MISSION

To improve lives by mobilizing the caring power of the San Diego community.
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MESSAGE FROM THE BOARD CHAIR
AND PRESIDENT & CEO

Inspired by the results in our Five-Year Report issued May 2012, we’re building on the success of our programs, like SafeCare®, Bright Futures and Project 25, and capitalizing on new initiatives – which you’ll read about in this report – that move San Diegans towards a better life. Of the many positive changes we’ve witnessed in San Diego, we’re particularly proud of our own capacity to change. More and more we are turning to members of our community to tell us what we need to know. We’re listening, we’re learning and we’re taking their words to heart.

Over the past two years, we asked San Diegans to talk to us about their aspirations and concerns. Last year, we asked about education. We heard about parents’ need for more communication, schools’ need for engaged parents, and children’s need for support and encouragement, both inside and outside the classroom. This year, we moved on to financial self-sufficiency, a subject that reflects the disparity between San Diego’s haves and have-nots. We know that many San Diegans are working hard but falling short. Even with two incomes, many households struggle to make ends meet. Next we listened to what people had to say about health. What are the barriers? How can we help? We can and we are.

After listening to experts, business leaders, parents and students, we have narrowed our Education focus to school readiness and early-grade literacy. As a partner in two important collaborations, the City Heights Partnership for Children and Chula Vista Promise Neighborhoods, our role is proving to be of great value.
Success continues with **Project 25**, our unprecedented collaboration with the city, county and various community partners, with a goal to move the costliest chronically homeless off the street and into housing with support services. At 36 participants, we’ve exceeded our expectations and earned national recognition for an all-encompassing approach to data tracking and analysis, involving hospitals, homeless service providers, the justice system and others. As a true measure of Project 25’s success, we have helped save taxpayers millions of dollars and changed the lives of those homeless who were most in danger of dying on our streets.

With your support, we’ve been able to expand the initiatives that address the concerns voiced in community conversations. Our latest collaboration with the Leichtag Foundation, **Ways to Work**, helps working families obtain reliable cars, increase money-management skills and credit scores, moving themselves towards sustainable economic self-sufficiency.

Everything we do, we do with the help of our community partners, volunteers and supporters. Learn how our collective efforts are aligning city officials, government, businesses, the public and the private sector toward a singular goal: making a better life for our neighbors and our neighborhoods, and for the next generation of San Diegans.
All three of these highlighted success stories are a testament to themselves, the work we do, and the community we share.

**Project 25: Saving Money and Lives**

As a “frequent user” – those chronically homeless who most often burden San Diego’s emergency services – Paige didn’t believe in her own possibilities. Now, Project 25 has stabilized her life.

Since United Way launched Project 25 in 2010 to find the region’s most costliest homeless – frequent users of ambulance rides, emergency rooms and police resources – and place them in permanent housing with support services, taxpayers have saved millions of dollars. And Paige saved her life.

With collaboration from the city, the county, and other partnering organizations, the three-year project helps reduce the burden on emergency services and stabilize 36 lives so they can get the medical and psychological treatment that will help them stay stable. “I thought they were nuts, offering me a free apartment,” Paige said. “I told them to get away from me, but they kept talking to me about it.”

Now Paige lives in a one-bedroom apartment with her cat and takes her medication on time because she knows where it is. Counselors keep track and keep it refilled. She’s on her way to an orthopedic surgeon for help with her knees. “It’s the first time I could get help before everything went wrong since I ran away from home when I was 16,” she said.
Brian Maienschein, Commissioner of the Plan to End Chronic Homelessness, with Project 25 participant James Marsh.
Fred and Alicia illustrate how an education, enough income and good health are integral to life success. They needed education to stabilize their income, the persistence to work through obstacles, and the opportunity to help their children lead stable, healthy lives.

**Ways To Work: Former Vet Gets a Lift**

Fred spent months commuting by bus to the Veterans Administration in La Jolla, where he works. The ride took over an hour, making it tough to get back downtown to his classes at City College. A Vietnam vet, Martinez had been homeless for five years and couldn’t secure a loan for a new car.

Today, through Ways to Work, he’s driving a used Mazda-6, which he bought with an 8% loan (on his own, his rate would have tripled). Now, he can get to and from work and school, and visit his kids in North County. “The car makes a big difference in allowing me to accomplish the goals that I want to accomplish,” he said. Ways to Work participants must be employed or in school and complete financial education courses to improve and sustain good credit. “This program has been a blessing for me,” he said. “It brought me together with my kids.”

“The car makes a big difference in allowing me to accomplish the goals that I want to accomplish.”

—Fred
Bright Futures: From Homeless to Homeowner

A dozen years ago, Alicia escaped an abusive husband and lived in a shelter with her four kids for four months. She took every financial literacy class she could, learned to drive, filed for divorce, got her immigration papers and proved she could support herself without public assistance.

She worked the graveyard shift and used her 7 a.m. break to bus home, get her kids ready for school, and bus back to work. She learned to save money: cutting her kids hair, cooking at home, scouring the sales.

“Being a single mom and making so little money, I thought it was not a possibility for me,” she says. “But I just had to push through.”

Alicia eventually put away $100 a month until she saved enough for a down payment (matched by Community HousingWorks) on a two-bedroom, two-bathroom condo. Little by little, she reached her goal of financial independence.

“I thought it was not a possibility for me...but I just had to push through.”
—Alicia
IT TAKES ALL OF US WORKING TOGETHER TO CREATE THE BUILDING BLOCKS FOR A GOOD LIFE.

United Way has a good habit of getting the right people in the room. Project 25, our unprecedented partnership with the city and county of San Diego, illustrates our unique role: Many organizations have similar goals, but no collaborative entity to get things moving in a cohesive way. That’s where we come in. Other organizations have often turned to us to make the connections that give everyone a seat at the table. After more than 90 years’ practice, we know something about what makes successful partnerships among public and private sectors, for profit and non profit, experts and everyday people.
THE CONTINUUM OF 21ST CENTURY SUCCESS:
CRADLE TO CAREER...AND BEYOND

City Heights Partnership for Children

This collaboration of residents, non-profits, philanthropies, businesses, and government organizations aligns on a common goal: to provide a network of supports for City Heights youth from cradle to college to career and beyond. This holistic approach, known as “collective impact” (see below) is led by Price Charities, United Way, The California Endowment, and the San Diego Unified School District, with support from other involved partners.

Chula Vista Promises Neighborhood

Over the next year, South Bay Community Services with support from other partner organizations – including United Way, Manpower and the Parker Foundation – will help revitalize the Castle Park neighborhood, reporting some of the city’s lowest test scores and household incomes 30% below the median.

Funding from United Way and other partners and businesses contributed to SBCS securing a $27.8 million, five-year grant from the U.S. Department of Education. The community-led plan will develop programs to support healthy child development, academic excellence and college-bound aspirations for the neighborhood’s students.

COLLECTIVE IMPACT:
A structured group of diverse organizations working towards a common goal, aligning their efforts and using agreed upon measures of success.
VOLUNTEER CHALLENGE

Kids spend only 20 percent of their time in school, so it’s important that they have extra support beyond the classroom. In 2011, United Way launched its Volunteer Challenge to recruit San Diegans as readers, tutors and mentors. Anyone with passion and commitment can help a young person achieve greater academic success. So far, more than 3,000 local volunteers have changed lives.

San Diego Charger Antonio Gates joined our Volunteer Challenge as our Team NFL representative, and committed to recruiting 3,000 more volunteers. Antonio went back to finish college at Kent State specifically to be a role model for kids on how important it is to finish school. Go Team Gates!
Jason Bune, Team NFL player rep, joined high school students Paloma Bermudez and David Diaz in representing San Diego at a Youth Empowerment Summit in Washington, D.C. last year, where they met with members of Congress to advocate on behalf of youth.

"You don’t get to experience such a feeling everyday and knowing that kids want to better themselves because of your help speaks volumes. Providing volunteer tutors and mentors for young children… it cannot get any better than this for our kids.”
—Jason

"I have nieces and nephews and I want to encourage them to do sports and stay in school and push themselves so they can go further in their lives.”
—David

"I help out with the freshman at my high school, so they can feel more confident and stay focused on school. It’s hard for some of them, so we give them support like a brother or sister.”
—Paloma
DAY OF ACTION
Helping Low-income Students Be the Heroes and Heroines of their own Summer Reading Adventure!

Every June 21, the longest day of the year, United Way joins with community partners, volunteers and workplace donors to make an impact on an issue we all care about. Last year we held a countywide book drive to collect summer reading books for low-income children. A virtual book drive generated enough donations to help thousands of young San Diegans begin to build their home libraries.

Why summer reading? Because students can’t afford to lose three months of reading proficiency, which puts them behind in grade-level reading, the number one predictor of high school graduation. Research shows that addressing summer reading loss is a key factor in making sure students enter fourth grade reading to learn, not learning to read.

“Bridgepoint Education is privileged to be a part of a project that advances youth leadership and encourages readership. It was wonderful to see everyone come together and support United Way and the San Diego community.”

—Charlene Dackerman
Senior Vice President of Human Resources
Bridgepoint Education

of San Diego third-graders aren’t reading at grade level. In some parts of the county, it’s as high as 72%
Many thanks to the sponsors, partners and supporters that helped us put 21,000 books into the hands of tomorrow's readers! Bridgepoint Education, Hutchens PR, Old Town Trolley, San Diego County Regional Airport Authority, Jacobs & Cushman San Diego Food Bank and US Bank.
THANK YOU TO OUR CORPORATE PARTNERS

We believe that every gift made to United Way makes San Diego better. When our community partners direct 100% of their gifts to our programs and initiatives, we’re able to make their dollars work harder to support our community. Unrestricted giving to United Way drives the community-wide change that is needed to solve problems at their root cause and allows us to deploy resources throughout the community where they can do the greatest good.

As San Diego philanthropist Malin Burnham puts it, “I have always contributed to the United Way without restriction and I encouraged others to do the same. They are the experts. They have the research and knowledge of our community to know how best to apply the funds. As a result, lasting change can be made where we need it most.”

**BEST PRACTICE WINNERS**

**BEST PRACTICE WINNERS**

<table>
<thead>
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<th>Best Campaign, Large Company</th>
<th>Best Campaign, Mid-Size Company</th>
<th>Best Campaign, Small Company</th>
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<tr>
<td><strong>ups</strong></td>
<td><strong>SAN ORG</strong></td>
<td><strong>PCL</strong></td>
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<tr>
<td>San Diego International Airport</td>
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<td>CONSTRUCTION LEADERS</td>
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<tr>
<td><strong>nliven</strong></td>
<td><strong>bridgepoint</strong></td>
<td><strong>systems</strong></td>
</tr>
<tr>
<td>San Diego International Airport</td>
<td>Best Campaign, New Business</td>
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**Investing in United Way Initiatives**

1. Solar Turbines
2. GEICO Direct
3. Costco
4. United Parcel Service
5. Nordstrom
6. AT&T
7. Target Stores
8. National Steel & Shipbuilding Co.
9. Kaiser Permanente
10. Hunter Industries
11. Enterprise Rent-A-Car
12. General Atomics
13. University of California, San Diego
14. Bank of America
15. Bridgepoint Education
16. Johnson & Johnson Pharmaceutical
17. Pratt & Whitney Aeropower
18. ITW Space Bag
19. County of San Diego
20. U.S. Bank
21. PCL Construction Services, Inc.
22. SeaWorld Adventure Park
23. Cubic Corporation
24. Eli Lilly Company
25. Macy’s
Bridgepoint Education gives a shout-out to young readers during Day of Action.
For more than 20 years, the Tocqueville Society has served as one of San Diego's community’s most prestigious, effective philanthropic organizations. Created by United Way in 1984 by the late James F. Mulvaney and named for French Historian Alexis de Tocqueville, the Tocqueville Society honors those who give an annual gift of $10,000 or more to United Way.

Pauline Foster and her late husband Stan Foster helped change the face of philanthropy in San Diego. In 1988, Pauline became the first-ever female Board Chair for United Way of San Diego County. Ten years later, she received the Alexis De Tocqueville Award to honor her extraordinary leadership and service to the community.

“As a Tocqueville Society member, I believe that giving directly to United Way is not just about making an annual donation; it’s about trying to make a difference. It’s about changing lives.”

—Pauline Foster

“As the organization continues to help solve specific community issues, Scott and I are delighted to reinvest and re-engage. This year, I’ve directed a portion of my gift to the newly established Women United Fund, which focuses on improving the lives of women and children in San Diego. This way, my support—along with that of other women in the community—gives voice to the issues that matter most to me.”

—Betsy McClendon

Tocqueville donor and supporter of the Women United Fund
## TOCQUEVILLE SOCIETY MEMBERS

### ~ La Table Ronde des Millions de Dollars ~

#### Lifetime Members
- Helen Copley *
- Jenny & Sid * Craig Lawrence M. Cushman ~
  - Cushman Family Foundation
- Terry Giles
- Debbie & Alan Gold
- Lee & Frank Goldberg
- Craig Grosvenor
- Joyce Grosvenor
- Melissa & Mark Grosvenor
- Rachel Grosvenor
- Joan & Irwin Jacobs
- Keith Johnson ~
  - Johnson Family Foundation
- Betsy Manchester

#### Tocqueville Society Donors~

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<tr>
<th>Amount Range</th>
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<tbody>
<tr>
<td>$250,000 - $499,999</td>
<td>“Papa Doug” Manchester</td>
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<tr>
<td>$100,000 - $249,999</td>
<td>Cushman Family Foundation, Debbie &amp; Alan Gold, Craig Grosvenor, Joyce Grosvenor, The Grosvenor Family Foundation</td>
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<tr>
<td>$50,000 - $99,999</td>
<td>Carol &amp; Pedro Cuatrecasas, Melissa &amp; Mark Grosvenor ~ The J. Mark Grosvenor Foundation, Howard Charitable Foundation, Katherine &amp; Jim Umpleby</td>
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<tr>
<td>$25,000 - $49,999</td>
<td>Anonymous, Catherine &amp; Phil Blair, Giang Do-Tien, Foster Family Foundation of the Jewish Community Foundation, Linda &amp; Mel Katz, Carol &amp; George Lattimer, Vivien A. Nelson Foundation ~ Robert T. Plumb, II</td>
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<tr>
<td>$10,000 - $24,999</td>
<td>Michael Allan, Terry &amp; John Babbitt, Anonymous, Dawn Beattie, Randy &amp; Barbara Beck, Marla &amp; Robert Bruning, Dr. Thomas Bumol, Roberta &amp; Malin Burnham</td>
<td></td>
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</table>

*Deceased*
The Women’s Leadership Council bid a fond farewell to outgoing chair Kristy Gregg after two years of remarkable leadership. She helped set the tone for this powerful network of San Diego women. This group of more than 100 members also got hands-on through volunteer projects that have included mock job interviews with youth, career coaching and inspiring younger women to community action through mentoring and hands-on leadership.

The newly established **Women United Fund** allows any United Way supporter to invest in the services, programs and projects that improve the lives of San Diego women and children. Recently, the first grantee, Community HousingWorks, was awarded $50,000 to expand their learning centers, which help develop children’s reading and study skills.

**Establishing the Women United Fund was only one of many accomplishments implemented under Kristy Gregg’s leadership as WLC Chair.**

**Steering Committee**

**KIRSTY GREGG** — Chair  
**MARLA BLACK** — Vice Chair  
**CHARLENE DACKERMAN** — Vice Chair  
**LINDA KATZ** — Board Liaison
Estancia La Jolla Hotel & Spa served as the perfect backdrop for WLC members and guests to celebrate the success of the past year and share aspirations for making positive change in the San Diego community.
Former NBC anchor Susan Taylor, flanked by Campaign Chair Jon Vance and President & CEO Doug Sawyer, emceed the 2012 Kickoff event, sharing our progress and honoring community leaders and supporters.

2011-2012
BOARD OF DIRECTORS

*RICHARD S. LEDFORD
Chairman, Board of Directors & CHA Board Representative: President
Ledford Enterprises, Inc.

MEGAN BAEHRENS
Federation Representative
Development Manager
San Diego Coastkeeper

RUBEN BARRALES
At-Large Member
President & CEO
San Diego Regional Chamber of Commerce

MARLA B. BLACK
At-Large Member
Senior Vice President and Region Manager
Union Bank of California

PHILIP C. BLAIR
Representative, San Diego Workforce Partnership Policy Board
Executive Officer
Manpower Staffing Services

RICHARD M. BREGMAN
At-Large Member
Market President
Bank of America Merrill Lynch Healthcare & Institutions – West

*REID CARR
Chair, Marketing Committee:
President & CEO
Red Door Interactive
*KEVIN CRAWFORD*
Chair, Education Advisory Committee
Fire Chief - Carlsbad Fire Department
City of Carlsbad

**JOHN S. HAWKINS**
At-Large Member & Representative,
Health Way Trust San Diego:
President
Cloud 9 Super Shuttle

**KRIS MICHELL**
At-Large Member
President
Downtown San Diego Partnership

**MARLA B. BLACK**
At-Large Member
Senior Vice President and Region Manager
Union Bank of California

**PHILIP C. BLAIR**
Representative, San Diego Workforce Partnership Policy Board
Executive Officer
Manpower Staffing Services

**RICHARD M. BREGMAN**
At-Large Member
Market President
Bank of America Merrill Lynch
Healthcare & Institutions – West

**REID CARR**
Chair, Marketing Committee:
President & CEO
Red Door Interactive

**KEVIN CRAWFORD**
Chair, Education Advisory Committee
Fire Chief - Carlsbad Fire Department
City of Carlsbad

**SHIRLEY HORTON**
At-Large Member
Director of Development
South Bay Community Services

**JOSEPH R. MISHRIKI**
At-Large Member
Regional President
Wells Fargo Bank
South San Diego Region

**KAREN HUTCHENS**
At-Large Member
President
Hutchens PR

**MARK C. PYDYNOWSKI**
At-Large Member
Community Volunteer

**GIL JOHNSON**
Alternative Representative, San Diego Workforce Partnership Policy Board &
At-Large Member:
President
Procurement Concepts, Inc.

**SHARON LEE RHODES**
At-Large Member
Dean, Economic Development
San Diego Community College District

**WILLIAM TRUMPFHELLER**
At-Large Member
President
Nuffer, Smith, Tucker, Inc.

**JOSEPH R. MISHRIKI**
At-Large Member
Regional President
Wells Fargo Bank
South San Diego Region

**KRIS MICHELL**
At-Large Member
President
Downtown San Diego Partnership

**GEORGE A. WILLIS**
At-Large Member
President
UPS, South California District

**GORDON WIENS**
At-Large Member
Senior VP & Credit Products Manager
Bank of America

**JONATHON E. VANCE, CFA, CPA**
Chair, Campaign Cabinet
Managing Director
MedDx Capital Advisors

**RICHARD M. BREGMAN**
At-Large Member
Market President
Bank of America Merrill Lynch
Healthcare & Institutions – West

**GORDON WIENS**
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Senior VP & Credit Products Manager
Bank of America

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At-Large Member
Regional President
Wells Fargo Bank
South San Diego Region

**WILLIAM TRUMPFHELLER**
At-Large Member
President
Nuffer, Smith, Tucker, Inc.

***MARTHA A. BISHOP**
Chair, Junior Board
Chief Administrative Officer
San Diego Zoo Global

**WILLIAM TRUMPFHELLER**
At-Large Member
President
Nuffer, Smith, Tucker, Inc.

**D. JAMES UMPLEBY**
At-Large Member
President
Solar Turbines, Inc.

**LINDA L. KATZ**
Chair, Tocqueville Society & Major Giving Committee:
Community Volunteer

**REBECCA SMITH**
At-Large Member
Vice President
San Diego Workforce Partnership

***ROBERT E. SMITH**
Chair, Finance Committee
VP Finance & CFO
General Dynamics NASSCO

**THOMAS A. LEMMON**
Labor Representative
Business Manager
San Diego County Building & Construction
Trades Council, AFL-CIO

***W. MARK LESLIE**
Immediate Past Chair, Board of Directors:
Vice President – External Affairs
San Diego AT&T

**GEORGE A. WILLIS**
At-Large Member
President
UPS, South California District

**RANDY C. FRISCH**
Chair, Public Policy Committee
President & Publisher
San Diego Business Journal

**MARY CRUZ**
Chair, Combined Health Agencies Board
Community & Multi-Cultural Relations Manager
Sharp Chula Vista Medical Center

***LINDA L. KATZ**
Chair, Tocqueville Society & Major Giving Committee:
Community Volunteer

**TOM B. BREDEN**
Executive Committee Member
President & CEO
Northrop Grumman

*Executive Committee Member*
GRANTS TO UNITED WAY OF SAN DIEGO COUNTY
(2011-2012)

WAL-MART: Earned Income Tax Credit services
BANK OF AMERICA: Earned Income Tax Credit services
BANK OF AMERICA: Income Voices Report
P&G: Pro Bowl Promotion
WELLS FARGO: Ending Homelessness Move-In Kits
LOCAL INITIATIVES SUPPORT CORPORATION: Income
TIGER VENTURES LLC: Ending Homelessness Move In Kits
INTERNAL REVENUE SERVICE: VITA Grant – EITC
WONG FAMILY FOUNDATION: Volunteer Challenge Grant
EDISON INTERNATIONAL: Income
LOCKHEED: Community Impact
UNION BANK: Earned Income Tax Credit services
THE CALIFORNIA ENDOWMENT: Homeless
US BANK: Community Impact

Labor Participation supports the annual campaign and provides emergency assistance to members of the community experiencing hardship. The Department of Labor Participation, AFL-CIO Community Services assists with food, rental deposits, prescription drugs, unemployment claims, and periodically with rent, mortgage and utilities.

Other Partnerships & Collaborations

EarthShare California, a network of 80 leading environmental agencies, creates sustainable communities, enhances environmental education and empowers individuals through volunteerism.

The Combined Federal Campaign, an annual fundraising effort for federal employees, includes military and civilian personnel working in San Diego County.

The California State Employee Charitable Campaign, gives employees the opportunity to raise money annually for nonprofit organizations. State employees in our county raised more than $327,000 this fiscal year.

American Indian College Fund supports tribal colleges and universities, offering access to scholarships, fellowships, leadership development and cultural and language preservation.

BECA Foundation encourages and empowers aspiring Latino students to pursue higher education by providing financial and moral support.

United Negro College Fund provides student scholarships, internships, faculty training and other support to historically black colleges and universities.

Partnerships

Combined Health Agencies (CHA) is one of United Way of San Diego County’s most important partners in our efforts toward stronger health and human services in our region.

CHA represents chapters of 24 local and national health organizations dedicated to providing community services, public and professional education and funding to support research.

Annually, these members agencies touch nearly one million people through client and community services, as well as public and professional education programs.
## 2011-12 FINANCIALS

### ASSETS

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<th>Asset</th>
<th>2012</th>
<th>2011</th>
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<tr>
<td>Cash and cash equivalents</td>
<td>$1,406,456</td>
<td>$1,051,699</td>
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<tr>
<td>Restricted cash</td>
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<td>$21,517</td>
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<tr>
<td>Short-term investments</td>
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<td>$9,673,143</td>
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<tr>
<td>Pledges receivable, net</td>
<td>$6,774,084</td>
<td>$6,572,228</td>
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<td>Accounts receivable</td>
<td>$128,383</td>
<td>$120,287</td>
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<tr>
<td>Prepaid expenses and other assets</td>
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<td>$95,687</td>
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<tr>
<td>Land, building, and equipment, net</td>
<td>$1,461,877</td>
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<td>Long-term investments</td>
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<td>$930,390</td>
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<td><strong>Total Assets</strong></td>
<td><strong>$19,993,670</strong></td>
<td><strong>$19,925,691</strong></td>
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### LIABILITIES

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<th>Liability</th>
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<th>2011</th>
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<td>Amount due to CHA</td>
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<td>Amount due to CFC</td>
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<td>Designations payable</td>
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<td>Allocations payable</td>
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<td>Line of credit</td>
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<td>Pension fund liability</td>
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<td><strong>Total Liabilities</strong></td>
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### Commitments (Notes 6, 7, 8, 11 and 12)

### Net Assets

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<td>Unrestricted</td>
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<tr>
<td>Permanently restricted</td>
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<td>$46,664</td>
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<td><strong>Total Net Assets</strong></td>
<td><strong>$11,005,726</strong></td>
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### Total Liabilities and Net Assets

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