



UNITED WAY OF SANTA BARBARA COUNTY

# STRATEGIC PLAN 2021-2023

**For nearly a century,  
United Way of Santa Barbara  
County (UWSBC) has been a  
key leader in local efforts to  
empower children, families,  
and communities.**

In recent years, UWSBC has intentionally grown its impact in communities by developing and leading programs and community partnerships that address critical local needs, especially the challenges faced by many children and families living in poverty.

Our leadership in the areas of kindergarten readiness, academic achievement, and financial empowerment clearly demonstrate UWSBC's active and strategic expansion over the past decade.

Growth in programs and partnerships has led UWSBC to shift significantly from being an organization that was, for many years, focused almost exclusively on raising and distributing funds to support worthy causes. Today, we have successfully diversified our approach. We have expanded our impacts and our model for leadership—uniting and strengthening communities behind common goals, strategies, and outcomes—each year achieving significant, measurable results.

This Strategic Plan has been developed at a time of unprecedented challenge and hardship in our community and beyond. The COVID-19 pandemic has devastated our local economy and thrown thousands of Santa Barbara County residents into crisis. The health and economic crises in which we all find ourselves today impact low-income residents the hardest, making UWSBC's existing programs and leadership more important than ever.

UWSBC has very deliberately grown its capacity to lead and unite communities through multiple periods of crisis and in support of far-reaching disaster response and recovery efforts.

Given our success in these areas and recognizing that the important needs described above remain critical, this three-year Strategic Plan focuses UWSBC most particularly on preparing children for academic success, empowering families to be financially stable, and leading efforts that help our local communities recover in times of crisis.

In all of our work, our core approach and organizational philosophy are guided by our belief in the power and effectiveness of partnerships. We are more successful and can be more impactful when we unite in our work together.

**Please join us.**

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## Executive Summary

This three-year Strategic Plan defines the issues that guide United Way of Santa Barbara County's (UWSBC) work, our programmatic focus areas and organizational goals, and the core approach we will take in our efforts to unite communities through the power of partnership in support of children and families in Santa Barbara County. Issues relating to educational success for children, poverty, meeting basic needs and access to social services have defined UWSBC's work for many years. The COVID-19 pandemic demonstrates the importance of that focus and deepens our commitment to it, helping to inform our Mission and Vision:

**Mission:** To enrich the lives of children and families and build resilient communities by leading local programs and partnerships that improve school readiness and academic achievement, financial empowerment, and crisis response and recovery.

**Vision:** Strong local communities where committed networks of leaders and organizations are united to provide children and families the education, financial skills, and resources necessary to be successful today and resilient in times of community crisis.



## Programmatic Focus Areas

Over the past 20 years, UWSBC has become a well-established leader of substantial, ongoing and impactful local programs and partnerships that achieve concrete and measurable results.

This Strategic Plan recognizes that UWSBC's proven programs supporting the educational success of children and the financial strength of families have never been more important. Through this plan, UWSBC renews its decades-long commitment to this work through two programmatic focus areas – **School Readiness and Academic Achievement, and Financial Empowerment.**

Additionally, this plan recognizes that in recent years UWSBC has developed programs and strategies that have become important components of Santa Barbara County's disaster response and recovery infrastructure. The plan commits UWSBC to continue this work in the coming years through a new programmatic focus area – **Response and Recovery in Times of Community Crisis.**

## Organizational Objectives

To ensure UWSBC's continued commitment to being a dynamic, accountable, fiscally strong, and impactful organization, the plan identifies organizational objectives upon which we will focus in the years ahead: **enhance communications and branding; maintain financial strength and expand and diversify revenue streams; leverage board strengths and increase board diversity; and support UWSBC's excellent management and staff.**

## Our Core Approach

At UWSBC we believe in the strength of a community united through the power of partnership. That commitment is reflected in the collaborative approaches that define our programs and outcomes. In all our work we seek to engage with and empower others to achieve results, building strong alliances with local nonprofits, government agencies, schools and school districts, businesses and industry, volunteers and donors, and other local leaders in philanthropy.

## Please join us in our work!



We hope you will consider joining UWSBC and our partners as we work to strengthen our community together. For more information, please visit [www.unitedwaysb.org](http://www.unitedwaysb.org).



## Our Mission

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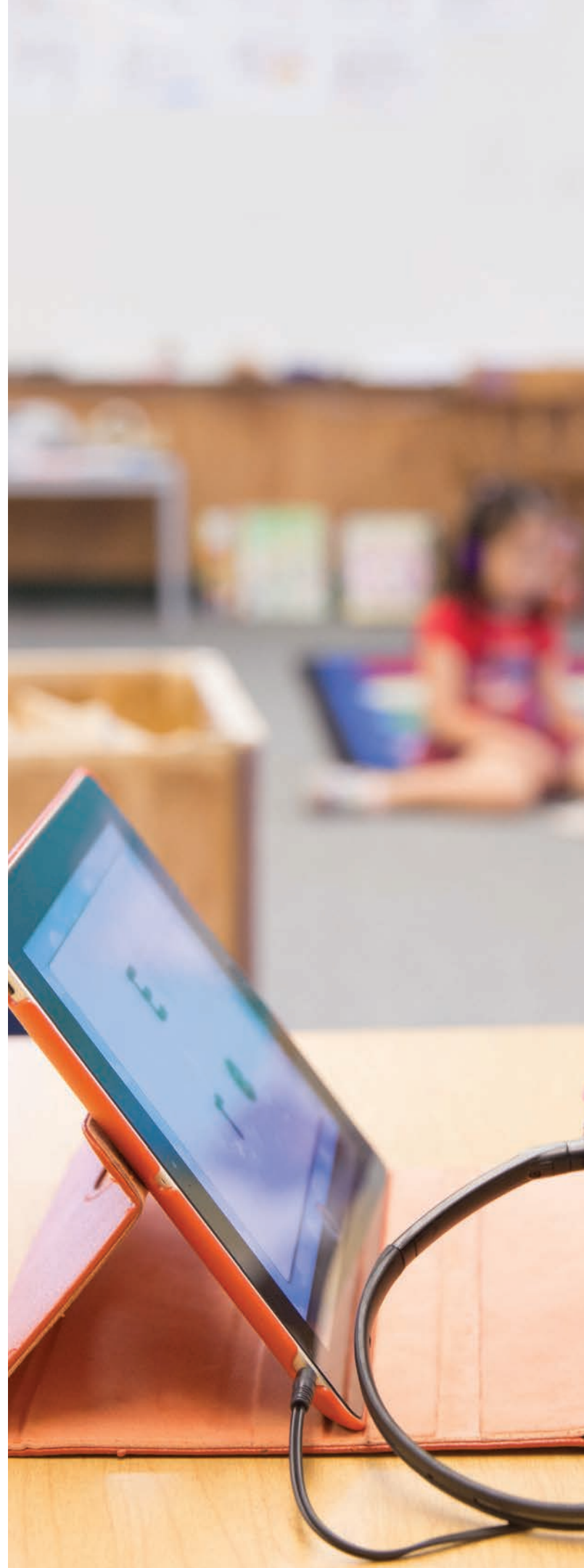
To enrich the lives of children and families and build resilient communities by leading local programs and partnerships that improve school readiness and academic achievement, financial empowerment, and crisis response and recovery.



## Our Vision

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Strong local communities where committed networks of leaders and organizations are united to provide children and families the education, financial skills, and resources necessary to be successful today and resilient in times of community crisis.





# The Issues That Define Our Work

While Santa Barbara County is often thought of as an affluent community and destination location, in reality, many local children and families live in poverty—a reality that must be addressed.

Two of Santa Barbara County's most dominant industry sectors, agriculture and tourism, rely upon a predominantly low-paid workforce serving in mainly low-paying and often seasonal jobs that keep many residents living near or below the federal poverty level of \$26,200 for a family of four. High housing costs and a severe housing shortage leave many with few options other than crowded and sub-standard living situations.

Those living in poverty in Santa Barbara County tend to be first- or second-generation immigrants; many come from limited educational backgrounds and speak English as a second language. These demographic factors (poverty, parent educational attainment, and limited English language proficiency) are key drivers of California's continuing opportunity gap and academic achievement gap between students from lower-income households and their more affluent peers who have had additional opportunities and resources in their schools and families.

## Poverty in Santa Barbara County

**24%**

of children live in families without enough resources to be financially stable (Public Policy Institute of California)

**18%**

of children live below the federal poverty rate (US Census)

**65%**

of students are eligible for the free and reduced lunch program, the measure for poverty in public education (California Department of Education)

**14%**

of students are classified as homeless under the federal definition of homelessness which includes those living doubled and tripled up in residences meant for one family (California Department of Education)



Through multiple local crises, we have witnessed the disproportionate toll such events take on lower-income residents. These communities are particularly vulnerable in times of disaster, community instability, and recession. While the COVID-19 pandemic is first and foremost a public health crisis, the prolonged shut down of our economy and the effects on many local institutions have severely impacted the financial stability of thousands of local residents. The unemployment rate in Santa Barbara County was 11.6% in June 2020—up from 4.6% in February of the same year. This economic crisis has disproportionately impacted those who struggle daily just to get by—and likely will continue for some time to come.

**It is these ongoing and emerging community dynamics—the challenges they present and the negative impacts they have in the lives of children and families—that drive UWSBC’s focus on school readiness and academic achievement, financial empowerment, and response and recovery in times of crisis and disaster.**

## Academic Challenges in Santa Barbara County



of students assessed with the Kindergarten Student Entry Profile are not “ready for kindergarten” upon enrollment (Kids Network Children’s Scorecard)



of students do not meet state standards in English/Literacy (California Department of Education—CDE)



of students do not meet state standards in Mathematics (CDE)



of students are designated as English Language Learners (CDE)

**Students from low-income families lose up to 3 months of prior academic achievement each year due to summer learning loss. By ninth grade summer learning loss accounts for up to half of the academic achievement gap between students from low-income households and their more affluent peers (Lasting Consequences of the Summer Learning Gap, Johns Hopkins University, 2007)**



# Programmatic Focus Areas and Goals

Over the next three years, UWSBC will prioritize three programmatic focus areas consistent with our newly refined mission and vision.



## School readiness and academic achievement

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## Financial empowerment

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## Response and recovery in times of community crisis

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The focus on educational success and financial empowerment continue and enhance UWSBC's ongoing work and success in these areas over the last decade. The programmatic focus on community crisis response is new and reflects UWSBC's recognized leadership in this area developed and demonstrated during recent natural disasters and the COVID-19 pandemic.

Presented on the following pages is a description of each focus area, associated programmatic objectives, and impact goals and metrics. While each element is important to success, the measurement and reporting of programmatic outcomes is critical to informing best practices, assessing programmatic strengths, and identifying opportunities for improvement.

### Supporting the Leadership of Others

In the past, one UWSBC focus area has been on health and assisting local residents gain access to affordable and quality care. Recognizing that other organizations are better suited to lead in this area than UWSBC, an outcome of this strategic planning process is to transition away from health as a programmatic focus area. In the years ahead, UWSBC will continue to integrate strategies for health access and screening in all of its programs and will look for opportunities to support the leadership of others in this important issue area.



## School Readiness and Academic Achievement

### Programmatic Objectives

UWSBC will build on its already strong record of success in school readiness and academic achievement by developing opportunities to expand our scope, impact of services, and the total number served through these specific programs. We will continue to align our programmatic models with the specific needs of local students, schools, and school districts, and we will continue to prioritize our services for children who are academically at risk. Particularly in response to the COVID-19 pandemic and the resulting changes in service delivery options, we will expand upon our already proven ability to support school districts in providing alternative models for instruction and supplemental academic supports that go beyond the regular school day.

Central to our approach is the continued engagement of community volunteers, and partners from the nonprofit, business and government sectors that help strengthen our programs. Finally, we will continue to nurture relationships with funders and philanthropic leaders to support our work and the work of our partners and schools in these critical areas.

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FOR MORE INFORMATION VISIT

[unitedwaysb.org/united-literacy](https://unitedwaysb.org/united-literacy)

### Existing Programs

- United for Literacy School Based Partnerships
  - Tools utilized and supported
    - Lexia Reading Core 5
    - Orton Gillingham curriculum
    - Reading Plus
    - Virtual Reading Summer School
- Kindergarten Success Institutes
- Fun in the Sun Summer Learning Program
- United Learning Centers
- Dolly Parton's Imagination Library

### Impact Goals

- A** Increase school readiness among pre-school students through our school readiness programs.
- B** Achieve measurable improvement in reading level/competency among school-aged children served.
- C** Achieve measurable improvement in the areas of positive identity, self-control, and family and community perceptions among students served.
- D** Increase the number of schools participating in United for Literacy School-Based Programs.
- E** Expand Fun in the Sun to underserved communities with support from schools, school districts, and funders.
- F** Expand the United Learning Center model beyond its start-up phase to serve more school sites.
- G** Expand the number of businesses, nonprofits, philanthropic leaders, and community volunteers who regularly support programs in this focus area.
- H** Continuously engage partners, community members, and stakeholders to assess the educational needs of the community and respond accordingly through programs and partnerships.



Kindergarten Success Institutes improve classroom skills for low-income 4 to 6-year-olds who have little or no prior early educational experience.

The Volunteer Income Tax Assistance program provides free tax preparation support to individuals and families in Santa Barbara County. Tax returns are prepared and completed by IRS-certified volunteers each year from February through April. This annual program and others on average provide 3,000 residents with financial literacy education and access to emergency savings accounts, college savings plans, and retirement accounts.



**Publication 505**  
Cat. No. 15569A

**Tax Withholding and Estimated**

**SCHEDULE D (Form 1040)**

Department of the Treasury  
Internal Revenue Service

**2018**  
Adjusted gross income tax year

**Capital Gains and Losses**

▶ Attach to Form 1040 or Form 1040NR.  
▶ Go to [www.irs.gov/ScheduleD](http://www.irs.gov/ScheduleD) for instructions and the latest information.  
▶ Use Form 8949 to list your transactions for lines 1a, 2, 3, 6b, 9, and 10.

Your social security number

Part I Short-Term Capital Gains and Losses—Generally Assets Held One Year or Less (See instructions)		(a) Proceeds (sales price)	(b) Cost (or other basis)	(c) Gain or (loss) (Subtract column (b) from column (a) and combine the result with column (g))
1a Totals for all short-term transactions reported on the 1099-B for which basis was reported to the IRS and for which you have no adjustments (see instructions). However, if you choose to report all these transactions on Form 8949, leave this line blank and go to line 1b.				
1b Totals for all transactions reported on Form(s) 8949 with Box A checked				
2 Totals for all transactions reported on Form(s) 8949 with Box B checked				
3 Totals for all transactions reported on Form(s) 8949 with Box C checked				
4 Short-term gain from Form 6252 and short-term gain or (loss) from Forms 4684, 6781, and 8824 (Subtract (b) from (a))				
5 Short-term capital loss carryover. Enter the amount, if any, from line 6 of your Capital Loss Carryover Worksheet in the instructions.				
6 <b>Net short-term capital gain or (loss).</b> Combine lines 1a through 6 in column (c). If you have any long-term capital gains or (losses), go to Part II on the back.				

Part II Long-Term Capital Gains and Losses—Generally Assets Held More Than One Year (See instructions)		(a) Proceeds (sales price)	(b) Cost (or other basis)	(c) Gain or (loss) (Subtract column (b) from column (a) and combine the result with column (g))
7a Totals for all long-term transactions reported on the 1099-B for which basis was reported to the IRS and for which you have no adjustments (see instructions). However, if you choose to report all these transactions on Form 8949, leave this line blank and go to line 7b.				
7b Totals for all transactions reported on Form(s) 8949 with Box A checked				
8 Totals for all transactions reported on Form(s) 8949 with Box B checked				
9 Totals for all transactions reported on Form(s) 8949 with Box C checked				
10 Long-term gain from Form 6252 and long-term gain or (loss) from Forms 4684, 6781, and 8824 (Subtract (b) from (a))				
11 Long-term capital loss carryover. Enter the amount, if any, from line 12 of your Capital Loss Carryover Worksheet in the instructions.				
12 <b>Net long-term capital gain or (loss).</b> Combine lines 7a through 11 in column (c). Then go to Part III on the back.				



## Financial Empowerment

### Programmatic Objectives

For many years, empowering local low-income residents with financial skills and literacy has been among UWSBC's core programmatic objectives. Through this Strategic Plan, the Board of Directors and UWSBC leadership are committing to more deliberately define and expand this focus area's strategic scope and desired impacts. This will include: assessing community needs in the area of financial empowerment, building upon the strengths of existing programs, identifying and engaging partners and funders, and working in collaboration to deliver concrete and coordinated financial empowerment services for those in need throughout Santa Barbara County.

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FOR MORE INFORMATION VISIT  
[unitedwaysb.org/income](https://unitedwaysb.org/income)

### Existing Programs

- Volunteer Income Tax Assistance (VITA)
- Financial Literacy Education

### Impact Goals

- A** Clearly identify how financial empowerment programming is currently integrated into UWSBC's existing programs and map out ways to bring more rigor, structure, depth of service and impact into those offerings.
- B** Grow the scope and rigor of the VITA program, specifically in the area of helping those served to become more financially aware and able to understand, complete, and potentially file their taxes on their own in the future.
- C** Assess the need for financial literacy educational programming for both children and parents. Identify local stakeholders already involved in this field, particularly those involved in the banking and finance industry, and explore partnerships.
- D** Engage partners in the private sector, relevant nonprofit organizations, schools, and school districts to develop collaborative approaches to providing well-designed financial empowerment programs.
- E** Identify concrete goals and measurable outcomes in this focus area to assess scope of services and specific programmatic impacts.
- F** Once goals and outcomes are established or refined, track performance and establish impact metrics.



# Response and Recovery in Times of Community Crisis

## Programmatic Objectives

Through multiple recent community crises, UWSBC has become a recognized leader in disaster response and recovery across Santa Barbara County. This role has filled an urgent immediate need in the community and is critical to fostering long-term community resilience. UWSBC has therefore chosen to prioritize response and recovery in times of community crisis by adding this programmatic focus area to our work. This strategic decision will allow for the immediate deployment of partnerships, programming, and effective responses whenever the need arises.

Our experiences have led to robust models and lasting collaborative, communitywide responses; first through the Thomas Fire in 2017, then in response to the devastating Montecito Debris Flow in 2018, and now as we lead and coordinate response efforts and deliver concrete benefits to local residents impacted by the global COVID-19 pandemic.

UWSBC will work to formalize the organization's many roles that have organically evolved into partnerships with leaders in philanthropy, government, schools and school districts, and the nonprofit sector. Our goals are to establish clear strategies and objectives that will allow us to build and expand response and recovery operations during this current crisis, while also maintaining the capacity and funding UWSBC needs to be prepared to play these critical roles in the long-term.

## Existing Programs

- Rapid Response, Individual Assistance Grants
- Supporting and leading philanthropy in collaborative, recovery focused grantmaking
- Creating and leading multi-sector collaborative recovery efforts
- Maintaining and adapting UWSBC programs to ensure continuity of ongoing community impacts

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FOR MORE INFORMATION VISIT

[unitedwaysb.org/covid19](https://unitedwaysb.org/covid19)



## Impact Goals

- A** Define and refine the strategies UWSBC has developed in the area of disaster response and recovery so the Board of Directors, staff, and the organization as a whole are better able to support and sustain that work through programmatic models that can be quickly activated in times of need, and supported in the long-term.
- B** Develop long-term agreements with local governments, leaders in philanthropy, and relevant nonprofit organizations to formalize relationships, programs, and strategies to be led by UWSBC during times of crisis.
- C** Proactively raise the funding necessary to support disaster response and recovery programs in the long-term so UWSBC is ready and able to act immediately whenever a crisis strikes, and to maintain recovery work for as long as is necessary.
- D** Formalize a business model and financial plan for work in this focus area that:
  - minimizes the degree to which UWSBC is distracted from its other core programming because of a need to respond to a rapidly emerging crisis, and
  - more clearly defines the factors UWSBC should consider in deciding whether to pursue a new strategy or collaboration in response to a community crisis/disaster.
- E** Increase community awareness about UWSBC's roles in this area, so as to educate the community on where people can turn if they're in need of recovery or response assistance and to make clear to potential partners and funders how they can step up and help.



In response to the Thomas Fire and Debris Flow, UWSBC created a disaster relief Cash Assistance Grants Program for individuals who were negatively and economically impacted. In that year, more than \$1,144,000 was provided to local residents in need.

That program was the foundation upon which ongoing disaster relief cash assistance grants are now being distributed by UWSBC in response to the COVID-19 pandemic. As of March 2021, more than \$1.9 million has been distributed to 2,500+ local residents. In addition to cash assistance grants, UWSBC has brought multiple partners, government agencies, and funders together to raise and manage total of \$26 million to support a variety of rapid response and recovery efforts including learning and child care services for at-risk students and essential workers, a Public Health Critical Needs Fund to support contact tracing and quarantine efforts, rental assistance program with the County of Santa Barbara and municipalities, and school supplies and supportive services to help students continue their education during the pandemic.

# Organizational Goals

Over the duration of this three-year Strategic Plan, UWSBC will focus internally to strengthen its capacity to reach four key Organizational Goals. Throughout the strategic planning process, input from the Board, management, and staff pointed to these four areas as having the most potential for UWSBC to build on its strengths and to seize upon opportunities in ways that will ensure UWSBC remains a dynamic, professional, financially strong, and impactful leader in our community now and in the future.

- 1 Enhance Communications and Branding**
- 2 Maintain Financial Strength and Expand and Diversify Revenue Streams**
- 3 Leverage Board Strengths and Increase Board Diversity**
- 4 Support UWSBC's Excellent Management and Staff**





# 1

## Enhance Communications and Branding

United Way of Santa Barbara County benefits greatly from its affiliation with the globally recognized United Way Worldwide—both in terms of brand recognition and legacy. However, UWSBC is less well known as a leader and provider of powerful and impactful local programs. In this context, some residents of the communities we serve are not aware of the critical leadership role UWSBC plays in bringing people, organizations, and resources together to address Santa Barbara County needs, as well as our expertise and experience in building and delivering both targeted programs and broader community initiatives. By effectively communicating who we are, what we do, and how we do it, our communities will be better able to join us as partners and supporters, thereby increasing our positive effects in the lives of local residents.

### Goals

- Build upon and expand UWSBC's comprehensive strategic communications and marketing plan.
- Update messaging and branding to tell the UWSBC story in a compelling, informative, and engaging manner.
- Refine and update the mix of electronic and other media, communication materials, and communication channels to strategically target stakeholders and existing and potential partners.
- Grow the organization's internal marketing and communications capacity among UWSBC's team and its affiliated contractors.
- Ensure consistent and regular communications from management and staff to Board members and key supporters so that those leaders and stakeholders can better advocate for and promote UWSBC and its work.
- Engage the Marketing & Communications Committee to help foster creative approaches.





## Maintain Financial Strength and Expand and Diversify Revenue Streams

As described in previous sections, in recent years UWSBC has successfully moved from being primarily a fundraising organization to one that is leading impactful programs and strategies that meet critical needs within our communities. Much of this success can be credited to UWSBC's strong financial management over many years. Key areas of accomplishment in this area include the development of an endowment to support operations, expanded relationships with key partners and donors, and our ongoing commitment to strong internal systems for reporting and accountability. We have built relationships with local philanthropic foundations and grown the number of individual donors who contribute their time and financial donations in support of UWSBC programs. We have seen great success in developing programs and strategies with partners such as schools and school districts, government agencies, and sister nonprofit organizations that coinvest with us to maximize programmatic impact. We have also continued to engage leaders and employers in the private sector as donors, volunteers, and advocates for broader efforts to address pressing community needs. Our ongoing commitment to strong fiscal systems and diverse strategies for revenue generation will continue to enhance UWSBC's financial position and impacts in the future.

### Goals

- Revise and update UWSBC's existing Revenue Plan.
- Increase partnerships with school districts, municipal governments, and nonprofits that enable co-funding models.
- Build on the successes of Women United and the Young Leaders Society.
- Develop and implement strategies to increase connections between UWSBC programs and local employers in order to increase excitement and buy-in during workplace campaigns.
- Expand and nurture relationships with philanthropic foundations.
- Develop a service expansion plan that delineates criteria for consideration when vetting new programmatic opportunities in all focus areas.
- Proactively identify, secure, and maintain funding in reserve that can be used to support UWSBC's expeditious response and recovery in times of community crisis.
- Ensure that Board members and key organizational stakeholders are properly engaged to be effective advocates for UWSBC and its programs with potential funders.

# 3

## Leverage Board Strengths and Increase Board Diversity

Over many years, UWSBC has actively recruited and retained a strong and committed Board of Directors with expertise, knowledge, experience, and connections in the community that have served the organization exceedingly well during what has been a critical time of internal evolution and growth and external change. Under the current Board's leadership, UWSBC has successfully transitioned executive staff and Board leadership, undertaken a major shift in organizational and programmatic focus, and taken on a more significant role leading the immediate response to highly complex and critical community crises that are both ongoing and emergent. To achieve the aggressive goals set in this Strategic Plan and to meet the increasingly difficult challenges our communities face, UWSBC must leverage the Board's strengths while also bringing more diversity to its membership.



### Goals

- Identify specific competencies and areas of expertise that would be most beneficial and/or needed to support UWSBC's success in the future.
- Ensure diversity of Board membership, including attributes such as expertise and experience, ethnicity, cultural competency, gender, and age.
- Build on successful models for increasing diversity that already exist within UWSBC, such as Women United and the Young Leaders Society, and strategically leverage those groups of supporters to nurture future Board members.
- Engage representatives from businesses, organizations, and government agencies that are already connected directly in UWSBC's work.
- Increase the number of members serving on the Board, as is allowed under current bylaws, to ensure diversity of input, creativity, expertise, and connections within the communities we serve.
- Establish clear expectations for Board involvement/ service, and meaningful engagement of Board members.

# 4

## Support UWSBC's Excellent Management and Staff

The UWSBC Board is deeply appreciative of the excellent management team that currently leads the organization as well as their respective teams who make UWSBC's work and community impacts possible. As has been described in previous sections, the organization has effectively navigated numerous and significant internal changes and transitions in recent years. At the same time, our communities have experienced tremendous upheaval in the face of multiple disasters and crises. It is not by luck that UWSBC has emerged from all of this strongly positioned to lead and deliver much needed benefits to our communities. The Board and management team remain committed to supporting the continued growth, development, and success of our staff in the years ahead, especially with an eye toward maintaining organizational capacity and ensuring that appropriate staff resources are available to meet the goals set out in this Strategic Plan. Finally, the Board of Directors recognizes and is committed to its role in empowering and supporting the President & CEO to oversee and manage the staff and the organization.



### Goals

- Under the leadership of the President and CEO, conduct an organizational assessment of the current allocation of staff resources and develop a workforce/workflow effectiveness plan to achieve optimal functioning.
- Ensure adequate resources based upon the workforce/workflow effectiveness assessment and financial plan.
  - Invest in the professional development of the staff at both the individual and team levels to foster increased professional fulfillment as well as organizational and staff success.
  - Increase opportunities for cross departmental collaboration, learning, and creativity.



## Actively Engaged with Our Community

### Creating Innovative Solutions for Rapid Response in Times of Community Crisis

At the peak of the COVID-19 pandemic, the Santa Barbara County Public Health Department needed help rapidly expanding its contact tracing program to help stop the spread of the virus. UWSBC led the creation of a public-private partnership, enlisting the support of funders and engaging the Family Service Agency of Santa Barbara County to devote up to 30 culturally competent employees to become trained and deployed into contact-tracing efforts.



### Connecting Local Professionals to Support Student Learning and Career Exploration

Each year through UWSBC's Fun in the Sun Summer Enrichment Program, 600 volunteers representing professional fields such as science, technology, engineering, and others work directly with students on projects and activities providing direct experience in valuable career areas. Local employers' support is critical to the experiential learning strategy of the Fun in the Sun program which seeks to address summer learning loss among students who struggle academically.







## Demonstrating Community Leadership to Address Complex Challenges

Recognizing the importance of kindergarten readiness and the challenges many students face in achieving academic success, UWSBC volunteers launched Women United, a group of more than 100 women community leaders, volunteers, and donors focused on helping children be ready for kindergarten and successful in school.



## Deploying Volunteer Power to Strengthen Our Community

Through UWSBC's Day of Caring, roughly 1,000 volunteers devote their Saturday to 50+ community improvement projects throughout Santa Barbara County. Each year, more than \$300,000 worth of volunteer hours are delivered into service throughout our communities.



## Engaging Businesses and Employers for Community Benefit

Through workplace/employee giving campaigns and direct corporate philanthropy, UWSBC works with local businesses and employers to recruit thousands of volunteers, engage private sector creativity, and secure charitable contributions in support of worthy community programs and services.



## Strengthening Local Communities Through the Power of Partnership

No individual or organization succeeds on their own. We are at our best as people and as communities when we work together.

In all of our work, partnership is at the heart of our approach. In each of our focus areas—school readiness and academic achievement, financial empowerment, and crisis response and recovery—achieving our vision of strong and resilient communities depends on the involvement and support of many individuals and organizations.

We strive—in all of our efforts—to unite local communities through the power of partnership, establishing committed networks of leaders and organizations working together toward our shared goals.

For nearly 100 years, UWSBC has actively and strategically worked to engage, empower, and lead in our communities. We have coordinated with diverse organizations, collaborated with partners, identified gaps, and invested resources where they would matter most.

We have built strong alliances with local nonprofits, government agencies, schools and school districts, businesses and industry, volunteers and donors, and other local leaders in philanthropy.

We have developed the capacity to lead, to coordinate multifaceted efforts, and to deliver concrete local results. We are deeply thankful that so many others have joined with us over many years to do this work.

Today we are confronted with community challenges that seem daunting and are highly complex. There exists in our communities a level of human suffering that is unprecedented and deeply concerning.

Many children and families regularly face obstacles in achieving success. Many of our neighbors regularly struggle just to get by. The impacts of the present global pandemic exacerbate these everyday challenges and are likely to continue impacting thousands of our neighbors for years to come.

The challenges are great, and there are no quick fixes. No one person or organization can successfully do it alone.

Just as we have done since 1923, we intend to do our part—to lead when our leadership is needed and to be there to support the work of others when our assistance can make a difference.

**More than ever before, our success depends on you—your help, your unique talents and abilities, your partnership.**

**Please contact us to learn more and to get involved today.**

**805-965-8591 | [info@unitedwaysb.org](mailto:info@unitedwaysb.org) | [unitedwaysb.org](https://unitedwaysb.org)**

## Board/Strategic Planning Committee Members



Cliff Lundberg,  
Board Chair and CFO  
VP Emeritus of  
Westmont College



Rick Scott,  
Immediate Past  
Board Chair  
Retired Nonprofit  
Executive



Susan Hersberger,  
Board Vice Chair  
Retired Public Affairs  
Executive



Leo Hamill,  
Board Treasurer  
Senior Vice President/  
Regional Manager  
City National Bank



Lance Connor,  
Board Member  
Reliable Engineering  
Services



Kevin Nelson,  
Board Member  
Director of Corporate  
Compliance, Cottage  
Health



Patrice Ryan,  
Board Member  
Retired Executive



Steve Ortiz,  
Board Secretary  
UWSBC President  
& CEO

## Board Members

Diane B. Doiron, CLU, Board Vice Chair  
Owner, Doiron Financial Associates

David Flattery, Board Member  
VP of Business Development,  
DuPont Displays

Robert Hollman, Board Member  
Commercial Real Estate  
Developer & Owner

Terrance Holt, Board Member  
General Partner, Red Barn Investments

Alex Koper, Board Member  
President & CEO, Global Mortgage  
Group

Terri Maus-Nisich,  
Board Member  
Assistant CEO,  
County of Santa Barbara

Art Merovick, Board Member  
Retired Executive

Rosemary Mutton,  
Board Member  
Community Volunteer/  
Women United Committee Chair

Maryan Schall, Board Member  
Community Volunteer  
& Philanthropist

## Our Excellent Staff Team

Nicole Blair  
Finance & Administration Manager

Melinda Cabrera  
Director of Strategic Partnerships

Suzanne Danielson  
Donor Relations Officer

Victoria Dominguez  
Development Executive

Carlee Finlinson,  
Executive Assistant to the CEO

Ina Frank  
Major Gifts Officer

Anna Gavin  
Community Impact Associate

Katie Higgins  
Communications  
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Shanna Wasson Taylor  
Gift Planning Services Officer

Julia West  
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## Our Strategic Planning Consultants from Romo & Associates

Ben Romo, *Founder and Principal*

Leslie McGorman, *Senior Project Manager*

Christina Ferguson, *Communications and Project Associate*

# Special Thanks

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The Board of Directors of UWSBC deeply appreciates the leadership of its members and staff who served on the Strategic Planning Committee which led the six-month process producing this Strategic Plan.

The process of developing this plan began prior to the outbreak of the COVID-19 pandemic and the Committee wisely paused to assess whether and how to proceed in the development of a plan in this new and challenging context. Upon reflection, the Committee determined that the new realities and challenges created by this crisis affecting our communities made the creation of a plan even more important. Our heartfelt appreciation goes out to the Committee, our excellent staff team, and our Board of Directors for their ongoing commitment to our mission, vision, programs, and impact in these challenging times. Special thanks as well go to the team from Romo & Associates for their facilitation and leadership during the strategic planning process.

**Please contact us to learn more  
and to get involved today.**

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