

THE UNITY COUNCIL STRATEGIC PLAN

OCTOBER 2017



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EXECUTIVE SUMMARY

Established at the height of the Civil Rights Movement, The Unity Council was a physical commitment by local leaders to advance a substantive—and not merely descriptive—representation of Latinos in political and policy decisions.

Today, The Unity Council (TUC) serves as a Social Equity Development Corporation devoted to improving the quality of life of Oakland's Fruitvale District—and like communities—through its innovative and neighborhood-focused economic equity and intergenerational pathway approach. As an anchor organization, TUC provides holistic support services to over 8,000 individuals and families annually.

Over time, TUC has invested over 100 million dollars in community assets, including major affordable housing and real estate such as the Fruitvale Transit Village—a nationally recognized transit-oriented development project.

Mission

Our mission is to promote social equity and improve quality of life by building vibrant communities where everyone can work, learn, and thrive.

Vision

We envision a joyful, united, and engaged community where people have the power to shape their lives.

Desired Impact and Outcomes | Theory of Change

The Unity Council's Theory of Change addresses the deeply rooted issues of inequitable financial investment and community development in low-income communities of color—particularly east Oakland's Fruitvale district and like communities. Children in these communities lack access to the tools and opportunities of their affluent counterparts.

Adults, navigating within a landscape of systemic oppression, struggle to achieve financial security and empowerment. Neighborhood infrastructure—the availability of affordable housing, small business supports, and economic vibrancy—often suffers because of profit-driven external actors that have no ties to the community.

The Unity Council’s desired impact for the Fruitvale and like communities

- Healthy and safe neighborhoods, where all residents have equitable access to the tools and opportunities for success
- Residents have the power to shape their lives and determine the future for their community
- Joyful, engaged, and thriving individuals, youth, and families
- A culturally thriving and diverse community, where differences are embraced and celebrated

In pursuit of this desired impact, we will strive to reach these outcomes over the next five years:

- Advance healthy, resilient neighborhood hubs where: 1) residents can afford to live in their neighborhood; 2) small businesses thrive; 3) culture is preserved and celebrated, and 4) holistic social services are available
- Deepen strong public and private partnerships with a focus on impact and long-term outcomes for the community
- Prepare children and their families for success in school, and give children and youth the supports they need to succeed in school
- Provide adults access to education and career pathways that allow them to achieve financial security
- Provide access to high quality affordable housing and information to support housing retention
- Support seniors so they remain connected, engaged and healthy

5-year Strategic Plan

There are two pillar approaches to our strategic plan that will position us to truly scale our impact and collectively take on the charge to building vibrant communities: 1) Neighborhood Hub and 2) Anchor organization approaches. Our unique approaches to serving our mission provide a platform that can support communities to work, learn, and thrive.

The Neighborhood Hub Approach focuses on promoting equitable opportunities for individuals and families in areas of education, housing, jobs and career pathways, small business development, and cultural identity. TUC looks to bridge generations, creating a continuous pathway of supports that a person may enter at any stage of life. Moreover, we recognize the need for equitable neighborhood and real estate development activities that will lead to improved quality of life outcomes.

Our Anchor Organization Approach is geared towards an investment in the effectiveness and future sustainability of TUC—strengthening our ability to fulfill our mission over time, and enhancing our ability to have a positive impact on lives and communities.

Our two approaches:

Neighborhood Hub Approach	Anchor Organization Approach
1. Intergenerational Pathways	3. Data-Informed Decision Making
2. Equitable Economic Development	4. Financial Sustainability
	5. Staff Leadership Development

Our five-year strategic plan outlines the specific goals under each of the five strategic directions identified above. Following the release of the strategic plan, we have committed to further testing of the business model and the development of an implementation plan that can be tracked and monitored by Executive Staff and Board of Directors.

HISTORY



Established at the height of the US Civil Rights Movement, The Spanish Speaking Unity Council of Alameda County—known today as The Unity Council—was a commitment by local community leaders who wanted to advance a substantive representation of Latinos in political and policy decisions in Oakland and the surrounding communities. Founded as a 501(c)(3) in 1967, the organization operated the first Spanish-language focused employment center in Oakland and served as an anchor response to President Lyndon B. Johnson’s War on Poverty.

Led by Founding Executive Director Arabella Martinez, The Unity Council grew to address the most challenging needs of the Fruitvale and East Oakland community: access to high-quality education, jobs, and services that tackled chronic poverty and unemployment in the neighborhood. The goal was to build an economically vibrant, physically attractive, and livable neighborhood where all people—regardless of race or national origin—could thrive.

TUC took on a significant business endeavor to attain and build community assets via real estate acquisition and management between the 1980s and 1990s. These business investments catapulted the organization to develop and build the nationally recognized transit-oriented development known as The Fruitvale Village. Today, it remains a vibrant public space in which people live and shop, and connects the Fruitvale to critical services and access to the greater Bay Area.

Shortly after opening the Fruitvale Transit Village in 2004, Gilda Gonzalez—a veteran in Oakland public policy and government—became the CEO of The Unity Council and led the organization through a national economic crisis. During this tumultuous time, TUC was able to expand its youth services, including the creation of the Latino Men and Boys Program. The Children and Family Services Division also grew, adding support services to teen parents and medically fragile infants.

In 2013, Chris Iglesias assumed the role of Chief Executive Officer. Challenged by financial woes, Iglesias, alongside the Board of Directors and Executive Leadership, led a transparent dialogue with corporate, philanthropic and civic leaders. This dialogue materialized into significant financial opportunity, allowing the organization to streamline operations and right-size budgets. Today, the executive leaders continue to advance a sustainable financial and programmatic model in support of The Unity Council’s Vision and Mission.

{See our History Timeline on page 22}

ABOUT US



Our Mission

The Unity Council's mission is to promote social equity and improve quality of life by building vibrant communities where everyone can work, learn, and thrive.

Our Vision

We envision a joyful, united, and engaged community where people have the power to shape their lives.

Our Values

COMMUNITY We create community with and for one another. We build on the strength that guides and nourishes our families, children, seniors, and partners to live and thrive.

EMPOWERMENT We believe people and communities have the power, skills, knowledge, and leadership to gain control over factors and decisions that shape their lives.

EQUITY We believe people have certain inalienable rights to live, work, and thrive in their neighborhood

without regard to race, income, language, or background.

INTEGRITY We are committed to living and working with honesty and transparency, and believe this builds trust with and among partners and our community.

JOY We believe in celebration, and that pleasure and happiness improve quality of life.

PASSION & SERVICE We deliver community-focused services with heart, propelling positive and lasting systemic change in our neighborhoods.

ROOTED IN CULTURE We welcome, embrace, and celebrate the beauty of our rich community diversity.

Who We Are & Where We Work

Located in the Fruitvale District of Oakland, TUC serves as an anchor organization and social equity corporation devoted to improving the quality of life in Fruitvale and like communities through its innovative and neighborhood-focused economic equity and intergenerational pathway approach. We represent the rich cultural and ethnic diversity of our communities by

offering services in five languages in our programming, staff, events and community initiatives. As a social equity development organization, TUC provides holistic support services to over 8,000 individuals and families annually, including:

- Early childhood education
- School mentorship and leadership development
- Employment services
- Career readiness training
- Housing and financial stability
- Senior citizen services
- Art & cultural events

Over time, TUC has invested over 100 million dollars in community assets, including affordable housing and community benefit developments like the Fruitvale Transit Village, a nationally recognized transit-oriented development project. Other real estate and small business assistance activities include:

- Community Resource Center at 1900 Fruitvale: community benefit office building
- Affordable Senior Apartment Homes: 188 units of senior affordable housing—Posada De Colores, Las Bougainvilleas, Casa Velasco



FRUITVALE DISTRICT STATISTICS

POPULATION

49,917, **13%** share of Oakland

HOUSEHOLDS

14,505, **9%** share of Oakland

HOUSING UNITS

15,729, **9%** share of Oakland

FAMILIES WITH CHILDREN

44% in Fruitvale, **29%** in Oakland

MEDIAN AGE

31 in Fruitvale, **37** in Oakland

PERCENTAGE OF HOUSEHOLDS LIMITED ENGLISH

27% in Fruitvale, **12%** in Oakland

PERCENTAGE OF ADULTS WITH HIGH SCHOOL EDUCATION OR LESS

66% in Fruitvale, **39%** in Oakland

PERCENTAGE OF WORKING AGE ADULTS WHO ARE EMPLOYED

56% in Fruitvale, **61%** in Oakland

INCOME PER CAPITA

\$14,700 in Fruitvale, **\$29,400** in Oakland

DENSITY PER SQUARE MILE

25 per Fruitvale, **11** per Oakland

HOUSING UNITS PER SQUARE MILE

8 per Fruitvale, **5** per Oakland

RENTER OCCUPIED

74% in Fruitvale, **64%** in Oakland

Source: ESRI Business Analyst 2013



Real estate and business development activities continued:

- Fruitvale Transit Village Phase I: Award winning transit-oriented development with over 150,000 square feet of retail, commercial and residential space
- Fruitvale Transit Village Phase II: Currently in development—275 units of affordable housing
- Public Market and Historic Masonic Temple: 11 small businesses and the planned Juntos Fruitvale—a co-working, community and cultural arts space
- High-quality property management services
- Business Improvement District management of 396 businesses
- Small business support services

The Unity Council staff are a group of dedicated, talented employees deeply committed to social equity and creating lasting, impactful change. Every year TUC employs upwards of 300 people and engages hundreds of volunteers to carry out the mission of the organization.

EMPLOYEE STATISTICS

GENDER

75% Female, **25%** Male

MINORITY

93%

LOCAL

65% live within a 5-mile radius of our two hubs of service Oakland, and Concord

AGE

14% 18-25

55% 26-50

31% 51+



CURRENT CONTEXT & ENVIRONMENT

How did we get here?

Over our 53-year history, The Unity Council—like many nonprofit organizations—has faced its share of financial and programmatic challenges. Stressful political climates, reduced funding, lack of resources and capacity, and being tasked with doing more with less—all have contributed and played a significant role in creating financial challenges over time.

Without the adequate financial resources, TUC grew organically but not always strategically. When Chris Iglesias was appointed CEO by the Board of Directors in 2013, he was tasked with the growing financial and operational challenges at hand.

Since then, Iglesias, the Board of Directors, and the Executive Leadership have streamlined efforts in Fund Development—increasing public-private partnerships that focus on supporting the current needs of the community and not burdening staff with new endeavors that do not align well with the Mission. This was an important undertaking because, for many years, TUC would take on new programs and responsibilities, straining the capacity of employees to support the community effectively. Between 2013 and 2016, TUC was focused on diversifying revenue, streamlining programs, building strong partnerships, restructuring departments, and identifying financially impactful real estate development opportunities. These actions, coupled with a conscious focus on improved staff engagement, have motivated and re-energized staff—resulting in a stronger and more resilient organization.

Moreover, in 2015, The Unity Council engaged the Nonprofit Finance Fund (NFF)—a nationally recognized lender and business consulting firm—to look at the existing business model and long-term sustainability of the organization. This rigorous journey resulted in a set of recommendations that encouraged the organization to refine its existing mission, vision, impact, and outcomes; created a theory of change that met the needs of the community today; developed a comprehensive fundraising strategy; and reinvigorated the business model. All of NFF's recommendations were unanimously adopted by the Board of Directors in July 2016, and the work of developing this 5-year strategic plan began.

In the midst of this unprecedented period in US history, The Unity Council intends to build a future for our community that is thoughtful, generous, and respectful. We intend to build a future where the power is held by the community. We will raise up and amplify those community voices. Our Mission, core values, and strategic direction will not be compromised or discouraged by the current administration's rhetoric or policy decisions. We are resolved to build a Fruitvale, Oakland and Bay Area that accepts and celebrates culture, diversity, and community. TUC will continue to exercise our power to resist any politics and policies that stand in the way of creating a community that is joyful, united, and engaged.

THE STRATEGIC ISSUES

ISSUE 1: MOVING BEYOND DISCREET PROGRAM SILOS

Over the past 53 years, The Unity Council has grown to implement a wide variety of services for children, family and individuals of all ages. Agency programs now reach people at all stages of their lives, and this comprehensive programming is seen by the community, partners, and stakeholders as outcomes-based work and a rich community asset. Because the organization is so large and varied in its services, historically there has been a lack of communication and strategy between departments and programs. This lack of connectivity led to duplicate services, lost opportunities, and reduced the overall impact of the organization. The absence of an agency strategic plan and cohesive vision led departments to be focused on grant funders and outputs. The organization sought any and all grant opportunities and then tailored programs to these specific funds rather than being data-driven and impact- and outcomes-focused. This created a challenge because grant funding streams often reward narrowly focused outputs, which are specific to programs and not to infrastructure and integration. This strained the organization's ability to build capacity and limited the ability to serve the interconnected needs of children, individuals, and families.

ISSUE 2: EQUITABLE ECONOMIC DEVELOPMENT

East Oakland's Fruitvale and like communities continue to be challenged by inequitable economic development. Facing systemic racism, entrenched poverty, and lack of opportunity—in many ways East Oakland experiences a failure to thrive. Now East Oakland communities are facing additional external factors such as skyrocketing rents and opportunistic investors that can ultimately lead to displacement.

The Unity Council works in many different capacities in equitable economic development. These capacities include social benefit Real Estate development, local small business supports, and cultural preservation.

As a leading provider of career, employment, and financial opportunities in the East Bay, we provide community access to workforce opportunities that provide a living wage. As an anchor organization for the Fruitvale, we plan to maintain the District's cultural vibrancy for its diverse and low-income people by implementing our neighborhood strategy which prioritizes equitable development, cultural preservation, and displacement prevention, and by ensuring our communities have access to the region's education and career pathways.



ISSUE 3: DATA-INFORMED DECISION MAKING

The Unity Council is adept at gathering data specific to any given program, and for that program's grant-funded goals. However, the data collected, and the platform used to collect data, is driven solely by specific funding requirements. The result: a variety of data collection software employed throughout the organization. Data collection results, while useful in discrete silos, do not encompass the full impact of the agency's work. Without funds dedicated specifically to infrastructure and system building, the organization as a whole has not been able to adopt a single platform to measure long-term impact, track clients' multiple touch points with the organization and measure the ripple effect of community investment (i.e., affordable housing and transit-oriented development). Without the use of a single, larger platform, the agency remains unable to capture the nuanced data necessary to move wholly to an outcomes-based model.

ISSUE 4: FINANCIAL SUSTAINABILITY

At various times, The Unity Council has found itself in a situation not unfamiliar to many nonprofits: a financial shortage in operating funds. TUC's funding model historically relied on various program grants that often did not provide adequate funds for key administrative departments that fuel day-to-day operations. Traditionally, TUC was able to weather the storm of insufficient operating revenue through one-time cash influxes such as revenue from property sales, one-time major gifts, or other real estate development activity. Relying on one-time funds for operating activities is not a sustainable business model.

Over the last several years, the agency has looked at every existing source of revenue and has begun the work of maximizing and diversifying wherever possible. As a result of this five-year strategic plan, the organization has committed to work with Nonprofit Finance Fund on a second business model analysis.

ISSUE 5: STAFF ENGAGEMENT AND LEADERSHIP DEVELOPMENT

Employees of community-based organizations often suffer from burnout, lack of support, and low levels of engagement. Front-line staff, who work with some of the most vulnerable people in the community, can feel emotionally stretched to provide high levels of service and care to all of their clients. This issue is compounded because community-based organizations often lack resources to provide adequate training and pay competitive wages. Finally, while many equity-minded nonprofits seek to serve a diverse array of clientele, their staff, boards, and executive leadership don't always mirror their communities.

The Unity Council believes that employees are the strongest asset of the organization. TUC staff are diverse, talented, driven to excellence, and come from the community. The employees of TUC are core to what we do and who we are. The organization has elevated our commitment to give back to our employees as one of our five strategic visions for the next five years. This organizational principle must be reflected in how we hire, whom we hire, and the support provided to every employee.

THEORY OF CHANGE

The Unity Council's Theory of Change addresses the deeply rooted issues of inequitable financial investment and community development in low-income communities of color—particularly east Oakland's Fruitvale district and like communities. Children in these communities lack access to the tools and opportunities of their affluent counterparts. Adults, navigating within a landscape of systemic oppression, struggle to achieve financial security and empowerment. Neighborhood infrastructure—the availability of affordable housing, small business supports, and economic vibrancy—often suffers because of profit-driven external actors that have no ties to the community.



Ultimate Outcomes—Desired Impact

- Healthy and safe neighborhoods, where all residents have equitable access to the tools and opportunities for success
- Residents with the power to shape their lives and determine the future for their community
- Joyful, engaged, and thriving individuals, youth, and families
- A culturally thriving and diverse community, where differences are embraced and celebrated

Long-term Outcomes

- Advance healthy, resilient neighborhood hubs where: 1) residents can afford to live in their neighborhood; 2) small businesses thrive; 3) culture is preserved and celebrated, and 4) holistic social services are available
- Further strong public and private partnerships with a focus on impact and long-term outcomes for the community
- Children and their families are prepared for school
- Children and youth have the supports they need to succeed in school
- Adults have education and career pathways that allow them to achieve financial security
- Community members have access to high-quality affordable housing
- Seniors are connected, engaged, and supported

STRATEGIC DIRECTION



5 STRATEGIES

NEIGHBORHOOD HUB APPROACH

- Intergenerational Pathway Strategy
- Equitable Economic Development

- 1 Integrate and strengthen The Unity Council's portfolio of high performing, impact oriented services.
- 2 Advance equitable economic and neighborhood development activities that lead to vibrant, healthy Neighborhood Hubs.

ANCHOR ORGANIZATION APPROACH

- Data Informed Decision Making
- Financial Sustainability
- Staff Engagement and Leadership

- 3 Develop an organizational culture and infrastructure that supports data-informed decision making resulting in increased impact and outcomes for our community.
- 4 Diversify and grow revenue streams to cover the full cost of doing business including, fair wages, operating and change capital reserves.
- 5 Foster an organizational culture of engagement, leadership, and performance, where impact is recognized, and with a workforce that represents the communities we serve.

Approach & Strategies

There are two pillar approaches and five strategies within the strategic plan that positions us to truly scale our impact and take on the charge to build a vibrant community: 1) **Neighborhood Hub** and 2) **Anchor Organization Approach**. Our unique approach to serving our Mission provides a platform that will support our community to work, learn, and thrive.

Neighborhood Hub Approach

In the growing body of research regarding the social determinants of health, there is wide recognition that a broad range of social, economic, and environmental factors shape individual and community health outcomes. Recognizing this research, The Unity Council is adopting the term "Healthy Neighborhood Hub" to define a place where people live healthy lives, feel safe, have a sense of belonging, are able to—and

want to—stay in their neighborhood, and where they can access supportive services.

Over the next five years, The Unity Council will use the "Neighborhood Hub Approach" as a framework for our work in the community.

The Neighborhood Hub approach contains two critical strategies:

1. **Intergenerational Pathway**
2. **Equitable Economic Development**

The Neighborhood Hub approach focuses on promoting equitable opportunities for individuals and families in areas of education, housing, jobs and career pathways, small business development, and cultural identity. Our Strategic Directions 1 and 2 address our desire to work toward successfully implementing this Neighborhood Hub approach for our families and communities over the next five years.

The Unity Council's **THEORY OF CHANGE** addresses the deeply rooted issues of inequitable financial investment and community development in low-income communities of color—particularly east Oakland's Fruitvale district and like communities. Children in said communities lack access to the tools and opportunities of their affluent counterparts. Adults, navigating within a landscape of systemic oppression, struggle to achieve financial security and empowerment. Neighborhood infrastructure—the availability of affordable housing, small business supports, and economic vibrancy—are victims to profit-driven external actors, without ties to the community.

LONG-TERM OUTCOMES

- Advance healthy, resilient neighborhood hubs where residents can afford to live in their neighborhood, small businesses thrive, culture is preserved and celebrated, and holistic social services are available
- Promote strong public and private partnerships with a focus on impact and long-term outcomes for the community
- Children and their families are prepared for school, children and youth have the supports they need to succeed in school
- Community members have access to high-quality, affordable housing
- Adults have education and career pathways that allow them to achieve financial security
- Seniors are connected, engaged, and supported

INPUTS

- Mission, Vision & Values
- Anchor Organization Lens
- High-Performing Talent
- Diversified Revenue
- Data Driven & Outcomes Focused
- Integrated Services
- Strategic Partners

DESIRED IMPACT

LONG-TERM OUTCOMES

STRATEGIES

INPUTS

COMMUNITY, ENGAGEMENT & LEADERSHIP

DESIRED IMPACT

Residents have the power to shape their lives and build the future for their community

A culturally thriving and diverse community, where differences are embraced and celebrated

Joyful, engaged, and thriving individuals, youth, and families

Healthy and safe neighborhoods, where all residents have equitable access to the tools and opportunities for success

STRATEGIES

- Intergenerational Pathways: Integrate and strengthen The Unity Council's portfolio of high-performing, impact-oriented services.
- Advance equitable economic and neighborhood development activities that lead to vibrant, healthy Neighborhood Hubs.
- Develop an organizational culture and infrastructure that supports data-informed decision making resulting in increased impact and outcomes for our community.
- Diversify and grow revenue streams to cover the full cost of doing business including, fair wages, operating, and change capital reserves.
- Foster an organizational culture of engagement, leadership, and performance, where impact is recognized, and with a workforce that represents the communities we serve.



1. INTERGENERATIONAL PATHWAY STRATEGY

This strategy involves meeting the community where they are on their pathway to social and economic well-being. A Neighborhood Hub is home to a variety of important social services that improve academic and health outcomes, promote community leadership and advocacy, and increase economic self-sufficiency. This strategy touches members of the community at every age and stage of life—from pregnancy through late adulthood. Creating a strategy that bridges generations provides a continuous pathway of supports that a person can access at any stage of life. Additionally, this strategy recognizes that for many of our clients, their success has a ripple effect through their families and into the community.

Key activities within this strategy fall under The Unity Council's suite of community, family, and asset-development programming:

- » Children & Family Services
- » Employment Services
- » Career Readiness Training
- » Housing & Financial Stability
- » Latino Men & Boys Program
- » Senior Services

2. EQUITABLE ECONOMIC DEVELOPMENT STRATEGY

This strategy identifies the need for equitable neighborhood and real estate development activities that will lead to improved quality of life outcomes; recognizes that where we live plays a large part in ultimate outcomes; and acknowledges that community organizations and residents are more powerful when they own, shape, and control their built environment. Shifting the ownership of real estate development to community-based nonprofits transfers power into the hands of community members.

Key activities of this strategy fall under our real estate development activities (both current and past) and our programs to assist small businesses:

- » Business Improvement District
- » Small Business Development Workshops and Training

- » Community Arts and Events (Dia de los Muertos)
- » Affordable Housing Properties
- » Fruitvale Transit Village
- » Public Market and Historic Masonic Temple

Anchor Organization Approach

As an extension of our Healthy Neighborhood Hub approach, we acknowledge that neighborhoods are stronger when they have access to a strong social equity development corporation. The second approach will lead to a strong, resilient anchor organization leading change. The anchor organization approach is internally focused, geared towards the future sustainability of the organization. This approach helps us fulfill our mission over time, thereby strengthening our ability to have a positive impact on lives and communities. The Unity Council has and will continue to provide the backbone infrastructure and advocacy to elevate and amplify the voice of the community.

The Anchor Organization Approach contains three critical strategies:

1. **Data-informed decision making**
2. **Financial sustainability**
3. **Staff engagement and leadership development**

3. DATA-INFORMED DECISION MAKING

This strategy defines the need to move fully from an outputs model to a long term outcomes model. This strategy aligns our work with the data and allows us to make decisions based on impact. Further, it allows the organization to track data across program areas and departments and to measure the ripple effect of our community asset investments.

The key activities of this strategy touch all areas of the organization and will be held by the following departments:

- » Operations & Administration
- » Fund Development
- » Community Programs

4. FINANCIAL SUSTAINABILITY

This strategy recognizes that for an Anchor Organization to maximize impact and lead change, it must be financially strong. The strategy aligns the financial sustainability work we've engaged in over the last several years with future opportunity. The creation of a solid foundation allows the organization to be resilient in the face of threat, change, and opportunity.

The key activities of this strategy touch all areas of the organization and will be held by the following areas:

- » Fund Development
- » Real Estate Development and Property Management
- » Finance

5. STAFF ENGAGEMENT AND LEADERSHIP DEVELOPMENT

This strategy acknowledges that our employees are our greatest asset. The strategy aligns the work of the Staff Engagement Committee and other staff committees with Human Resources, Leadership Staff, and the Board of Directors. The strategy links back to our organizational values, creating a workplace of integrity that is rooted in culture and joy.

The key activities of this strategy touch all areas of the organization and will be held by the following groups:

- » Employee Committees
- » Human Resources
- » The Leadership Team
- » Board of Directors

The Neighborhood Hub Approach

STRATEGIC DIRECTION 1 — INTERGENERATIONAL PATHWAY STRATEGY

Integrate and strengthen The Unity Council's portfolio of high-performing, integrated, and impact-oriented services.

GOAL 1.1. Focus, deepen and integrate The Unity Council's multi-pronged intergenerational pathway services and programs.

Objectives

1. Integrate programs including (but not limited to) youth mentorship, career, and financial services
2. Link all programs from early childhood development to senior programs through initiatives like; healthy food, community, and cultural arts and events
3. Conduct an analysis of population needs and resources to identify where pathways programs can close gaps to achieve maximum success
4. Ensure clients have information and access to receive multiple services, and that services are adequately marketed to the entire family/network
5. Provide orientation to all clients to educate them about additional programs, services, and referral opportunities

6. Create a universal intake process to ensure that each individual's needs are fully understood and addressed

GOAL 1.2. Strengthen and deepen partnerships to connect the community to additional services, programs, resources, and financial supports.

Objectives

1. Strengthen partner relationships in order to provide strategic referrals and coordinated services
2. Identify additional impactful partners and share data and information to ensure successful referrals and warm handoffs
3. Create an active Master Resource & Referral reference book containing resources utilized by all programs and identified as necessary by the community
4. Track impact of public and private partnerships through client success

STRATEGIC DIRECTION 2 — EQUITABLE ECONOMIC DEVELOPMENT STRATEGY

Advance equitable economic and neighborhood development activities that lead to vibrant, Healthy Neighborhood Hubs.

GOAL 2.1. Develop a healthy neighborhood outcomes plan with quantifiable indicators in housing, health, nutrition, open spaces, transportation, education, art and culture, small business success and community engagement.

Objectives

1. Engage and convene public and private partners to develop a community resilience plan for the Fruitvale district, with the possibility of replicating in Concord
2. Conduct community focus groups to identify unmet needs and aggregate and share data with partners
3. Facilitate and support a community leadership group to help shape and develop future initiatives, programs, and services
4. Give community leadership groups direct access to senior staff and Board of Directors
5. Share data and best practices with partners to track outcomes in the social determinants of health
6. Engage health care partners to build out health and nutrition initiatives including (but not limited to) Fruitvale farmers market and senior citizens healthy food access

GOAL 2.2. Grow The Unity Council's real estate capacity to reduce displacement and create equitable spaces to live and work through acquisition, preservation, and creation of affordable housing and public benefit developments.

Objectives

1. Expand the Housing Assistance and Retention Clinic to double its current impact
2. Posada de Colores—refinance, rehabilitate and lock in permanent affordability of 100 units of senior housing

3. Fruitvale Village Phase II—Develop 275 units of affordable and market rate housing with community development partners
4. Masonic Temple—Develop 'Juntos Fruitvale', a community and cultural arts and co-working space
5. Future Real Estate Development—Identify new affordable housing development opportunities in the Fruitvale District, East Oakland and/or the Monument Corridor of Concord
6. Pipeline—Establish at least 100 units of affordable housing in the pipeline within the 5-year timeframe

GOAL 2.3. Create and strengthen partnerships with public and private sectors to ensure that an array of quality services is available to every neighborhood hub.

Objectives

1. As a result of community leadership, focus groups and partner convenings, identify gaps in services within the neighborhood hub and engage new partners to fill the gap
2. Expand geographically only where strong partnerships or willing partners exist in order to achieve high-quality holistic services for the entire community
3. Highlight partnerships and neighborhood hubs and wrap-around services in marketing materials and on the website
4. Create a Neighborhood Hub Resource & Referral web page as a link to external partners and as a reference guide

Anchor Organization

STRATEGIC DIRECTION 3 — DATA-INFORMED DECISION MAKING

Develop an organizational culture and infrastructure that supports data-informed decision making for increased impact in programs and services.

GOAL 3.1. Develop a framework for measuring impact across The Unity Council's work in intergenerational pathways and equitable neighborhood development to better understand the impact the organization is having on lives and the community.

Objectives

1. Adopt an organization-wide framework for tracking performance measures, indicators, and outcomes
2. Use a shared database system to track organization-wide impact as well as grant contract deliverables
3. Improve in-house learning and cross-discipline sharing of information

GOAL 3.2. Invest in the capacity of data systems, training, and management.

Objectives

1. Identify appropriate funding sources to invest in data systems through philanthropic investment or, if possible, earned income
2. Invest in consultant to recommend appropriate systems, implement usage, and migrate data
3. Develop staff training plan and data-sharing plan
4. Hire data analysis staff for ongoing program and services improvement and seamless data sharing and reporting

STRATEGIC DIRECTION 4 — SUSTAINABLE REVENUE

Develop sustainable, diverse streams of revenue that cover full costs of doing business.

GOAL 4.1. Deepen fund development and communications impact to build and strengthen philanthropic relationships and better communicate community outcomes.

Objectives

1. Develop an annual fund development plan, including the diversification of philanthropic funding encompassing corporate, foundation, and government funds
2. Develop an individual donor and major gifts program
3. Build the Board of Directors' capacity to actively support fundraising efforts and goals
4. Standardize marketing materials and communications
5. Regularly publish impact data in print and digital formats

GOAL 4.2. Increase revenue-generating opportunities.

Objectives

1. Create a Real Estate development strategy that includes a re-launch of the Real Estate development department
2. Refinance existing properties
3. Maximize income of current Real Estate Development through strategic partnerships
4. Explore feasibility of third-party property management with mission-aligned organizations
5. Seek technical assistance to identify income-generating opportunities such as rental and creative use of existing assets for alternative use
6. Maximize commercial and retail rents wherever possible

GOAL 4.3. Conduct regular evaluation of programs and departments for fiscal sustainability.

Objectives

1. Create program and department sustainability dashboards for board meetings and management use

2. Report any program deficit to Board of Directors at annual budget review and ask for board resolution to maintain or subsidize the program
3. Develop exit plan when a program or department is not financially sustainable

STRATEGIC DIRECTION 5 — STAFF LEADERSHIP DEVELOPMENT

Foster an organizational culture of engagement, leadership, and performance, where impact is recognized, and with a workforce that represents the communities we serve.

GOAL 5.1. The Unity Council staff are trained, coached, and developed for leadership positions inside and outside of the the organization.

Objectives

1. Develop an organization-wide leadership development program—The Unity Council Leadership Academy—for staff at all levels
2. Build internal career pipelines, with clear growth opportunities in each position
3. Clearly articulate the expectations of leadership positions within the organization
4. Create a reputation with stakeholders of developing excellent leaders in the community and beyond

GOAL 5.2. The Unity Council workplace is joyful, engaging, high-performing, and teamwork-focused. Staff are engaged and active in making The Unity Council an excellent place to work.

Objectives

1. Staff lead culture and engagement committee chairs have direct access to executive staff and board
2. Leadership and staff create opportunities to celebrate hard work and contributions to the organization and the community
3. Celebration is the rule, not the exception
4. Leadership and Board of Directors commit to attend at least two celebratory all-staff events annually
5. Staff report high levels of job satisfaction through annual staff satisfaction survey

GOAL 5.3. The Unity Council staff have access to learning opportunities regarding current state, local, and federal policy and current events.

Objectives

1. The Unity Council promotes ongoing learning opportunities through policy and current event guest speakers and training
2. Policy/Advocacy is driven in part by staff recommendation
3. The agency and all staff create safe spaces to voice ideas and concerns

GOAL 5.4. Create and maintain a diverse workforce that reflects our community and clients.

Objectives

1. Development of formal policy regarding local hiring and a diverse workforce with equitable salaries and benefits
2. Actively recruit clients from the community for employment, including from our own programs
3. Commitment to diversity (race, ethnicity, age, gender, LGBTQ, language) is measured and amplified
4. Commitment to ongoing training in the areas of sexual orientation, racial, social, and gender equity
5. Celebration and appreciation of staff identity, as measured through annual staff satisfaction survey

APPENDIX

The Strategic Planning Process

The Unity Council, along with its consultant, Montesinos & Associates, designed a comprehensive set of steps for its strategic planning process, including:

1. Co-Design Phase

Initial conversations with board and staff about vision, interests, needs, and concerns for developing an effective strategic planning process;

Document review of key written materials such as reports, meeting minutes, historical documents, program documents, and website;

Creation of a core team to guide the strategic planning process;

From these initial conversations and document review, the consultant developed a detailed strategic planning process responding to the organization's interests and needs.

2. Understanding Current Situation: SWOT Analysis and Stakeholder Input

Working with TUC, the consultant interviewed a strategic group of stakeholders external to the organization.

The consultant provided support to TUC to conduct five constituent focus groups.

SWOT exercises were conducted with board and staff.

TUC also created an online survey to obtain additional feedback from staff regarding mission, vision, and values.

3. Critical Strategic Issues and Challenges

After reviewing findings from the assessment, the consultant, working with key stakeholders, helped the organization identify critical strategic issues, challenges, and opportunities. Key findings were used to help identify priorities and strategies.

4. Mission, Vision, and Values

TUC had the opportunity to review and clarify its mission statement to ensure current relevance. The organization also had the opportunity to update its vision statement and to articulate core organizational values.

5. Affirming and Refining Strategies: Theory of Change, and Key Priorities

With consideration of stakeholder feedback, TUC developed a theory of change that included key strategies and outcomes.

6. TUC Staff & Board of Directors Retreat

TUC held a retreat for board and staff to review the strategic plan and to begin soliciting ideas for how to best implement the plan.

SUMMARY OF STAKEHOLDER FEEDBACK

Strengths	Challenges
Strong anchor organization	Recovering and learning from recent financial challenges
Resiliency and creativity	The need for a strategic plan
Cultural competency	Diversity of talent and technical expertise on the Board of Directors
Community development and social programs	Lack of clarity around business model and service model
Driver of economic activity	Current political landscape

SUMMARY OF COMMUNITY FOCUS GROUP FEEDBACK

Strengths	Opportunities / Challenges
Physical, positive impact on the neighborhood	Not sure of all the services provided
Programs have deep impact on families and the community	Not enough information available about services
Safe and welcoming facilities	Although they know the name, not all clients recognize the logo
Families use multiple services	Need for more bilingual information
Caring and dedicated staff	

INTERGENERATIONAL PATHWAY STRATEGY

Ultimate Outcomes	<ul style="list-style-type: none"> ➤ Neighborhood hubs where all residents have equitable access to services and opportunities ➤ Residents have power to shape their lives and community ➤ Productive, engaged & thriving individuals, youth and families 			
Long Term Outcomes	Children and their Families are Ready for School	Children and Youth have the Resources and Support to Succeed in School	Young Adults and Adults have Career Pathways that Achieve Economic Security and Fulfillment	Seniors are Connected, Engaged, and Supported
Indicators	<ol style="list-style-type: none"> 1. Social emotional, language, and cognitive development are age-appropriate 2. Access to a medical/dental care, nutritious food, and stable housing improves health for children 3. Parents are empowered as their child's teacher and advocate 	<ol style="list-style-type: none"> 1. Parents enroll their kids in school, and kids have successful transitions into Preschool, 5th grade, 8th grade, and 12th grade 2. Youth enroll in college or vocational programs 3. Youth have a supportive adult advocating for or mentoring them for career pathway or college 	<ol style="list-style-type: none"> 1. Increased skills and competencies towards career goal 2. Increase in wages of individuals placed into jobs 3. Increase in utilization of financial coaching, and low cost, quality financial services 	<ol style="list-style-type: none"> 1. Feel cared for and valued as integral parts of the community 2. Have healthy and caring social relationships 3. Live in safe, clean, and supportive housing 4. Are able to access healthcare, nutrition support, and relevant social services
Key Activities	<ol style="list-style-type: none"> 1. Provide high quality preschool education/early learning opportunities 2. Provide parents with workshops, referral-based social services, and parent-teacher developmental exchange 3. Provide and promote health fairs and community resources 4. Host the parent advisory council to develop parent leadership 5. Prepare and engage teachers and family advocates 	<ol style="list-style-type: none"> 1. Support parents with navigating school district and college system 2. Provide career exploration and mentorship to school-aged teenagers 3. Provide school-based academic mentoring 4. Link children, youth and parents to all relevant TUC programs 	<ol style="list-style-type: none"> 1. Remove access barriers such as transportation, language, and lack of familiarity with systems 2. Provide assistance with enrollment to vocational programs and college and help with financial aid applications 3. Provide follow up services to all youth graduating high school and to all who receive employment services 4. Provide financial coaching, credit-building and financial resources 	<ol style="list-style-type: none"> 1. Provide recreational activities and on-site social services free of charge 2. Remove access barriers such as transportation or language 3. Integrate seniors in activities with youth and in cultural events that honor their identity 4. Provide or connect seniors to nutritious meals, healthy activities, and medical resources

EQUITABLE ECONOMIC DEVELOPMENT STRATEGY

Ultimate Outcomes	<ul style="list-style-type: none"> ➤ Healthy, safe, and resilient neighborhoods ➤ Culturally thriving and diverse community 			
Long Term Outcomes	Current Residents can Afford to Live in their Neighborhood	Small Businesses Thrive	Cultural Identity is Preserved and Celebrated	Healthy Neighborhoods with Holistic Services Available to All
Indicators	<ol style="list-style-type: none"> 1. Affordable housing expanded and preserved 2. Individuals have the information needed to access and maintain housing 	<ol style="list-style-type: none"> 1. Small businesses have economic support as needed: rental stability and technical assistance 2. Small businesses have access to equitable, affordable and diverse financial products 3. Increase in small business revenue 4. Business owners live near where they work 5. Expanded local employment 	<ol style="list-style-type: none"> 1. Culturally-relevant services, events and businesses are present 2. Community events are well attended by residents 3. Residents are invested in the development of their neighborhood 4. Local artists are supported 	<ol style="list-style-type: none"> 1. Neighborhood is walkable and oriented to public transportation 2. Safe and clean gathering spaces are nearby 3. Healthcare, education, and other service providers are embedded in the neighborhood 4. Nutritious food is available and affordable
Key Activities	<ol style="list-style-type: none"> 1. Relaunch of real estate development department with a strategy to expand and preserve affordable housing 2. Support policies that promote affordable housing 3. Make information and support available for housing retention and access 	<ol style="list-style-type: none"> 1. Small business education and training—budgeting, finance, expense control, marketing, business planning 2. Marketing of small businesses and the Fruitvale Business Improvement District as a destination 3. Access to financial services and products 4. Support small businesses to stay in the neighborhood through real estate and strategic partnerships 	<ol style="list-style-type: none"> 1. Plan, organize and implement community cultural events 2. Community events include input from community members and volunteers 3. Integrate local art in our places and programs 	<ol style="list-style-type: none"> 1. Create and preserve attractive neighborhood landscapes to promote walking and use of public space 2. Provide high-quality property management services 3. Create strategic partnerships with municipalities, local government, other nonprofits, etc. to ensure a wide variety of needed services are available to all 4. Promote nutrition and healthcare through real estate and small business strategies 5. Lift and amplify the voice of the community to business and government leaders



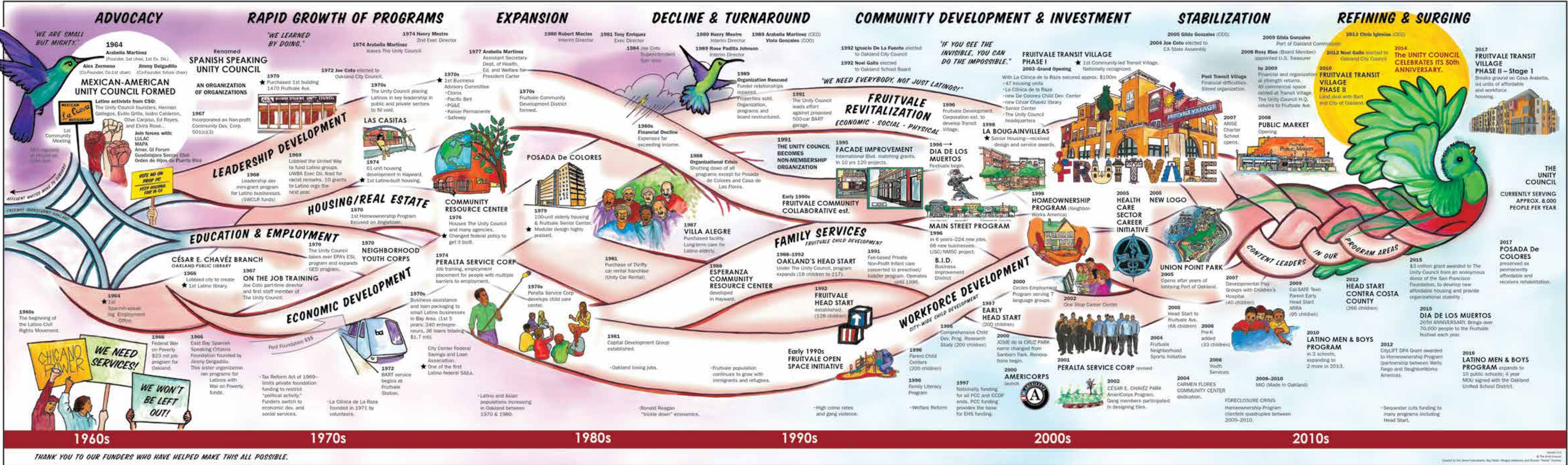
The UNITY COUNCIL History

ERAS:

KEY LEADERSHIP:

KEY EVENTS, PROGRAMS & MILESTONES:

COMMUNITY & EXTERNAL TRENDS:





"Growing Our Roots Proclaiming Our Fruitvale," 2011

Artists: Leslie, Peps 357, D Villegas, A. Symon, Xochitl Nevel Guerrero, Roberto Guerrero, Güero, Michael Muscadine, Aurora, Sagnic The, and Over 100 Community Hands

Sponsored by East Side Arts Alliance, Coatnecalli, and the Injunctions Coalition

ACKNOWLEDGEMENTS

Chris Iglesias
Chief Executive Officer

Erin Patch
Chief Operating Officer

Montesinos & Associates

- › Deb Montesinos
- › Susan Colson

Non-Profit Finance Fund

- › William Pinakiewicz

The Unity Council Strategic Planning Task Force

- › Erin Patch
- › Armando Hernandez
- › Dana Kleinhesselink
- › Luis Arenas
- › Elizabeth Crocker
- › Itzel Diaz
- › Arturo Rodriguez
- › Joyce Boyd
- › Jacob C. Howard
- › Teresa Estrada
- › Freddy Gutierrez

Mission & Vision Committee

- › Alberto Victorica
- › Michele Gonzalez-Pitek
- › Armando Hernandez
- › Dana Kleinhesselink
- › Erin Patch

Stakeholder Interviews

- › East Bay Community Foundation
- › The San Francisco Foundation
- › Kaiser Permanente
- › Y & H Soda Foundation
- › Beneficial State bank

SWOT ANALYSIS

The Unity Council Staff

- › Children and Family Services
- › Peralta Service Corporation
- › Latino Men & Boys
- › Career Services
- › Fruitvale Business Improvement District
- › Finance Department
- › Property Management
- › Human Resources
- › Fund Development and Communications

Community Focus Groups

- › Youth focus group
- › Parents focus group
- › Women's focus group
- › Spanish speaking focus group

The Unity Council Board of Directors

- › Rosy Davalos
- › Ralph Holmes
- › Zenaida Aguilera
- › David Matz, Psy.D.
- › Silvia Guzman
- › Claudia Burgos
- › Orson Aguilar
- › Casey L. Williams
- › Emilio Cruz
- › Tracy Craig
- › Tim Law

Our mission is to promote social equity and improve quality of life by building vibrant communities where everyone can work, learn and thrive.

We envision a joyful, united, and engaged community where people have the power to shape their lives.



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