with the goal of increasing employee retention.
4. Examine results and patterns to take action based on findings from compensation study. Clarify different levels and how to move up between levels. Integrate findings and recommendations into DEI plan. Incorporate DEI principles in compensation work from the beginning to ensure pay equity across race and gender is established and processes are in place to ensure sustainability. Supplement compensation work with establishing job classifications and career pathways to establish clarity about what it takes to move up levels at UWBA.

## 4. EDUCATION AND TRAINING

***Focus: Staff has obtained and maintains baseline knowledge, awareness, and skills on DEI and anti-racism competencies***

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1. Require DEI education (with flexible options based on individual learners - different levels of training to account for varying levels of familiarity/confidence/practice of DEI issues) and training on UWBA DEI commitments (org values, DEI plan, policies and practices in place to become an anti-racist org, expectations of staff) during onboarding and for leaders in order to access and maintain role.
2. Require team training on identifying and applying anti-racism principles at UWBA.
3. Require DEI education and training on UWBA DEI commitments for board/advisory council, including but not limited to DEI education and training during an orientation process for the Board/Council.
4. Continue professional education with sessions all staff must attend or complete.
5. Expand professional education to partners.

## 5. CULTURALLY-RESPONSIVE AND ANTI-RACIST COMMUNITY & CLIENT ENGAGEMENT

***Focus: Combat generations of systemic racism and structural inequities through our work***

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1. Develop community agreements for program volunteers who interact with community members UWBA serves to ensure cultural responsiveness in their approach.
2. Consider Volunteer Leadership affinity group focused on anti-racism (similar to Women United or Emerging Leaders).

3. Make main website and program websites/information/communications available to community and clients in Spanish given clients who speak Spanish represent a large portion of UWBA's client base. Consider expanding to additional languages as necessary to reach clients.
4. Identify and mitigate (while striving to eliminate) ways in which UWBA has and continues to perpetuate anti-blackness.
5. Examine and redress the effects of racism on basic needs outcomes in communities that have been historically and persistently marginalized in the Bay Area (e.g., Black, Indigenous, Latinx, Asian and Pacific Islander communities).
6. Increase fundraising for racial equity and justice by seeking and obtaining funding designed to disrupt structural racism and reduce racial disparities.

## 6. INTERNAL CLIMATE AND CULTURE

***Focus: Staff have a high sense of belonging and value, and feel empowered to represent their identities fully and authentically in the workplace***

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1. Update website with all staff members (complete).
2. Revise the climate survey, keep some questions to capture comparable data from prior years while updating questions to reflect constructs of current interest (e.g., how inclusion and belonging are measured, how anti-racism is considered). Consider combining the DEI survey and climate survey. Collect demographic data to be able to disaggregate findings by race.
3. Review and Revise climate survey questions to include UWBA's progress towards anti-racism goals.
4. Use climate survey data, professional learning for people leaders, and qualitative assessment to identify areas for growth.
5. Expand staff affinity groups to include one with an anti-racism focus (make voluntary and include curriculum to guide focus).
6. Gain organizational clarity on what months/days/weeks UWBA will acknowledge and how.



## 7. LEADERSHIP AND COMMUNICATION

***Focus: Leadership acts on and regularly communicates about the state of DEI, their individual and organizational learnings, and actions. Staff, as a result, feel empowered and encouraged to uphold anti-racist values and actions***

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1. Leadership team members are equitably represented as executive sponsors and leads on DEI goals in strategic plan.
2. Cascade high-level DEI goals into an employee responsibility matrix.
3. Establish a process and cadence for the DEI Council and Leadership Team being in regular communication and coordination, perhaps quarterly meetings. CEO, DEI leadership-level staff person and DEI Council collaborate to define what quarterly success entails, and provide updates about DEI and anti-racism progress at UWBA from the CEO (perhaps in collaboration with the DEI leadership-level staff person) is provided to internal UWBA staff (and externally where appropriate) to maintain transparency.
4. Develop a guiding document and professional education for communicating and messaging about race and intersecting aspects of identity in marketing and communications (as well as volunteer calendars and fundraising initiatives) in general, and during identity-specific months, weeks, and days in particular, so marketing feels authentic and not tokenizing.
5. Establish clearer, organizationally accepted communication structures to create an environment where all people feel empowered and safe to help hold each other accountable, especially through conveying feedback to managers / senior leaders.
6. Develop an annual DEI report for UWBA, eventually culminating into more regular updates throughout the year as the body of work continues to formalize.
7. UWBA will share its approaches to DEI work, lessons learned, and progress made on their efforts externally.

## 8. ACCOUNTABILITY

***Focus: Staff are accountable to DEI and anti-racism goals through tangible measures, processes, and reward structures***

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1. Embed DEI goals into employee performance appraisals, employee improvement plans, bonuses, merit increases, promotion criteria, and other reviews to guide individual employee growth and development, as well as avenues to inform, in part, which employees are elevated and promoted at UWBA.
2. Explore ways to resolve racial burdens on staff persons of color who often disproportionately contribute to DEI work.

## 9. DATA & ASSESSMENT

***Focus: UWBA is clear and transparent about its focus and progress through disaggregating data and sharing it regularly***

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1. Establish logic models and/or theory of action, such as those created for SparkPoint, to guide DEI work that includes clear and measurable goals, and help inform how actions will lead to outcomes.
2. Ensure each program and philanthropic endeavor collects data disaggregating by each racial identity, make data available to UWBA staff, and address racial inequities.
3. Establish a process for how staff is informed about UWBA programs and their impact.

## 10. POLICY AND PROCEDURES

***Focus: UWBA policies, procedures, and processes humanize employees and accelerate racial equity and anti-racism***

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1. DEI and Anti-racism Statement to Website (complete) with annual reviews and updates as necessary.
2. Modify anti-racist planning principles to a more concise, general UWBA anti-racism decision-making, programming, and vendor/consultant selection guide.
3. Establish greater structure to the DEI Council (e.g., terms of service, demonstrated commitment to join, questionnaire/reflection questions for review, representation across departments, term limits, duties and expectations, compensation, and a process for scanning/auditing policies and procedures to check for bias and values that are incongruent with UWBA's anti-racist principles).
4. Consider making vacation days equitable across job grades.
5. In all cases, change "male" to "man" and "female" to "woman." You can still ask federally required sex questions.
6. Utilize anti-racist principles guide to assist how decisions are made at UWBA.
7. Explore the possibility of adding two paid vacation days to allow employees to observe religious and cultural observation days of their choice.
8. Prioritize and/or emphasize partners (e.g., donors, grantees, collaborators) that share UWBA's vision of intersectionality and anti-racism.
9. Expand confidential and optional data collection efforts to include religious identity, sexual orientation, and gender identity, as well as racial subgroups.



## APPENDIX C: STAKEHOLDER INPUT

The UWBA planning process was inclusive of a wide range of key stakeholder input. Stakeholder interviews and focus groups included 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. We asked these diverse stakeholders to share their thoughts on what they feel are the strengths of UWBA, what needs they are observing, and what they would like the UWBA to work on over the next three years.

*The overarching themes from these conversations include:*

- UWBA is a strong regional convener and brings diverse partners together to address complex social issues.
- As we look toward the future, stakeholders encouraged UWBA to bring partners together to leverage each other's strengths and contributions.
- UWBA has brand recognition as a trusted partner and that the United Way brand brings volunteers, partners, donors and policy efforts forward.
- UWBA is known as a facilitator of community collaborations.
- UWBA is known for its longstanding dedication toward addressing the root causes of poverty and should continue to do so.





# APPENDIX D: PLAN DETAILS

# 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.**

## FOCUS AREA #1

### Build Equitable Access to Basic Needs and Financial Prosperity

**Goal #1: Between January 2022- June 2025, UWBA will 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.**

***Strategies:***

1. Assess current programming to determine racial equity strengths and gaps and create program plans to close identified gaps.
2. Assess program strategies against UWBA's updated mission/vision and revenue strategies and create plans to achieve better alignment and ensure appropriate scale and impact.
3. Increase cultural competency of UWBA staff and program volunteers to ensure cultural responsiveness in their approach.
4. Shift and/or increase program funding and strategy to focus on reducing racial inequities, including those related to immigration status, in communities where Black, Indigenous, Latinx, Asian and other people of color are disproportionately impacted by poverty.

***Metrics: How would we know when the goal has been accomplished?***

1. Milestone, Y1 or Y2 - 100% of programs will have a system in place to collect disaggregated data and report the data on a common template.
2. 100% of program funding going to organizations that serve majority Black, Indigenous, Latinx, Asian and other communities of color and/or organizations led by those communities.

3. 100% of staff, and program volunteers trained in cultural competencies on an annual basis and/or prior to volunteer activities.

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**Goal #2: Between January 2022- June 2025, UWBA will 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.**

***Strategies:***

1. Work with community partners to identify or create 1-2 promising policies or practices that redress the immediate and long-term effects of systemic racism on basic needs outcomes in communities that have been historically and persistently marginalized in the Bay Area.
2. Mobilize partners and volunteers in an outreach & awareness campaign around the selected policies/practices.

***Metrics: How would we know when the goal has been accomplished?***

1. 1-2 policies identified and advocated for and/or practices adopted in disproportionately impacted communities.
2. Number of partnerships with advocacy organizations and coalitions.
3. Number of impressions made during advocacy campaigns.
4. 1-2 implementation toolkits developed to help guide elected and appointed officials for policies adopted/passed.

## **FOCUS AREA #2**

### **Address the Housing Crisis**

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**Goal #1: Between January 2022- June 2025, UWBA will increase the organization's focus on housing affordability and housing stability strategies for specific racial groups disproportionately impacted by the housing crisis.**

***Strategies:***

1. Integrate or increase housing support and stability strategies into existing policy & program work where it is missing.
2. Increase support in zip codes where racial groups are disproportionately impacted relative to their demographic representation.

3. Support housing innovations that increase housing equity.

***Metrics: How would we know when the goal has been accomplished?***

1. Number of individuals/households provided rental assistance through SparkPoint.
2. 211 – number of callers provided housing assistance resource info.
3. EFSP/EAN - number of individuals/households provided housing supports including rental assistance through funded partners.
4. 100% of UWBA's programs begin to collect housing data more consistently and robustly.
5. Number of housing partners, grantees, projects supported.
6. Number of policies supported/advocated for.
7. Resources focused on specific zip codes where racial groups are disproportionately and systematically impacted by the housing crisis relative to their demographic representation.

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**Goal #2: Between January 2022- June 2025, UWBA will help increase public awareness, understanding, and support for housing solutions that increase housing affordability for specific racial groups disproportionately impacted by the housing crisis.**

***Strategies:***

1. Amplify existing efforts of regional and local housing policy organizations in alignment with their needs.
2. Develop and launch a public will campaign.

***Metrics: How would we know when the goal has been accomplished?***

1. Number of individuals reached through platforms used in campaign.
2. Regional polling on attitudes – existing land use policy polling may be of use for measuring this.

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**Goal #3: Between January 2022- June 2025, UWBA will 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.**

*\*paying over 30% of their income on housing*

***Strategies:***

1. Conduct an analysis of policies that have the most potential to address the housing burden, and advocacy campaigns already in progress.
2. Support or create housing related policy advocacy for identified promising policies.
3. Launch policy campaigns focused on these policies and support implementation where possible.



***Metrics: How would we know when the goal has been accomplished?***

1. Number of policies supported/advocated for.
2. Stabilization of displacement crisis/net outflow of specific racial/income groups in regions (use ACS data on census tract outflows).

## **FOCUS AREA #3**

### **Use Data to Drive Equity**

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**Goal #1: Between January 2022- June 2025, develop and implement a system for all programs to collect disaggregated data by race and ethnicity to inform program improvement and resource allocation.**

***Strategies:***

1. Standardize data collection across UWBA programs.
2. Standardize reporting across UWBA programs.
3. Utilize data to inform programmatic decisions.

***Metrics: How would we know when the goal has been accomplished?***

1. 100% of programs will have a system in place to collect disaggregated data and report the data on a common template.
2. 100% of programs with data collection systems established.
3. 100% of programs that conducted and learned from annual (or more frequent) feedback surveys.
4. Programmatic decisions made based on disaggregated data.



# APPENDIX D: PLAN DETAILS

# 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.**

## FOCUS AREA #1

### Assess and Mobilize on the Unique Needs Across the Region

**Goal #1: Between January 2022- June 2025, UWBA will reinforce our role as a regional entity that understands and acts on the unique needs across each of the eight counties we serve.**

**Strategies:**

1. Establish baseline data on current partnerships by identifying existing partnerships and gaps by geography in programs, volunteer engagement, fundraising and grant making.
2. Assess and share information with partners about high priority communities impacted by systemic racism and poverty, using available community data (e.g. Real Cost Measure).
3. Strategically shift resources/grant making to address the unique needs in identified priority areas in alignment with UWBA's mission.
4. Mobilize partners to act in service of the identified priorities.

**Metrics: How would we know when the goal has been accomplished?**

1. Baseline assessment of what areas are currently being served by UWBA and what is missing (Salesforce, landscape survey, geography and other demographic data on clients, funded agency partners/grantees, committees, funders, donors, board/advisory council membership, workplace partners, volunteers).
2. Distribution of programs, volunteer engagement, fundraising and grant making is proportional to the distribution of need.

3. Consistent sharing of information about unique needs in high priority communities impacted by systemic racism and poverty.

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**Goal 2: Between January 2022- June 2025, UWBA will 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.**

***Strategies:***

1. Research and identify promising practices and policies.
2. Produce report to share promising practices and policies with partners across the region.
3. Establish partnerships, initiatives and/or hold convenings on promising policy and practices solutions in communities with disproportionately impacted populations.

***Metrics: How would we know when the goal has been accomplished?***

1. Promising policy and practice reports produced.
2. Partnerships/initiatives/convenings established.
3. Practices and/or policies adopted.

## **FOCUS AREA #2**

### **Strengthen Regional Representation & Presence**

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**Goal #1: Between January 2022- June 2025, UWBA will 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.**

***Strategies:***

1. Establish baseline data of existing geographic, demographic and sector representation on UWBA's boards and groups, identify gaps.
2. Diversify representation by geography, demographics, and sector based on baseline data and in service of meeting UWBA's mission & strategic goals.
3. Increase pipeline of volunteers and increase short-term and long-term opportunities for volunteer involvement for priority geographies and sectors.



***Metrics: How would we know when the goal has been accomplished?***

1. Number of members on UWBA committees and groups that represent priority geographies and sectors.
  2. Number of volunteers who represent priority geographies and sectors.
  3. Participation and representation in UWBA bodies reflects the diversity in priority geographies and sectors.
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**Goal 2: Between January 2022- June 2025, UWBA will 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.**

***Strategies:***

1. Establish baseline data of existing participation in local civic boards and committees related to UWBA's mission by geography, and identify gaps.
2. Identify staff and volunteers to serve on priority committees and maintain accountability to represent certain regions.
3. Diversify participation and representation by geography and issue area based on baseline data.

***Metrics: How would we know when the goal has been accomplished?***

1. UWBA presence on local civic boards and committees in prioritized geographies and issue areas.
2. Participation and representation by UWBA reflects the diversity in priority geographies and sectors.



# APPENDIX D: PLAN DETAILS

# 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.**

## **FOCUS AREA #1**

### **Develop Sustainable Resources for Financial Stability**

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**Goal #1: Between January 2022- June 2025, UWBA will raise a total of \$30 million in annual operating resources.**

***Strategies:***

1. Increase strategic revenue portfolio management.
2. Holistically engage and sustain existing partnerships and relationships across the organization.
3. Design creative and tailored ways of engaging donors and partners.

***Metrics: How would we know when the goal has been accomplished?***

1. Revenue, by initiative broken down by type of donor.
2. Year over Year Growth of 35%.
3. Increase donor retention rate by 15%.
4. Expand Workplace Campaigns also making Corporate Gifts by 20%.

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**Goal #2: Between January 2022- June 2025, UWBA will double funding streams that are new to UWBA from diversified donors and sources.**

***Strategies:***

1. Increase holistic engagement of donors within racial and ethnic demographics aligned with the communities we serve.
2. Leverage the networks of Board members, Advisory Council members and funder partners.
3. Create programming and campaigns designed for new priority audiences.
4. Implement strategically tailored campaigns to increase consistent sustained support.

***Metrics: How would we know when the goal has been accomplished?***

1. Number of campaigns and programs designed for new priority audiences.
  2. Increased diversity based on demographic data from donors.
  3. Grow tech sector revenue by 15%.
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**Goal 3: Between January 2022- June 2025, UWBA will meet our growth targets for contributions and achieve our strategic goals in a financially sustainable way.**

***Strategies:***

1. Periodic evaluation of development and marketing campaigns to determine return on investment.
2. Periodic evaluation of program and services portfolio to determine return on impact and investment decisions.
3. Align staff capacity and roles with financial resources and strategic needs.

***Metrics: How would we know when the goal has been accomplished?***

1. Year over Year Growth of 35%.
2. Increase donor retention rate by 15%.
3. Expand Workplace Campaigns also making Corporate Gifts by 20%.

## FOCUS AREA #2

# Mobilize Partners Through Understanding Our Impact

**Goal #1: Between January 2022- June 2025, UWBA will 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.**

***Strategies:***

1. Engage the community with consistent messaging and powerful storytelling about UWBA and those we serve using disaggregated program data and community voice.
2. Consistently align materials with UWBA's mission and impact, lifting up human-centered stories particularly in Black, Indigenous, Latinx, Asian and other People of Color & immigrant communities and the need for increased investment.
3. Ensure external communications are equitable across appropriate languages and geographies in alignment with the needs of priority communities.

***Metrics: How would we know when the goal has been accomplished?***

1. Improve Brand Health Study outcomes from August 2021 baseline:

By end of FY2022:

- A. Awareness = 75%
- B. Understanding = 50%
- C. Consideration = 40%

By end of FY2025

- A. Awareness = 90%
- B. Understanding = 65%
- C. Consideration = 50%

2. Grow owned contact list to 50,000 members by end of FY2022:
  - C. Email open rate of 15%
  - D. Click-through rate of 4%

3. Improve website metrics as a proxy for improved engagement (Bay Area cities only; ex career seekers; by end of FY2022):
  - A. Total web visitors of 25,000
  - B. 2.0 sessions per user
  - C. 3.5 pages per session
  - D. Bounce rate 50% or lower
4. Reach or exceed monthly follower growth rate for (by end of FY2022):
  - A. Instagram: 150%
  - B. Facebook: 20%
  - C. Twitter: 50%
  - D. LinkedIn: 150%





# APPENDIX D: PLAN DETAILS

# 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.

## FOCUS AREA #1

### Drive Continuous Improvement of Employee Experience

**Goal #1: Between January 2022- June 2025, UWBA will ensure staff hold a high sense of belonging, feel valued, and feel empowered to represent their identities fully and authentically in the workplace.**

**Strategies:**

1. Identify and implement organizational practices that increase Appreciation, Respect and Trust as indicators of Belonging.
2. Update and leverage the annual climate survey to measure and track inclusion, belonging, anti-racism and related factors using disaggregated demographic data.
3. Leverage climate survey data for learning for people leaders and implement an accountability process for improving on climate survey indicators.
4. Expand staff affinity groups to include one with an anti-racism focus.

**Metrics: How would we know when the goal has been accomplished?**

1. Track data from new bellwether questions in the annual climate survey that include key indicators of inclusion and belonging, such as:
  - Valued: Being recognized for accomplishments; contributions and input in team meetings are valued; transparent communication about important organizational information/updates.
  - Belonging: comfortable being myself at work; opportunities to express opinions freely.

2. Track and report on retention rates over 3-year period by demographic and role.
  3. Identify themes in exit interviews & stay interviews related to employee experience of belonging and value.
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**Goal 2: Between January 2022- June 2025, UWBA will 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.**

***Strategies:***

1. Establish and share with staff Standard Operating Procedures that reflect UWBA's compensation philosophy, performance evaluation process and career pathway structure.
2. Provide equitable training, professional development and growth opportunities for staff and managers.
3. Implement a review of UWBA's compensation to check UWBA against the market & industry at the close of the 3-year strategic plan to inform plan moving forward.
4. Pay 100% of staff in market range of pay grade and ensure equitable benefits across job grades such as vacation days across by Y1.
5. Embed DEI goals into employee performance appraisals, employee improvement plans, bonuses, merit increases, promotion criteria, to guide individual employee growth and development, as well as avenues to inform, in part, which employees are elevated and promoted at UWBA.

***Metrics: How would we know when the goal has been accomplished?***

1. Annual job description review.
  2. 3rd year (2024) assessment of job classification and compensation with comparison to market, results shared with all staff and board.
  3. Percentage of staff that are paid at market range of pay grade.
  4. Climate survey question that measures clarity of career path structure, alignment of practice with compensation structure, alignment of work with job classification.
  5. Track and report on promotion metrics to determine % of hires made internally.
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**Goal 3: Between January 2022- June 2025, UWBA will empower staff leaders to proactively and inclusively invest in their teams to achieve racial equity in professional advancement.**

***Strategies:***

1. Train managers in how to invest in staff generally and equity-minded approaches to inclusive leadership specifically.

2. Examine employee promotion data by race and set organizational goals, tactics, and assessment processes.
3. Collect and examine employee departure trends, disaggregated by race.

***Metrics: How would we know when the goal has been accomplished?***

1. Number of equity focused trainings and professional development opportunities that managers participate in.
2. Percentage of staff that report they have what they need (climate survey).
3. Track, report, and improve on retention rates over 3-year period by demographic and role.
4. Track, report, and improve on promotion rates over 3-year period by demographic and role.
5. Track staff and departmental resources and participation in professional development opportunities from an equity standpoint.

## **FOCUS AREA 2:**

### **Generate Systems & Processes in Alignment with Current Needs**

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**Goal 1: Between January 2022- June 2025, UWBA will update financial, human resources, information technology, and general operating systems to align with current needs.**

***Strategies:***

1. Assess current pain points, outdated systems and practices.
2. Implement recommendations in DEI Assessment related to Finance, HR, IT.
3. Shift systems and practices in finance, HR and IT to address pain points and current needs.
4. Update Standard Operating Procedures to reflect current/new systems and practices.
5. Implement controls and schedule of systems evaluation to minimize redundancies.

***Metrics: How would we know when the goal has been accomplished?***

1. Provide transparent and timely reporting and accessibility to financial information for all key stakeholders.
2. Account Receivable and Accounts Payable schedules are established, with the necessary information provided to key stakeholders in a timely and predictable manner.

3. System end users are trained for all applicable systems, including ADP, Concur, MIP and SCRM.
4. Establish comprehensive SOPs for all departments with appropriate training to ensure staff compliance.
5. Elimination of redundant systems.

## FOCUS AREA 3:

### **Boldly Address Inequities in the organization and community**

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**Goal 1: Between January 2022- June 2025, UWBA will ensure staff & Board have obtained and maintain baseline knowledge, awareness, and skills on DEI and anti-racism competencies.**

***Strategies:***

1. Implement required DEI education and training on UWBA DEI commitments during onboarding and for leaders in order to access and maintain role.
2. Implement required team training for staff on unpacking and applying anti-racism principles.
3. Implement required DEI education and training on UWBA DEI commitments for board/advisory council, including but not limited to DEI education and training during an orientation process to the Board/Council.

***Metrics: How would we know when the goal has been accomplished?***

1. Number of training & educational opportunities provided for new staff or staff in new roles.
  2. Number of trainings for staff on applying anti-racism principles.
  3. Number of trainings & educational opportunities provided for Board/Advisory Council.
  4. Assess application of anti-racism principles in climate survey, performance management (ADP).
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**Goal 2: Between January 2022- June 2025, UWBA will 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.**

***Strategies:***

1. Add DEI commitments to jobs ads for staff positions and to board member recruitment.
2. Develop equity minded screening and interview questions with clear criteria for selection.
3. Job search teams are diversified.
4. Job search teams are trained on implicit bias and anti-racism practices (e.g., creating diverse job search teams) in search processes and how to network job ads, with access to tools and resources.
5. Hiring pool data is tracked by race.
6. Create a DEI leadership-level role with necessary supports and collaborators to lead DEI/anti-racism work for UWBA.

***Metrics: How would we know when the goal has been accomplished?***

1. Job ads and board recruitment notifications include DEI commitments.
2. Screening, interview questions and criteria are equity focused.
3. Number of job search teams trained.
4. Demographic make-up of job search team.
5. Assess the impact of de-biasing the search process (e.g., by blinding institutional affiliation) to ensure diversity of our candidate pool and hired candidates.
6. DEI role is filled on Leadership Team and actively supporting DEI/anti-racism work.

**Goal 3: Between January 2022- June 2025, UWBA will 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.**

***Strategies:***

1. Identify and mitigate ways in which UWBA has and continues to perpetuate anti-blackness.
2. Develop an internal system for responding to equity issues when they arise made up of cross-departmental and board representation from the organization.
3. Align communications across the organization with UWBA's stated DEI goals.
4. Develop and implement UWBA gift acceptance and grantor/grantee partnership policies in alignment with our values and mission on equity issues.



***Metrics: How would we know when the goal has been accomplished?***

1. Report that identifies issues and an action plan that recommends mitigation strategies for how UWBA perpetuates anti-blackness.
  2. Internal system for responding to equity issues is utilized and has a high approval rate.
  3. 100% of UWBA's donors are made aware of our new gift acceptance policy.
  4. 100% of UWBA grant agreements include our new partnership policies.
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**Goal 4: Between January 2022- June 2025, UWBA will certify that leadership act on and regularly communicate about the state of DEI at UWBA, including their individual and organizational learnings, and actions.**

***Strategies:***

1. CEO, Leadership Team and DEI council coordinate tracking and reporting on progress on DEI goals in the strategic plan.
2. Incorporate DEI goals into an employee responsibility matrix.
3. Develop a guiding document and professional education for communicating and messaging about race and intersecting aspects of identity in marketing and communications.
4. Develop annual DEI reports for UWBA for internal and external use.

***Metrics: How would we know when the goal has been accomplished?***

1. Establish action plan to guide DEI work that include clear and measurable goals and help inform how actions will lead to outcomes.
2. Communication and messaging document is created and used.
3. Annual DEI Report including action plan that identifies and recommends mitigation strategies for how UWBA perpetuates anti-blackness.