



WANDA
Women and Allies

PREPARED BY
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DATE ADOPTED
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FINAL VERSION

Five Year
STRATEGIC PLAN

TABLE OF CONTENTS 1

Executive Summary 2

Background

- Legal Name and Address 4
- Needs Served/ Importance 4
- Geographic Region Served 4
- Successes of Past Year 5
- Anticipated Challenges 5
- Communications 5

Mission 6

Vision 6

History and Credo 6

Who We Serve 7

What We Believe 7

Our Values 8

Situational Analysis (SWOT) 9

Goals 10

Smart Objectives 11

Measurements of Success 12

Action Plans

- Year One (2024) 13
- Year Two (2025) 14
- Year Three – Five (2026–2028) 15

Directional Financials 16

Logic Model 17

Theory of Change 18–19

EXECUTIVE SUMMARY

Over the next five years, WANDA (Women and Allies) will implement a comprehensive plan to modernize our program, advancing the socioeconomic mobility of single mothers and their families while expanding our impact. We will navigate changes by building on our history of success and values, which are shaped by time-bound engagement, peer connection, and long-term behavior change. The needs of single mothers are evolving, and WANDA recognizes the necessity to be flexible in our strategic approach, incorporating new mindsets and experiences into leadership. Our strategic plan focuses on enhancing our program, refining our delivery and structure, diversifying our fundraising efforts, and strengthening our governance and staffing.

Program Enhancements

We will re-evaluate our participant incentive structure to explore alternative rewards, such as recognizing class attendance and budget management. Additionally, we will assess the match amount and broaden the use of savings beyond the current asset categories. Our curriculum will undergo significant revisions to include updated career-focused content and increased use of technology in instruction, ensuring our participants are well-prepared for the evolving job market while allowing for streamlined and effective content communication and delivery.

Education Initiatives: Updating our career curriculum will be a continuous effort, ensuring it remains relevant and effective. Integrating technology into our educational content and delivery methods will also be a priority, preparing our participants for a technologically advanced job market. Modern technological tools will support WANDA's expansion and enhance the overall educational experience.

Program Delivery and Structure: Client engagement has changed significantly since COVID-19, making it essential to leverage strategic technology to improve participant experience and streamline program delivery. We are open to delivering our program in multiple languages to better serve our diverse communities. Structurally, we will explore developing a pipeline option for potential clients who are not positioned to the current full WANDA program, clearly identifying costs and scope of work. Additionally, we will seek new ways to build a supportive community of individuals with shared experiences, re-assess the length of our program, and evaluate the number of cohorts we serve annually.

Investment Strategy: We will review and update our match criteria and timing to optimize benefits for our participants, ensuring they receive the support they need when they need it most. Strategic investments will support both innovation and stability within our programs.

Empowerment Initiatives: Enhancing our virtual means of connection and resources will empower our participants, providing them with the tools and support necessary to succeed. Utilizing modern technological tools will streamline program delivery and community building, improving the overall experience for participants.

Fundraising Strategy

Our fundraising efforts will focus on establishing a comprehensive plan that broadens our reach through strategic partnerships, board networks, and donor engagement. We aim to diversify our funding streams with targeted giving campaigns, such as the “sponsor a mom” campaign, which offers structured giving opportunities to directly support our participants. We will target specific donor groups, such as young activated female donors, legacy donors, and new donors with affinity for women, leadership and family advancement priorities. We will also explore implementing a fee-for-service model, leveraging a plug-and-play program approach, and pursuing partnerships with affinity groups and giving circles to expand our donor base. Innovating how we secure revenue is crucial for ensuring both stability and the ability to adapt and innovate.

Governance and Staffing

Strategically expanding our Board will be essential to diversifying participants and broadening our network of supporters. To support our program’s expansion, we will add staff, particularly in outreach roles, targeting communities and organizations for recruitment. Incorporating new experiences and perspectives into leadership will help guide WANDA in a rapidly changing environment.

Strategic Initiatives

We will pursue strategic partnerships and establish a Leadership Fund guided by our Client Advisory Committee to support our initiatives. Collective impact in the sector will be achieved through these targeted efforts.

Geographic Reach: We are committed to expanding our geographic reach to areas such as East San Jose, North San Mateo, and Gilroy, based on current beliefs about where our program is most needed. This expansion will enable us to reach more single mothers and provide the support they need to achieve socioeconomic mobility, while enhancing the work of our social sector partners working and serving constituents in those local communities.

Through these initiatives, WANDA will create a more robust, supportive, and effective program, driving long-term positive change and advancing the socioeconomic mobility of single mothers in our community.



BACKGROUND

Legal Name and Address

WANDA Women and Allies, 650B Fremont Avenue, Suite #130, Los Altos, CA 94024

Needs Served/ Importance

San Mateo and Santa Clara Counties have greater income inequality than any others in California, a state where asset poverty rates are about 2 times income poverty rates. Lack of asset ownership limits income opportunities, such as seeking advanced education or starting a business. Asset ownership and wealth are more of an elemental measure of economic well-being than income and more likely to be affected by previous generations, allowing families to weather financial hardships, such as economic downturns and unexpected periods of unemployment. The economic situation for women and people of color is dire with one quarter of female-headed households and one third of minority-headed households having zero or negative net worth.

Approximately 15 percent of households are led by single mothers in San Mateo County, with 34 percent living below the Federal Poverty Rate, five times more than the rate for married couples. In Santa Clara County, female-headed households have the lowest incomes and women earn 28 percent less than men across all occupations. Low income families within these counties lag drastically behind in economic and quality-of-life metrics, including income potential, educational attainment and business ownership.

WANDA believes that uplifting mothers leads to profound intergenerational impact, significantly improving the lives and futures of their children. By empowering mothers with financial capability, career planning, and supportive networks, we foster environments where children can thrive, breaking cycles of poverty and enhancing their opportunities for success. This holistic approach ensures that the benefits of our programs extend beyond immediate participants, creating lasting positive change for entire families.

Geographic Region Served

San Mateo and Santa Clara Counties

Successes of Past Year

- ✦ Growing diverse Board of Directors, adding an alumna as an advisor to the board
- ✦ Recognized as independent 501(c)(3) after years of fiscal sponsorship
- ✦ Successful strategic partnership with MidPen Housing, resulting in 40% service increase and renewal of program
- ✦ High-impact longitudinal data on participant success and sustained outcomes
- ✦ Establishment of Alumnae Advisory Board

Anticipating Challenges

- ✦ Solidifying additional multi-year organizational partnerships
- ✦ New funding acquisition and diversifying of individual donor base
- ✦ Accessing and supporting more single mother participants
- ✦ Cultural and linguistic diversity

Communications

CALL TO ACTION

Single mothers represent a significant component of the low-income population and face compounding financial challenges as women in an inequitable society. With the right support, they ascend from surviving to thriving. They mentor the next generation of citizens.

REACH AND CHANNELS

Online collateral (website, newsletters, social media); print (letters, reports); board/staff meetings, calls, texts; strategic events; videos.

SCHEDULE AND FREQUENCY

1 monthly newsletter; weekly social media channel posts, 2 annual mailings, 1-2 annual special events.

MEASURING REACH

Surveys, analytics, investment totals, and attendance.

Mission

WANDA advances socioeconomic mobility for striving single mothers.

Vision

To secure generational economic justice and equity for single mother families.

History & Credo

Founded in 2007, WANDA began as a fiscally sponsored project focused on enhancing the financial self-sufficiency of single working mothers in San Mateo and Santa Clara Counties. Initially a project under the Women's Foundation of California and later Social Good Fund, WANDA commenced full operations as an independent nonprofit corporation on July 1, 2023.

WANDA started as an Individual Development Account (IDA) program, offering a 2:1 financial match to participant savings, alongside FDIC Money Smart-modeled financial capability classes. Early operations were managed by Opportunity Fund, while WANDA focused on fundraising, primarily supported by the founders and their network. The organization hired its first Executive Director in 2014 and Program Manager in 2015, successfully meeting 90 percent of strategic goals over five years.

WANDA's program is built on three pillars:

Educate: WANDA facilitates a comprehensive virtual curriculum covering essential topics such as financial capability, professional and personal advancement, equipping participants with the knowledge and tools needed to navigate today's ever-changing economic landscape successfully.

Invest: WANDA offers a 2:1 financial match for participants' savings, which can be invested in assets like 529 plans for education, retirement funds, or home purchases. To date, participants have collectively saved and invested over \$1.7 million, demonstrating the substantial impact of this support.

Empower: WANDA empowers women by engaging them in a cohort model, fostering a strong network of success-minded individuals. Through these connections, participants build lasting confidence and a sense of empowerment.

Recognizing the significant need, with 34 percent of single mothers in San Mateo and Santa Clara counties living below the poverty line, WANDA has grown beyond its initial support circle. Today, it partners with other regional health and human services organizations, poised for exponential growth over the next five years.

Who We Serve

WANDA has engaged hundreds of single mothers in Silicon Valley, San Mateo and Santa Clara Counties, who fall at or below 60 percent of the Area Median Income (AMI). The majority of our program participants are women of color. WANDA focuses on empowering women who are committed to transforming their financial situations and achieving long-term stability. Our comprehensive support model is designed to best serve women who are motivated to improve their economic well-being and create a better future for themselves and their families.

What We Believe

We believe that **single mothers in the Bay Area**, one of the wealthiest regions in California and the US, face unique challenges including juggling multiple jobs, high living costs, and the pressure of an inflexible, specialized job market dominated by the tech industry.

We believe these compounding challenges require adaptable, tailored interventions to **empower single mothers to overcome them effectively**.

We believe that supporting change requires a **commitment over time** and a **multi-faceted approach**.

We believe in the **confidence-success cycle**, where confidence drives action, action leads to success, and success creates confidence, creating **positive forward momentum** that sets precedent for the next generation.

We believe in WANDA's relevance in the social sector, tenured history, and programmatic success **elevates the collective economic justice work of community partners** in service of single mother families.

OUR VALUES



Empowerment

We empower our single mothers by providing them with the tools, support, and confidence to take control of their lives and futures. We equip them with the resources they need to navigate challenges, make informed decisions, and advocate for themselves and their families, ultimately empowering them to break the cycle of poverty and achieve their goals.



Connection

We foster a strong sense of community and belonging among our single mothers by creating spaces where they can connect with each other, share experiences, offer support, and inspire each other. Through these connections, they can find strength, solidarity, and a network of allies who understand their journey and are there to uplift and empower them every step of the way.



Collaboration

We work with single mothers as partners in their journey towards upward socioeconomic mobility, supporting the co-creation of solutions, leveraging their unique strengths and insights, and collaborating with other organizations and stakeholders to address systemic barriers and create opportunities for collective advancement. By fostering a culture of collaboration, we ensure that their voices are heard, their needs are met, and their contributions are valued.



Confidence (Success Style)

Confidence within the success cycle is about instilling in our single mothers a belief in their own abilities, capacity, and potential to create positive change in their lives. It's about celebrating their successes and empowering them to overcome setbacks with resilience and determination.



Calculated Risk Taking

We encourage our single mothers to step outside of their comfort zones and pursue opportunities for growth and advancement, while also providing them with the guidance and support they need to make informed decisions. We help them to identify and evaluate risks, weigh potential rewards, and develop strategies to mitigate challenges. We foster goal setting and accountability, empowering them to seize opportunities, explore new pathways, and achieve their aspirations with confidence and resilience.

SITUATIONAL ANALYSIS

Strengths

Unique program model

Relevance

Reputation

Strong Metrics

Credible Partnerships

Reserves allowing for strategic innovation

Dedicated, working board

Weaknesses

Access to new, major donors

Reliance on philanthropic revenue

Limited Resources to serve larger numbers (staff)

Shrinking geographic footprint

Lack of follow-through by dedicated partners

Attrition

Need for expanded board and staff diversity

Sector relevance (women, poverty, Universal Based Assets/Income)

Access to partnerships supporting growth

Funder loyalty and willingness to grow

Geographic service area

Respected, alumnae facilitators

Board Diversification

Opportunities

Major donor attrition

Inconsistent partner deliverables/ timing/ funding

Program/ Operating Ratio

Community Impacts and attrition

Environmental Impacts (policy/ support changes)

Population migration

Over dependence on specific funders

Threats



GOALS

Goal 1: Increase the Number of Single Mothers Engaged in WANDA's Program

Broadening the reach of WANDA's initiatives to ensure more single mothers benefit from our comprehensive support, leading to improved financial capability, career skills, and empowerment.

Goal 2: Increase Number of Individual Donors and Their Gifts Supporting WANDA

Bolstering WANDA's financial sustainability by growing the donor base and increasing contributions.

Goal 3: Build and Retain Board with Diverse Individuals with Access to Networks that Will Become WANDA Allies

Ensuring a diverse and connected team to strengthen governance, enhance program development, and create new opportunities.

Goal 4: Expand the Resources and Expertise to Engage More Directly in Regional Bay Area Communities to Enhance Local Impact and Growth

Engaging directly to develop partnerships, and expertise in Bay Area communities to address specific economic challenges and support community-driven projects.

OBJECTIVES

Program	1	Expand Outreach: By Q4 2025, increase the number of single mothers engaged in its programs by 25% through targeted outreach and enhanced program accessibility.
	2	Improve Curriculum: By Q4 2025, revise curriculum to include more relevant content, aiming for a 15% improvement in participant outcomes (specific outcome metrics TBD).
	3	Increase Participant Engagement: By Q4 2025, achieve a 20% higher attendance rate through enhanced interaction and support mechanisms.
	4	Improve Program Delivery: By Q3 2026, utilize more sophisticated technology to deliver WANDA's programming, having tested options during the previous curriculum year.
	5	Expand Cohort Engagement: By Q2 2025, hire 2 diverse, professional instructors versed in WANDA curriculum to enhance cohort engagement.
Development	1	Grow Donor Base: By Q4 2025, increase donor base by 10% annually through targeted fundraising campaigns and relationship-building.
	2	Increase Donations: By Q4 2025, increase total donations by 20% annually by developing targeted fundraising strategies and showcasing impact.
	3	Enhance Donor Engagement: By Q4 2025, retain 70% of donors annually through enhanced engagement and feedback mechanisms.
Operations	1	Expand Board: By Q4 2025, recruit up to 5 new board members with diverse backgrounds, including alumnae, to enhance governance and strategic oversight.
	2	Enhance Staffing: By Q4 2025, recruit 1-2 new staff members with specialized skills and diverse backgrounds to support program delivery.
Community/ Sector	1	Increase Community Investment: By Q4 2025, invest in and collaborate with local communities through Leadership Fund to enhance local impact and economic growth.
	2	Foster Partnerships: By Q4 2025, establish 1-2 new cohort service partnerships annually targeting communities in need to enhance local impact.
	3	Expand Geographic Reach: By Q4 2026, add one new geography to its service area every two years to broaden reach and impact.

MEASUREMENTS OF SUCCESS

THEME	Measurable Component Description	When	How to Measure	Metric
Program	Participant enrollment numbers and outreach campaign effectiveness to achieve a 25% increase in participant enrollment.	Annually	Track participant enrollment and engagement through program records.	Existing
	Participant satisfaction scores, and improvement in competency measures post-training (specific metrics TBD) to achieve a 15% improvement in participant outcomes.	Q4 '25	Analyze participant outcomes and satisfaction surveys.	
	Attendance rates, participant feedback on engagement, and retention rates in programs to achieve a 20% higher attendance rate.	Q4 '25	Monitor attendance and participation records.	
	Number of participants report sharing learnings with their children.	Annual	Ensure question remains in participant survey.	
	Number of instructors hired, language proficiency of hired instructors, and participant feedback on instructor effectiveness to engage 2-3 trained experts.	Q2 '25	Track hiring progress and instructor evaluations.	New
Development	Number of new donors and donor retention rates to achieve a 10% increase in new donors each year.	Q1 Annually	Track donor numbers and retention through donor management systems.	New
	Total donation amounts and average donation size to achieve a 20% increase in total donations each year.		Monitor donation amounts through financial records.	
	Donor retention rates and donor feedback and satisfaction to retain 70% of existing donors each year.		Analyze donor retention data and feedback.	
Operations	Number of new board members recruited, diversity metrics of board, and inclusion of alumnae to recruit 5 new board members.	Q4 '25	Monitor board recruitment and diversity metrics.	New
	Number of new staff members recruited, diversity metrics of new hires, and staff retention rates to recruit 2 new staff members.		Track staff recruitment and retention through HR records.	
Community/ Sector	Amount of funds invested and impact assessments of investments to invest 70% of funds locally.	Biennially	Monitor financial records and impact reports.	New
	Number of new geographic areas served and participant enrollment in new areas to expand to one new area every two years.		Monitor partnership agreements and outcomes.	
	Number of new partnerships and partnership impact assessments to establish 1-2 new partnerships each year.	Annually	Track geographic expansion and participant data.	

ACTION PLANS – YEAR ONE (2024)

THEME	Action	Related Objectives	Responsible	Dependencies
Q1 2024 (01/01-03/31)	Develop targeted outreach campaigns to increase participant enrollment.	Expand outreach	Program, Comms	Complete (with annual implementation)
	Gather data on demographic dynamics to inform plans for growth.	Expand impact	Board	Complete
	Conduct strategic assessment to determine key priorities and areas of focus.	Expand impact	Board	Complete
Q2 2024 (04/01-06/30)	Develop strategies to build a community among participants with shared experiences.	Enhance cohort engagement	Program, Volunteers	In process. Need additional program staff to support
Q3 2024 (07/01-09/30)	Recruit .5 new staff members with diverse backgrounds and specialized skills with goal to onboard by year end.	Enhance leadership	Operations	Outreach and engagement
	Define “competency measures” and put into participant surveys.	Increase participant outcomes and financial capability	Program	Monitoring and administration
	Interview alumnae. Gather input on curriculum needs, savings use options and incentives (to be completed by year end).	Increase participant outcomes and financial capability	Program	Monitoring and administration
	Explore and identify targeted fundraising strategies to increase total donations by 20%.	Increase donations	Development	Increased staffing, fundraising support from Board
Q4 2024 (10/01-12/31)	Identify/plan tests for savings options. Gather feedback for Q2 2025 implementation with the next cohort.	Increase participant outcomes and financial capability	Program	Program staff support
	Onboard 1-2 new Board members	Board expansion	Governance, Operations	Targets, timing, and board outreach

ACTION PLANS – YEAR TWO (2025)

THEME	Action	Related Objectives	Responsible	Dependencies
Q1 2025 (01/01-03/31)	Revise career curriculum to include updated industry trends and job readiness skills (to be completed for inclusion in next program year).	Improve curriculum	Program, Contractor	Timing and budget
	Explore and begin implementing technology solutions for delivering programming.	Increase participant engagement/reach	Comms, IT/ Ops, Program	Identify internal lead, funding, and experts
	Develop scorecard for key organizational metrics	Operational efficiency	All committees	Staff support
	Develop campaigns to attract younger audiences particularly those raised by single mothers.	New donors	Development, Comms	Fundraising support from Board
Q2 2025 (04/01-06/30)	Assess development of “feeder” program for women unable to commit time and savings. Determine timing for implementation.	Increase program access	Program	Additional program staff
	Research and test additional rewards for specific activities (i.e. class attendance and/or budgeting).	Increase participant engagement	Program	Increased fundraising
	Determine feasibility of program presence in new geographic area(s) (implementation timeline TBD).	Expand geographic reach	Development, Program, Comms	Additional program staff
	Launch Leadership Circle Fund through Client Advisory Committee	Increase community investment	Development, Program	Budget and additional program staff
Q3 2025 (07/01-09/30)	Establish 1-2 new cohort annual service partnerships targeting communities in need.	Foster partnerships	Development, Program, Comms	Additional program staff
	Launch giving campaign (Sponsor a mom) to provide structured giving options.	Structured giving opportunities	Development, Comms	Fundraising support from Board
Q4 2025 (10/01-12/31)	Establish Legacy giving program targeting long-term supporters.	Legacy giving	Development, Comms	Fundraising support from Board
	Examine feasibility of serving more cohorts per year.	Expand cohort engagement	Development, Program	Additional program staff



ACTION PLANS – YEAR THREE – FIVE (2026–2028)

Action	Related Objectives	Resources
Revise career curriculum to include updated industry trends and job readiness skills (to be completed for inclusion in next program year).	Increase participant engagement and program effectiveness	Program
Use feedback from previous years to further refine and enhance fundraising scope, strategies, and tactics.	Development and giving diversification and growth	Development
Continue to mature infrastructure including staffing and board composition.	Governance, development	Infrastructure, Operations
Engage with new communities in need to build geographic reach and serve more women.	Grow and expand geographic reach	Program, Comms

DIRECTIONAL FINANCIALS

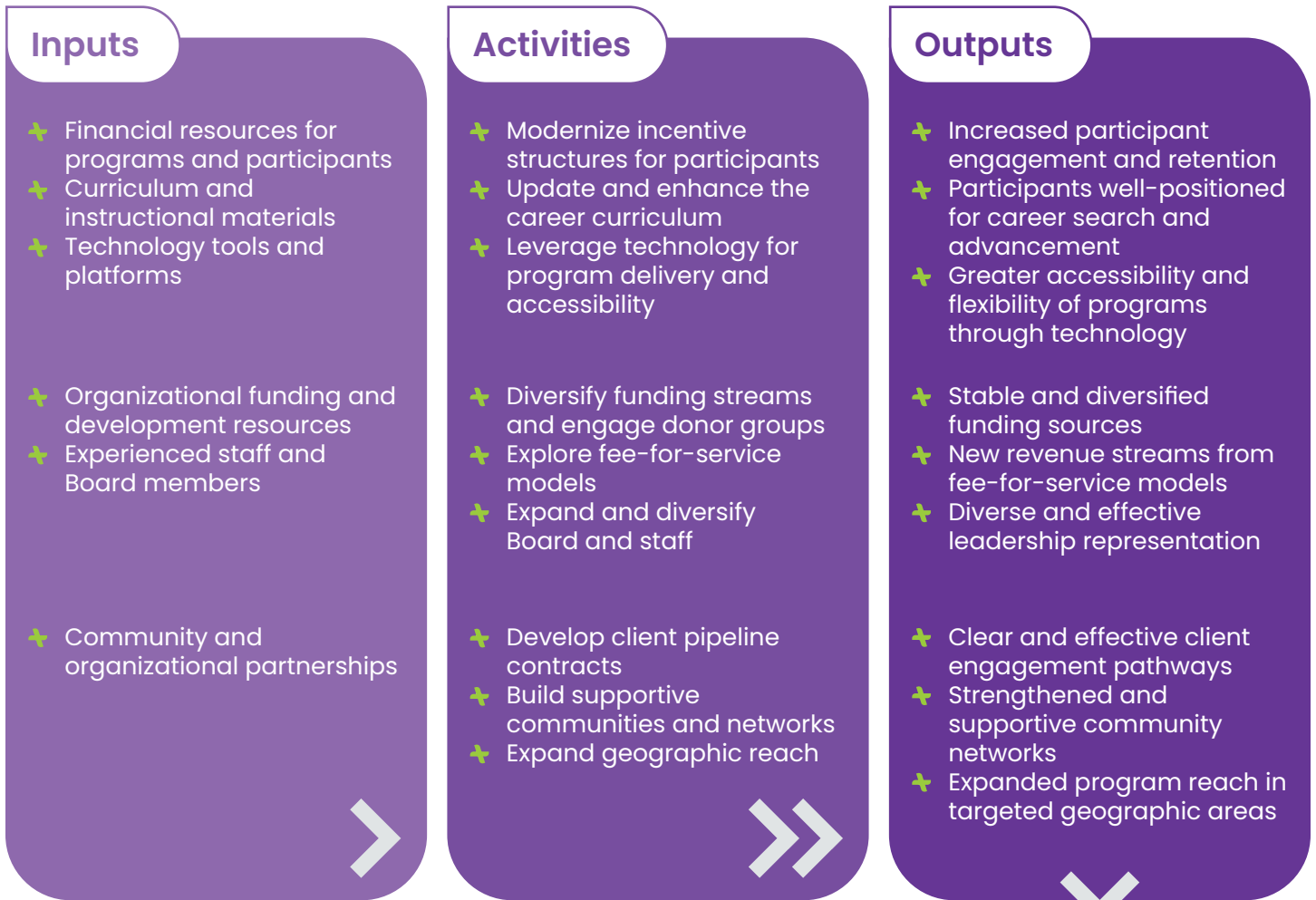
Revenue

Source of Income (Revenue)		2024-2025	2025-2026	2026-2027	2027-2028
Renewable	Individuals	\$235,000	\$282,000	\$338,400	\$406,080
	Foundations	\$185,000	\$222,000	\$266,400	\$319,680
	Corporations	\$25,000	\$30,000	\$36,000	\$43,200
	Earned	\$65,000	\$78,000	\$93,600	\$112,320
	<i>Subtotal</i>	<i>\$510,000</i>	<i>\$630,000</i>	<i>\$756,000</i>	<i>\$907,200</i>
Non-Renewable	Individuals	\$15,000	\$18,000	\$21,600	\$25,920
	Foundations	\$40,000	\$48,000	\$57,600	\$69,120
	Corporations	\$3,000	\$3,600	\$4,320	\$5,184
	Earned	\$32,500	\$39,000	\$46,800	\$56,160
	<i>Subtotal</i>	<i>\$90,500</i>	<i>\$108,600</i>	<i>\$130,320</i>	<i>\$156,384</i>
Total		\$600,500	\$738,600	\$886,320	\$1,063,584
Surplus/Deficit		\$15,500	\$36,600	\$43,920	\$52,704

Expenses

Uses of Funds (Expenses)		2024-2025	2025-2026	2026-2027	2027-2028
Operating	Personnel	\$150,000	\$180,000	\$216,000	\$259,200
	Professional Services	\$20,000	\$24,000	\$28,800	\$34,560
	General Admin	\$15,000	\$18,000	\$21,600	\$25,920
	<i>Subtotal</i>	<i>\$185,000</i>	<i>\$222,000</i>	<i>\$266,400</i>	<i>\$319,680</i>
Program	Management & Admin	\$140,000	\$168,000	\$201,600	\$241,920
	Research, Design & Implementation	\$10,000	\$12,000	\$14,400	\$17,280
	Direct Costs	\$250,000	\$300,000	\$360,000	\$432,000
	<i>Subtotal</i>	<i>\$400,000</i>	<i>\$480,000</i>	<i>\$576,000</i>	<i>\$691,200</i>
Total		\$585,000	\$702,000	\$842,400	\$1,010,880
Reserve Goal		\$46,250	\$55,500	\$66,600	\$79,920

LOGIC MODEL



Outcomes

Short Term

Increased participation and engagement from single mothers, improved job readiness and career skills among participants, enhanced program flexibility and accessibility through technology, and stronger client relationships and community networks.

Long Term

Achieve broader program reach in new geographic areas, a more sustainable and diversified funding base, and a more representative and effective Board and staff, leading to thriving supportive communities.

Impact

WANDA's strategic initiatives will significantly improve the socioeconomic mobility of single mothers, leading to long-term financial stability and improved quality of life for single mothers and their families, contributing to overall social and economic development.

Evaluation

Regular evaluation of program effectiveness, participant outcomes, funding strategies, and community impact conducted to ensure continuous improvement and alignment with strategic goals.

THEORY OF CHANGE

Vision

WANDA envisions a world where single mothers have the support, resources, and opportunities they need to achieve financial stability and socioeconomic mobility.

Problem

Single mothers face significant socioeconomic barriers, including limited access to education, career opportunities, and supportive communities. These challenges hinder their ability to achieve financial stability and socioeconomic mobility.

Strategies

Program Enhancements

Modernize incentive structures and update the curriculum to better support and prepare participants, incorporating technology to improve delivery and accessibility.

Community Building

Develop client pipeline contracts, foster supportive communities, and expand geographic reach to areas with high need.

Fundraising Diversification

Diversify funding streams by engaging donor groups through targeted giving campaigns, and explore fee-for-service models.

Governance and Staffing

Expand and diversify the Board and staff to be representative of the communities served.

Outcomes

- Increased participation and engagement of single mothers.
- Improved job readiness and technological skills among participants.
- Enhanced accessibility and flexibility of programs through technology.
- Stronger client relationships and supportive community networks.
- Expanded program reach and influence in new geographic areas.
- Sustainable and scalable program models driving long-term socioeconomic mobility.

THEORY OF CHANGE

