



**UNITED WAY**  
Santa Cruz County

# STRATEGIC PLAN

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July 2025 - June 2028



# CEO MESSAGE



As CEO of United Way Santa Cruz County, I am honored to share our new three-year Strategic Plan for 2025–2028. This plan comes at a pivotal time for our organization and our community. Developed in close partnership with our dedicated Board Members and staff, it serves as a clear roadmap to guide us through challenges while staying true to our mission: to ignite our community to give, advocate, and volunteer so that our youth succeed in school and life, our residents are healthy in body and mind, and our families are financially independent.

Grounded in the United Way Thriving United framework, this plan aligns our local priorities with United Way's national focus areas and success factors to ensure equitable access, community resilience, and lasting impact. Importantly, it was shaped by insights from our United Way Worldwide Thriving United Way Self-Assessment, conducted every three years, which identified key priorities to strengthen our effectiveness and accountability.

The result is a plan that is both visionary and actionable—rooted in community input, built for measurable impact, and designed to adapt. We are committed to revisiting and refining it annually, aligning updates to our ongoing assessment cycle to ensure we remain responsive to the evolving needs of Santa Cruz County. Thank you for being part of this journey with us.

**Yvette Lopez Brooks**



# SHARED VALUES



Dignity



Integrity



Empowerment



Inclusion

# OPERATING PRINCIPLES

Culture

Transparency

Sustainable Results

Collaboration & Community

Be Bold, Fail Forward



**UNITED WAY**  
Santa Cruz County



# NORTH STAR FOR YOUTH WELL-BEING

## WHAT CORE IMPACT DO WE WANT TO HAVE IN 10 YEARS ON **YOUTH WELLBEING**?

- **Access**: Ensuring what is needed for youth wellbeing is available and accessible
- **Voice**: Youth voice is represented in decision making and policy that impact them
- **Agency**: Support youth to build capacity to effect change for themselves
- **Leadership**: Create opportunities for youth to lead change
- **Connection**: Build a culture where youth are valued and supported by the community and youth value the community and want to be involved





# OUR VISION



We unite Santa Cruz County, where everyone can **thrive**, driving impact with *bold collaboration*, *shared purpose* and the *power of collective action*.





# STRATEGIC FOCUS AREAS



Community Leadership  
UNITED4YOUTH | UNITED4COMMUNITY



Brand Strength, Awareness & Relevance



Diversified Funding



Strong Organization Foundation



UNITED WAY  
Santa Cruz County



# STRATEGIC PLAN YEAR 1 (2025-2026): FOCUS AREAS



## Community Leadership: United4Youth

**Objective 1a.1:** Expand United for Youth as UWSCC’s flagship initiative, emphasizing youth leadership, mental health access, and community resilience.

**Objective 1a.2:** Leverage UWSCC’s credibility to lead and influence youth-centered policy and systems change.

**Objective 1a.3:** Build partnerships that empower young people as co-creators of equitable solutions in their communities.



## Community Leadership: United4Community

**Objective 1b.1:** Define and strengthen UWSCC’s role as a long-term, trusted partner and advocate across sectors and communities.

**Objective 1b.2:** Deepen cross-sector collaboration, with a focus on integrated services in housing, mental health, nutrition, and family support.

**Objective 1b.3:** Advance equitable policy advocacy and ensure meaningful inclusion of South County voices and partners.



## Brand Strength, Awareness & Relevance

**Objective 2.1:** Develop and implement clear, local messaging that reflects UWSCC’s purpose, values, and impact.

**Objective 2.2:** Clarify UWSCC’s role in partnerships and fiscal sponsorships to support alignment, accountability, and relevance.

**Objective 2.3:** Maintain a focused geographic scope and reinforce the vocational and equity-driven elements of core programs.



## Diversified Funding

**Objective 3.1:** Establish sustainable funding streams that reduce dependence on workplace campaigns.

**Objective 3.2:** Grow major donor and unrestricted revenue to enhance long-term impact.

**Objective 3.3:** Coordinate with funders to streamline resources and strengthen collective investment in community priorities.



## Strong Organizational Foundation

**Objective 4.1:** Operationalize the CEO’s vision with inclusive governance, staff leadership, and a strong internal culture.

**Objective 4.2:** Build a high-performing Board through structured onboarding, role clarity, and meaningful engagement.

**Objective 4.3:** Align systems, policies, and decision-making with community needs, data, and fiscal partnership clarity.





# FOCUS AREA: 1A. COMMUNITY LEADERSHIP

UNITED4YOUTH



## Objectives

**Objective 1a.1:** Expand United for Youth as UWSCC's flagship initiative, emphasizing youth leadership, mental health access, and community resilience.

**Objective 1a.2:** Leverage UWSCC's credibility to lead and influence youth-centered policy and systems change.

**Objective 1a.3:** Build partnerships that empower young people as co-creators of equitable solutions in their communities.

### *Thriving UW Framework Success Factors:*

- Listen to and Engage the Community in Creating Solutions and Shared Ownership.
- Drive and Participate in Multi-Sector Collaboration to Solve Local Problems.
- Build Local Reputation Through Partnerships that Leverage United Way Expertise.
- Lead with a Growth Mindset, Inspire Innovation and Monitor Emerging Trends.

## Year 1 Actions

- **Establish the United4Youth Committee** with clear terms of reference; ensure at least two youth members have voting roles on the United Way Board.
- **Co-create an Internal Operations Manual** for United4Youth, including goals, roles, budget outline, and a program evaluation framework aligned to UW Worldwide's recommended best practices.
- **Integrate Youth Voice** into United Way's overall strategy by holding at least two formal Youth Listening Sessions to inform planning and programming.
- **Produce a Youth Impact Report** as part of the Annual Report, showcasing progress on mental health access, leadership opportunities, and community resilience.
- **Rebrand United4Youth Materials** to ensure consistent, youth-friendly messaging that reinforces United Way's mission and local impact.





# FOCUS AREA: 1A. COMMUNITY LEADERSHIP

UNITED4COMMUNITY



## Objectives

**Objective 1b.1:** Define and strengthen UWSCC's role as a long-term, trusted partner and advocate across sectors and communities.

**Objective 1b.2:** Deepen cross-sector collaboration, with a focus on integrated services in housing, mental health, nutrition, and family support.

**Objective 1b.3:** Advance equitable policy advocacy and ensure meaningful inclusion of South County voices and partners.

## *Thriving UW Framework Success Factors:*

- Listen to and Engage the Community in Creating Solutions and Shared Ownership.
- Drive and Participate in Multi-Sector Collaboration to Solve Local Problems.
- Build Local Reputation Through Partnerships that Leverage United Way Expertise.
- Lead with a Growth Mindset, Inspire Innovation and Monitor Emerging Trends.

## Year 1 Actions

- **Conduct a Countywide Partner Listening Tour** with a published schedule; share a summary report with partners and Board to inform strategy.
- **Develop and Launch the United4Community Operations Manual**, detailing protocols for partner engagement, 211 program coordination, and evaluation methods.
- **Strengthen Cross-Sector Collaboration** by connecting 211 data insights to United4Youth and other priority areas; create an internal quarterly briefing to share these insights.
- **Expand 211 Visibility** through a multi-channel marketing campaign, including social media, local press, and a dedicated "211 Day" event in February.
- **Create Accessible Resource Guides** (printable and digital) for all service categories, ensuring consistency and easy public access.





# FOCUS AREA: 2. BRAND STRENGTH, AWARENESS, & RELEVANCE



## Objectives

**Objective 2.1:** Develop and implement clear, local messaging that reflects UWSCC's purpose, values, and impact.

**Objective 2.2:** Clarify UWSCC's role in partnerships and fiscal sponsorships to support alignment, accountability, and relevance.

**Objective 2.3:** Maintain a focused geographic scope and reinforce the vocational and equity-driven elements of core programs.

## *Thriving UW Framework Success Factors:*

- Leverage United Way Brand Assets to Build a Strong Reputation Across Local Audiences and Channels.
- Communicate Impact Results to Demonstrate Value and Drive Engagement.
- Engage the Community Through Consistent and Proactive Marketing and Communications.
- Understand the Public Sector, Philanthropic, and Social Landscapes to Leverage Trends and Opportunities./

## Year 1 Actions

- **Develop and Implement a Comprehensive Brand Guide** for all staff and partners, ensuring consistent local messaging and United Way alignment.
- **Launch a United Way Santa Cruz County Commercial** with a clear, community-centered message.
- **Establish an Organization-Wide Annual Events Calendar** to coordinate participation and increase local visibility.
- **Create and Maintain a Social Media Content Calendar**, including scheduled posts, campaigns, and collaborations (e.g., with Youth Action Network's Instagram).
- **Distribute a Monthly United Way Newsletter** with focused stories on local impact, partner highlights, and calls to action





# FOCUS AREA: 3. DIVERSIFIED FUNDING



## Objectives

**Objective 3.1:** Establish sustainable funding streams that reduce dependence on workplace campaigns.

**Objective 3.2:** Grow major donor and unrestricted revenue to enhance long-term impact.

**Objective 3.3:** Coordinate with funders to streamline resources and strengthen collective investment in community priorities.

## *Thriving UW Framework Success Factors:*

- Engage Staff and Volunteers in Fundraising Strategies.
- Implement Year-Round Donor Engagement and Sustainable Fundraising Best Practices for Individual and Corporate Donors.
- Activate Diverse, Sustainable Revenue Streams.
- Leverage Community Impact Success to Amplify Diverse Fundraising Efforts.

## Year 1 Actions

- **Increase New Sponsorships** by securing at least six new corporate partners, with a focus on companies offering matching or special giving months.
- **Develop a Unified Sponsorship Guide** to streamline asks across programs and initiatives.
- **Develop various options** for how companies may participate in workplace campaigns
- **Rebuild the Grant Tracking System**, ensuring real-time updates and quarterly reviews with leadership to maintain a clear funding pipeline.
- **Expand Board Fundraising Engagement** by creating a Board-specific advocacy and events calendar, with clear expectations for donor cultivation.
- **Leverage United Way Worldwide** resources to implement best practices for sustainable, diverse revenue streams
- **Produce a Development & Marketing Manual** that outlines year-round donor stewardship plans, workplace campaign timelines, and evaluation metrics.





# FOCUS AREA: 4. STRONG ORGANIZATIONAL FOUNDATION

## Objectives

**Objective 4.1:** Operationalize the CEO's vision with inclusive governance, staff leadership, and a strong internal culture.

**Objective 4.2:** Build a high-performing Board through structured onboarding, role clarity, and meaningful engagement.

**Objective 4.3:** Align systems, policies, and decision-making with community needs, data, and fiscal partnership clarity.

## *Thriving UW Framework Success Factors:*

- Establish and Maintain Strong Financial Standards and Data-Informed Operational Efficiency.
- Ensure an Effective and Sustainable Governance Model.
- Board and Staff to Drive United Way Performance Using Relevant Resources and Technology.
- Build an Equitable, Agile and Forward-Thinking Culture.

## Year 1 Actions

- **Meet and Document Annual United Way Membership Requirements** to ensure compliance and accountability
- Increase Staff Development Opportunities by hosting at least two internal workshops or trainings focused on leadership, DEI, or sector best practices.
- **Host Cross-Organization Retreats** with partners like First 5 and Cradle to Career to strengthen alignment and shared strategy.
- **Formalize Cross-Department Meetings** with regular schedules and rotating leadership to improve collaboration and knowledge sharing.
- **Hire an Administrative Assistant** to support communications, streamline internal meetings, coordinate Board meetings, and manage office systems.
- **Develop and Maintain a Centralized UWSCC related Volunteer Opportunity List** for Board members to increase their engagement and community connection.





# STRATEGIC TIMELINE: YEAR 1

*(July 15, 2025-June 30, 2026)*

- Message Clarity
- Deepen United 4 Youth
- Solidify United 4 Community
- Diversify Funding
- Activate Board
- Build Organizational Foundation





# STRATEGIC TIMELINE: YEARS 2-3

*(July, 2026-June, 2028)*

- Continuation of Year 1
- Strengthen Community Partnerships
- Serve as Community Connector
- Activation in times of crisis





# STRATEGIC TIMELINE: LONG TERM

## *Beyond 3 Years*

- Increase and formalize United Way's focus on systems change & policy advocacy
- Deepen and expand United Way's presence, trust, and impact across Santa Cruz County

# ANNUAL OPERATIONAL TIMELINE

## To occur each year:

- **Regularly** - Standing agenda item (all staff & Board meetings) -progress towards strategic plan
- **April** - Annual Strategic Plan Board review & revise, including alignment with our 3-year Thriving United Way Self-Assessment cycle and Action Plan priorities(*prior to budget*)
- **May** - Annual staff work plan development (*for upcoming year*)

# NEW 3 YEAR STRATEGIC PLAN REVISION TIMELINE

## Year prior to 3 Year strategic plan

\* Strategic Plan to be revised in accordance with insights from the required United Way Worldwide Self-Assessment, ensuring our strategies remain aligned with evolving community needs and organizational maturity goals.

- **August/September 2027**- Kick of Strategic Planning process
- **June/July 2028** - Review of new Strategic Plan by Board & Staff
- **July/August 2028** - Adoption of new 3 year Strategic Plan by Board



Strategic Plan Content was developed in partnership by:

- UWSCC Board
- UWSCC Staff
- Former & Current CEOs of UWSCC-Keisha Browder and Yvette Lopez Brooks
- Impact Launch Team-Shebreh Kalantari-Johnson & Megan Joseph



**UNITED WAY**  
Santa Cruz County

*“At the core of our humanity is this notion of love. And so when I can see you as a human being and it’s not about your politics, not about what country you’re from, or your language, or how you look different than me—if we start with basic humanity and love, we can go from there.”*

*— Angela F. Williams, President and CEO, United Way Worldwide*