

2024-2027 STRATEGIC PLAN

United Way of Coastal and Western Connecticut



United Way
of Western Connecticut



A MESSAGE FROM LEADERSHIP

We are delighted to present United Way of Coastal and Western Connecticut's 2024-2027 Strategic Plan, a comprehensive roadmap designed to reaffirm and deepen our commitment to supporting households living at or below the **ALICE**® (**A**sset **L**imited, **I**ncome **C**onstrained, **E**mployed) threshold across the 27 cities and towns in our region. At United Way, we understand the challenges faced by ALICE households—families who work hard yet struggle to make ends meet—and we are dedicated to creating lasting solutions that foster stability and prosperity for all.

Centered on equity and community, our multifaceted approach reflects our unwavering commitment to our most vulnerable individuals through the following pillars:

Advocacy: We will champion policy initiatives that create a more supportive environment for low-to-moderate-income households. Our advocacy efforts will focus on legislation and policies that enhance economic opportunities, improve access to essential services, and provide a safety net for those in need.

Collective Action: Our vision extends beyond immediate relief. We are committed to addressing the root causes of economic instability through systemic change. By fostering partnerships and collective action, we aim to transform the systems that perpetuate inequality and create sustainable pathways to economic self-sufficiency.

Community Partnerships: We recognize that true collaboration is powerful. United Way will serve as a convener, bringing together stakeholders from various sectors—business, government, education, and nonprofit organizations—to collaborate on innovative solutions and drive community-wide change.

Direct Service: We will continue to develop and expand programs with community input to provide immediate and meaningful support to ALICE households, addressing unmet critical needs.

Grantmaking: By funding and partnering with local nonprofits, we extend our impact and outreach. These grants amplify the efforts of organizations driving policy and systems change for households living at or below the ALICE threshold through advocacy, civic engagement, and community organizing. We will continue to serve as a fiduciary for grantmaking initiatives, ensuring transparent and responsible stewardship of funds into community.

This strategic plan is not just a document; it is a promise to our community. A promise that we will continue to fight for the health, education, and financial stability of every person, particularly those who are working tirelessly to build a better life for themselves and their families despite limited resources in an environment of systemic inequities.

We invite you to join us on this journey. Together, we can make a difference and ensure that every household has the opportunity to thrive. Thank you for your continued support and partnership.

Sincerely,

A handwritten signature in cursive script, appearing to read "Cheryl".

Cheryl Bakewell
Chair

A handwritten signature in cursive script, appearing to read "Lyn".

Lyn Kobsa
Vice Chair

A handwritten signature in cursive script, appearing to read "Isabel".

Isabel Almeida
President & CEO

WHO WE ARE

United Way of Coastal and Western Connecticut was formed on July 1, 2023 through a merger of two long-established leading Connecticut-based nonprofit organizations, United Way of Coastal Fairfield County and United Way of Western Connecticut. The partnership aimed to leverage the collective power of both organizations to address the most pressing needs within the 27-town service area located across Fairfield and Southern Litchfield Counties.

United Way remains dedicated to uplifting low-to-moderate-income households called **ALICE**[®] (**A**sset **L**imited, **I**ncome **C**onstrained, **E**mployed). With nearly 42% of households falling at or below the ALICE Threshold in our region, United Way is committed to ensuring that every child enters school ready to learn, every family is financially stable, and every community we serve is healthy and strong. Through a collaborative, multifaceted approach, United Way advocates for policies that address critical needs and create long-term solutions for underserved populations. We invest in effective community programs through impact grants and, where resources do not exist, develop and implement innovative programs. Additionally, we maximize our mission and increase our collective impact through strategic partnerships.

MEET ALICE

ALICE[®] is an acronym for (**A**sset **L**imited, **I**ncome **C**onstrained, **E**mployed) – households that earn more than the Federal Poverty level, but less than the basic cost of living for the county (“ALICE Threshold”).

| Town | Total HH | % ALICE and Poverty |
|---------------|----------|---------------------|
| Bethel | 7,390 | 40% |
| Bridgeport | 55,550 | 66% ↓ |
| Bridgewater | 696 | 18% ↑ |
| Brookfield | 6,584 | 32% ↑ |
| Danbury | 31,692 | 54% ↑ |
| Darien | 7,116 | 16% ↓ |
| Easton | 2,686 | 15% ↓ |
| Fairfield | 20,506 | 24% ↓ |
| Kent | 1,277 | 32% ↓ |
| Monroe | 6,114 | 19% ↓ |
| New Canaan | 7,025 | 16% ↓ |
| New Fairfield | 4,590 | 32% ↑ |
| New Milford | 10,775 | 44% ↑ |

| Town | Total HH | % ALICE and Poverty |
|------------|----------|---------------------|
| Newtown | 9,563 | 26% ↓ |
| Norwalk | 35,272 | 45% ↑ |
| Redding | 3,374 | 25% ↓ |
| Ridgefield | 9,191 | 27% |
| Roxbury | 968 | 20% ↓ |
| Sherman | 1,573 | 32% ↑ |
| Stamford | 53,520 | 45% ↑ |
| Stratford | 20,821 | 41% ↓ |
| Trumbull | 11,820 | 23% ↓ |
| Warren | 523 | 24% ↑ |
| Washington | 1,453 | 35% ↑ |
| Weston | 3,549 | 16% ↓ |
| Westport | 9,725 | 21% ↑ |
| Wilton | 6,210 | 19% |

Red arrows indicate increase in % ALICE and poverty from 2022 data to 2024 data.
Green arrows indicate decrease in % ALICE and poverty from 2022 data to 2024 data.

OUR PROCESS

Upon completion of our merger, the Board of Directors turned their focus to laying a strategic path forward for the new organization. Under the leadership of Board Vice Chair Lyn Kobsa, a Strategic Planning Committee was established to develop a comprehensive and energizing 3-year plan. This plan includes goals and objectives that will serve as guiding principles for future decision-making. Centered on equity, the process prioritized input from a variety of stakeholders including clients and customers of current programs and initiatives, community partners, donors, and volunteers. United Way Board and staff were deeply engaged in refining the mission, vision, values, goals, and objectives of the organization.

KEY COMPONENTS OF OUR STRATEGIC PLANNING PROCESS

| | |
|--|--|
| Environmental Research | Research into, and analysis of, relevant environmental information, such as community needs, gaps in services and resources, the landscape of United Ways across the country, nonprofit best practices, and economic forces that could impact our United Way. |
| Stakeholder and Community Interviews | Input gathered from key stakeholder groups including members of the Board, Councils, and Committees, donors, community leaders, partner organizations, community members and clients via community conversations, interviews, and surveys. |
| Assessment of Current Programs and Partnerships | Review of current programs and services to understand our full program scope, the resources we are using to deliver the programs, and the outcomes that we are generating. Evaluating feedback from clients and customers of our programs to understand evolving needs and effectiveness of program support. An assessment of our partnership strategy today and into the future, to identify partners with whom we could work to have a greater, more efficient impact. |

United Way's strategic plan for the years 2024 – 2027 is focused on building strength through effective programs and strategic community partnerships. We aim to capitalize on the efficiencies of the merged organizations and pivot to a sustainable financial model to benefit our communities by cultivating individual, corporate, and grant support for our direct service and collective action programs.

VISION • MISSION • VALUES

OUR VISION

We envision a community where every person is healthy, safe, and economically secure.

OUR MISSION

In partnership with community, we address critical needs and advance equitable pathways to well-being and financial security for everyone.

OUR VALUES

Informed: guided by data, lived experience, and community voice

We are committed to listening to community, lifting up lived experience, and guiding our work through data-informed decision-making.

Collaborative: respect, partnership, and empowerment

We are committed to working collaboratively with community, nonprofits, businesses, and government on equitable solutions that are effective, empowering, respectful, and inclusive.

Responsive: action-oriented change agents, flexible, agile and innovative

We are committed to being responsive and adaptive, thinking innovatively as we co-design solutions that best meet the needs of community.

Accountable: transparency and accountability that leads to trust

We are committed to bringing quality services to all whom we partner with and serve, and to holding ourselves accountable to donors, volunteers, clients, and community.

IMPACT MODEL

To create meaningful and lasting change in our community, United Way of Coastal and Western Connecticut employs a comprehensive strategy that centers around our commitment to equity and community and includes addressing both critical needs and creating long-term lasting change.

COMMITMENT TO EQUITY AND COMMUNITY

United Way of Coastal and Western Connecticut is committed to building our community into a place where everyone has the opportunity to thrive. We prioritize and leverage our strong partnership with the community to ensure our work is improving lives and creating a future of greater inclusion and equity.



ORGANIZATIONAL PRIORITIES

CENTER EQUITY THROUGH AUTHENTIC COMMUNITY ENGAGEMENT

United Way will deepen its commitment to equity by prioritizing community-driven initiatives designed to serve its unique needs and reflecting inclusive structures and processes that represent the diverse voices and experiences of those we serve.

DELIVER EFFECTIVE, ACCESSIBLE, AND SUSTAINABLE DIRECT SERVICE PROGRAMS

United Way will deliver essential programs and resources directly to underserved communities, ensuring equitable access and support for households living at or below the ALICE Threshold.

STRENGTHEN COMMUNITY THROUGH STRATEGIC GRANTMAKING

United Way will elevate grassroots and community-based organizations through strategic investments, fostering sustainable growth and impact.

PROMOTE AN ADVOCACY AGENDA THAT REMOVES BARRIERS FROM SYSTEMS AND ENHANCES MEANINGFUL SUPPORT FOR ALICE HOUSEHOLDS

United Way will champion equitable policies and practices at local, state, and federal levels, amplifying community voice to improve outcomes for all.

SUPPORT COLLABORATION THROUGH MEANINGFUL PARTNERSHIPS AND CONVENING

United Way will facilitate inclusive collaboration among organizations, businesses, and individuals to address complex community challenges.

STRENGTHEN COLLECTIVE IMPACT INITIATIVES THROUGH PURPOSEFUL SUPPORT, PARTNERSHIP, MENTORSHIP, AND COLLABORATION

United Way will catalyze collective impact by cultivating enduring partnerships to realize long-term solutions for youth and their families from cradle to career (C2C).



TO LEARN MORE

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Email us at info@unitedwaycwc.org