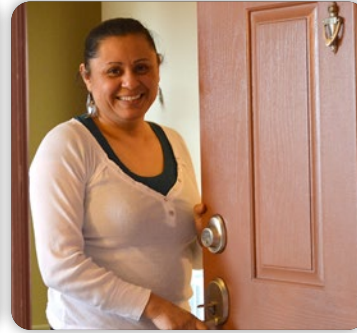




2012 ANNUAL REPORT



A young man with brown hair is smiling and looking towards the camera. He is wearing a white t-shirt with the words "LIVE UNITED" printed in bold black letters across the chest. On the left sleeve of the t-shirt, there is a small circular logo with a stylized 'L' and 'U' and the word "Community" below it. He is standing outdoors on a wooden pier or walkway. In the background, there is a body of water, a dark wooden railing, and a city skyline with several tall buildings under a clear blue sky. A tree trunk is visible on the left side of the frame, and some orange flowers are in the lower left foreground.

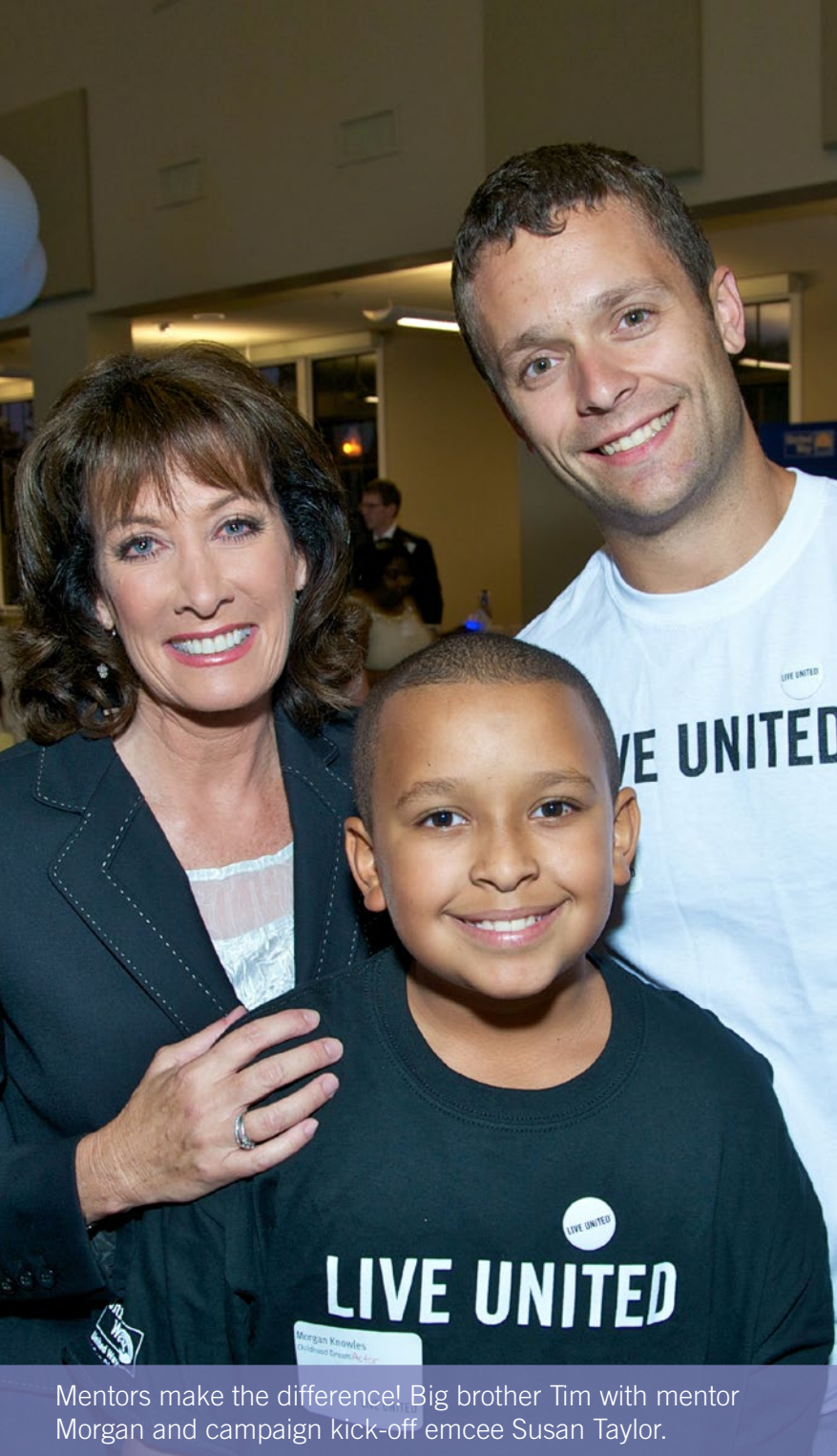
MISSION

To improve lives by mobilizing the caring power of the San Diego community.



TABLE OF CONTENTS

Opening Message	1-2
Stories of Lives Transformed	3-6
Project 25	3-4
Ways to Work	5
Bright Futures	6
Cradle to Career & Beyond	7-8
Volunteer Challenge	9-10
United Way Day of Action	11-12
Thanks to Corporate Partners	13-14
Tocqueville Society	15-16
Women's Leadership Council	17-18
2011-2012 Board of Directors	19-20
Grants & Partnerships	21
2011-2012 Financials	22



Mentors make the difference! Big brother Tim with mentor Morgan and campaign kick-off emcee Susan Taylor.

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.

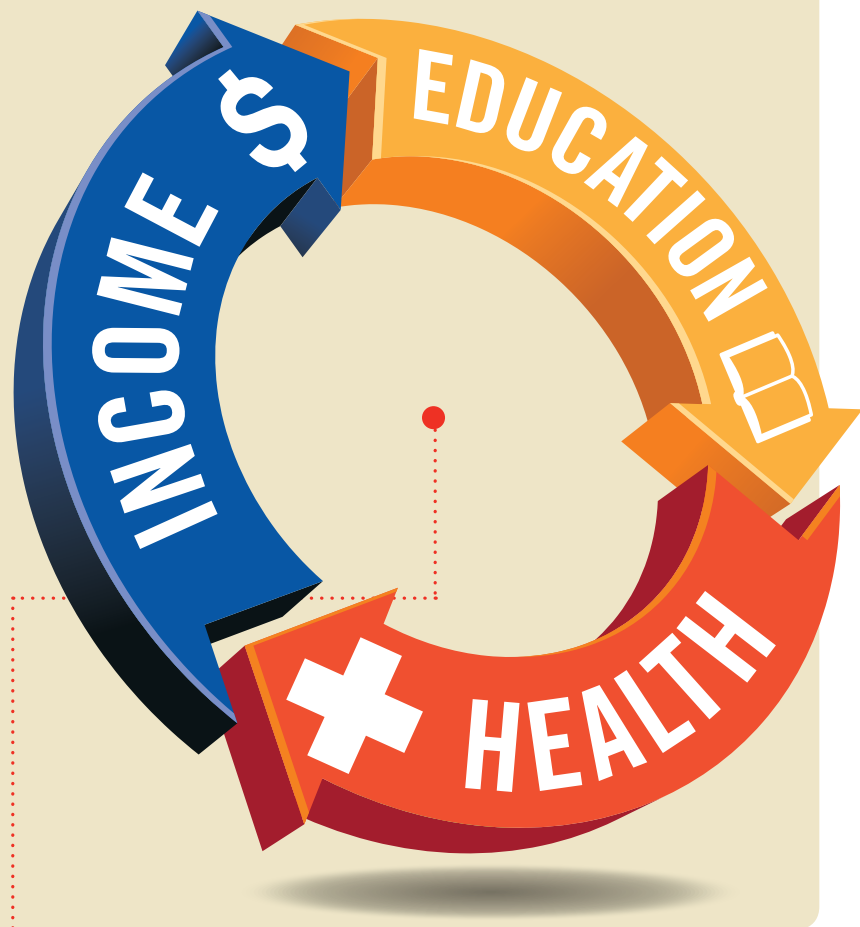
Everything we do, we do with the help of our community partners, volunteers and supporters. Learn how our collective efforts are aligning city officials, government, businesses, the public and the private sector toward a singular goal: making a better life for our neighbors and our neighborhoods, and for the next generation of San Diegans.

Doug Sawyer
President & CEO



Richard S. Ledford
Board Chair





We help San Diegans become financially self-sufficient so they earn enough to support themselves in a safe, stable home, live healthy lives and save for the future. Stable families means engaged parents, children who stay in school, learn and succeed—which means everyone in San Diego benefits.

LIVES TRANSFORMED. THESE ARE THE STORIES YOU HELPED WRITE.

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.



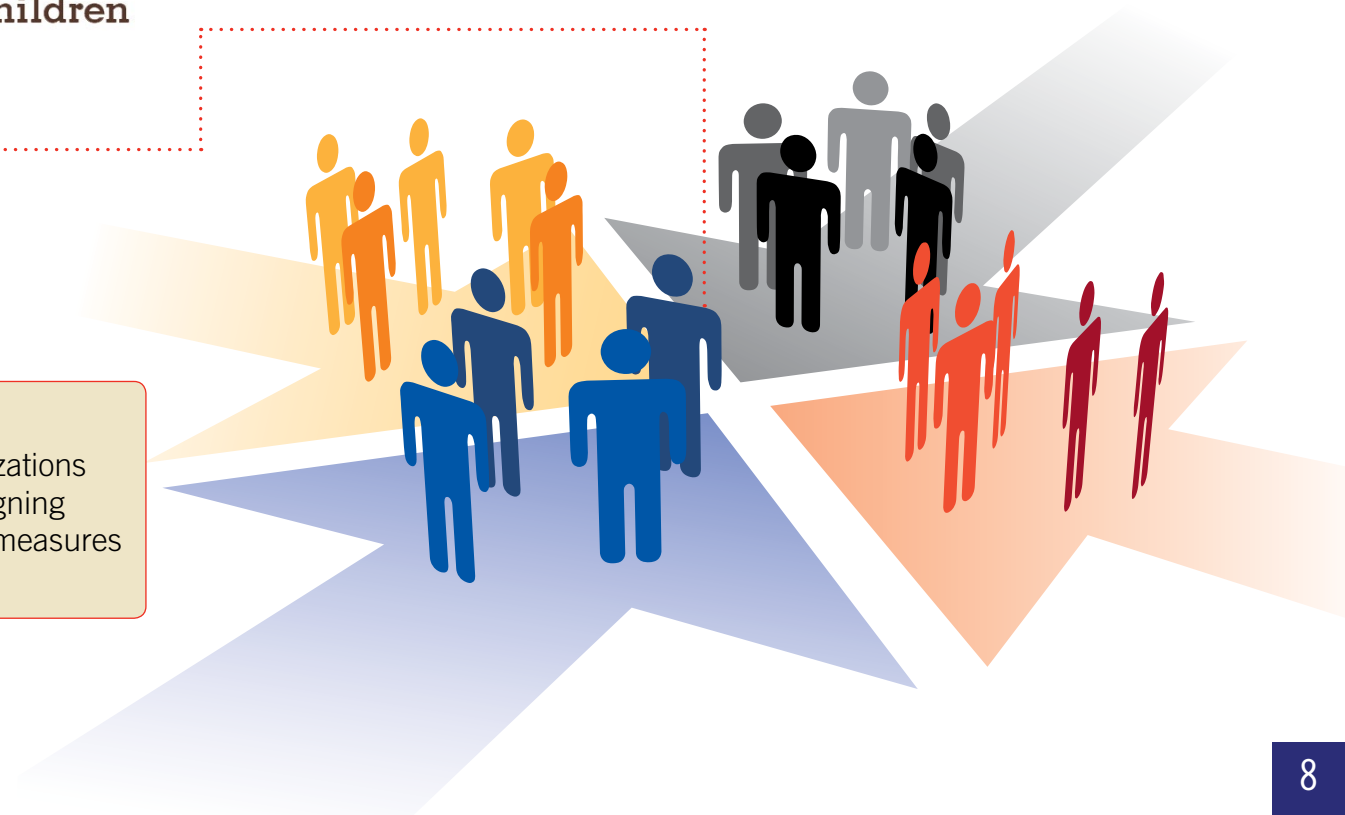
COLLECTIVE IMPACT:

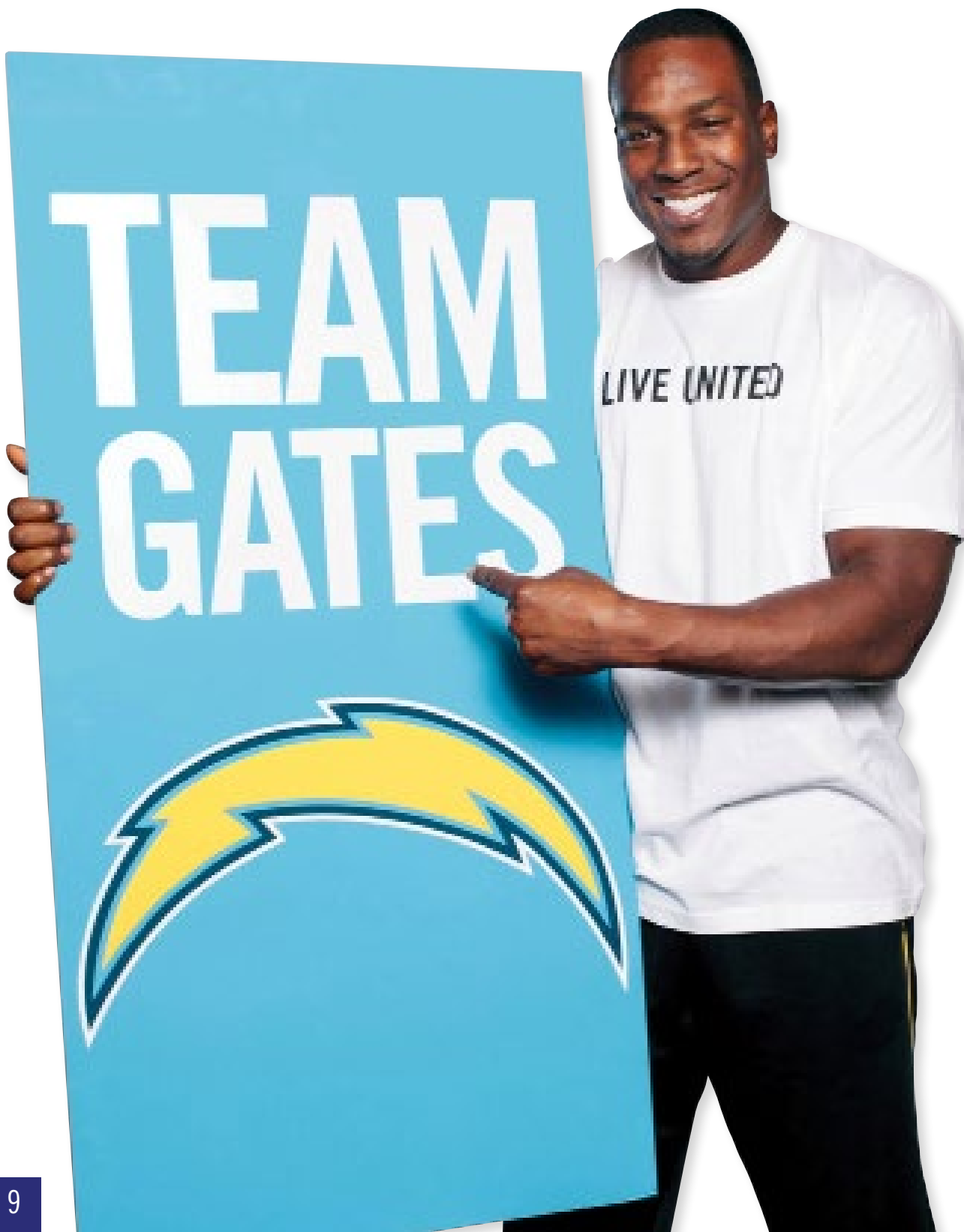
A structured group of diverse organizations working towards a common goal, aligning their efforts and using agreed upon measures of success.

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.





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.

“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.”

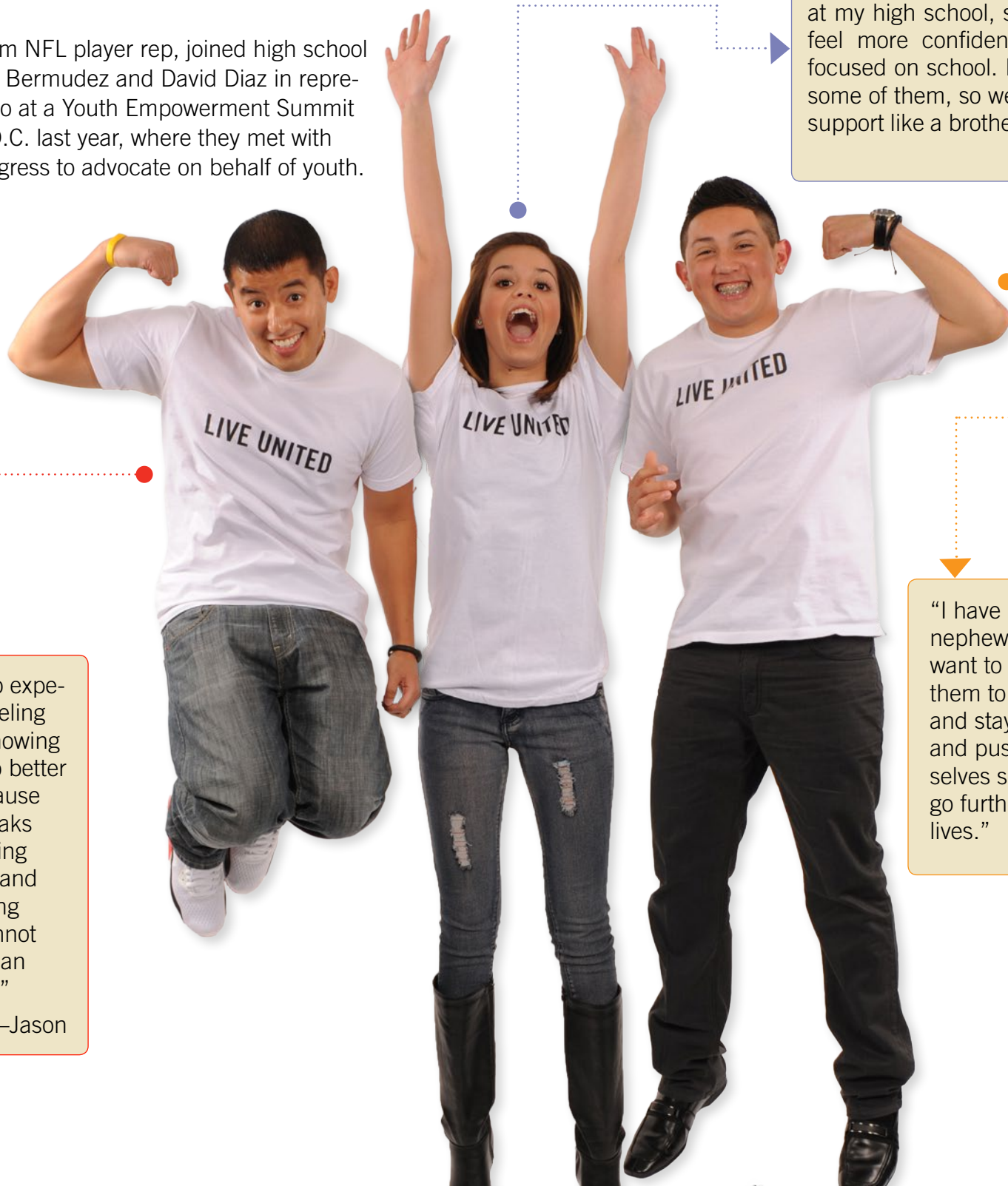
—Paloma

“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





of San Diego third-graders aren't reading at grade level. In some parts of the county, it's as high as **72%**

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



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.



BEST PRACTICE WINNERS



Best Campaign,
Large Company



San Diego International Airport

Best Campaign,
Mid-Size Company



CONSTRUCTION LEADERS

Best Campaign,
Small Company



Best Campaign,
New Business



Team Spirit Award

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."

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





TOCQUEVILLE SOCIETY

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



UNITED WAY OF SAN DIEGO COUNTY
TOCQUEVILLE SOCIETY



“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~

\$250,000 - \$499,999

"Papa Doug" Manchester

\$100,000 - \$249,999

Cushman Family Foundation
 Debbie & Alan Gold *
 Craig Grosvenor
 Joyce Grosvenor
 The Grosvenor Family Foundation

Rachel Grosvenor ~
 The Grosvenor Foundation
 Johnson Family Foundation *

\$50,000 - \$99,999

Carol & Pedro Cuatrecasas *
 Melissa & Mark Grosvenor ~
 The J. Mark Grosvenor Foundation
 Howard Charitable Foundation *
 Katherine & Jim Umpleby

\$25,000 - \$49,999

Anonymous *
 Catherine & Phil Blair *
 Giang Do-Tien
 Foster Family Foundation *
 of the Jewish Community Foundation
 Linda & Mel Katz *
 Carol & George Lattimer *
 Vivien A. Nelson Foundation ~
 Robert T. Plumb, II

\$10,000 - \$24,999

Michael Allan *
 Terry & John Babbitt
 Anonymous *
 Dawn Beattie
 Randy & Barbara Beck *
 Marla & Robert Bruning
 Dr. Thomas Bumol
 Roberta & Malin Burnham *

Mr. & Mrs. John Clift
 The Dahlberg Charitable Foundation *
 Thomas M. Davidson
 Pat & Dan Derbes *
 Ben Dillingham, III *
 Florence Nemkov
 & Dr. Bernard Eggertsen *
 Marilyn & Kim Fletcher *
 Katy Frankel
 Elaine & Murray Galinson *
 John M. Gilchrist
 Sarah & John Hawkins *
 Helm Fund *
 Mary & Ron Hendrix
 Karen & William Heroman
 Tim R. Holl
 Jan & Richard Hunter *
 Ann Hunter-Welborn
 & David Welborn *
 Natalie & Dale Kain *
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 Dee & Niki Krutop
 Lois & Rodney Lanthorne
 Wendy & Richard Ledford *
 Dr. Daniel Lee
 Jennifer & K. Alan Lonbom *
 Barbara Katz Maurais
 Jane & Tim McCarthy *
 Elizabeth & Scott McClendon *
 Diane & Robert Meade

Jodi & John Most
 Jim & Ruth Mulvaney Foundation *
 John Munroe
 Marilyn & Ken Nolen *
 Anonymous *
 Doug Regnier *
 Garry O. Ridge
 Rivkin Family Fund I *
 Irl R. & Clarice C. Robinson *
 Ted Roth Family Fund *
 Scarano Family Foundation
 Cecilia Scott-Stanfel
 & David Stanfel *
 Joseph Segoria
 The Sellick Family *
 Jan & Barry Sharpless *
 Anonymous *
 Jim & Gretchen Simpson
 Herbert J. & Elene Solomon
 Fund of the Jewish Community Foundation *
 Michele & Mark Stephens
 Anonymous
 Jan & Steve Sutton *
 Theobald Family
 Stephanie M. Truhlar, PhD
 Michael Verbeck
 Iris & Michael Villela
 Anonymous
 Chad Whitehead
 Mitchell R. Woodbury

*Deceased



We are pleased to recognize those donors who pledged 10% or more of their gift to United Way's work to improve the education, income and health of all San Diegans.



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

WOMEN'S LEADERSHIP COUNCIL

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.

Steering Committee

KRISTY 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

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Board Representative: President
Ledford Enterprises, Inc.

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Federation Representative
Development Manager
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City of Carlsbad

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Bridgepoint Education

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President & Publisher
San Diego Business Journal

***LORENA S. GONZALEZ**

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Secretary/Treasurer
San Diego/Imperial Counties
Labor Council

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Chair, Income Vision Council &
Women’s Leadership Council
VP/Community Affairs Manager
U.S. Bank – Southern California
LM-CA-K7

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Cloud 9 Super Shuttle

SHIRLEY HORTON

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KAREN HUTCHENS

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Hutchens PR

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Procurement Concepts, Inc.

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Chair, Tocqueville Society & Major
Giving Committee:
Community Volunteer

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Construction
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Regional President
Wells Fargo Bank
South San Diego Region

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At-Large Member
Community Volunteer

SHARON LEE RHODES

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Dean, Economic Development
San Diego Community College District

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At-Large Member
Vice President
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Chair, Finance Committee
VP Finance & CFO
General Dynamics NASSCO

WILLIAM TRUMPFHELLER

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Nuffer, Smith, Tucker, Inc.

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Managing Director
MedDx Capital Advisors

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President
UPS, South California District

MITCHELL R. WOODBURY

At-Large Member
Attorney-at-Law (Ret.)

DOUGLAS F. SAWYER

Staff
President & CEO
United Way of San Diego County

* 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

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.

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 non-profit 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.



United Way of San Diego County

Statement of Financial Position

June 30, 2012

(with Comparative Amounts for June 30, 2011)

2011-12 FINANCIALS

	2012	2011
ASSETS		
Cash and cash equivalents	\$1,406,456	\$1,051,699
Restricted cash	\$149,191	\$21,517
Short-term investments	\$9,091,242	\$9,673,143
Pledges receivable, net	\$6,774,084	\$6,572,228
Accounts receivable	\$128,383	\$120,287
Prepaid expenses and other assets	\$95,955	\$95,687
Land, building, and equipment, net	\$1,461,877	\$1,460,740
Long-term investments	\$886,482	\$930,390
Total Assets	\$19,993,670	\$19,925,691
LIABILITIES		
Accounts payable and accrued expenses	\$579,123	\$469,296
Amount due to CHA	\$193,942	\$196,730
Amount due to CFC	\$3,154,512	\$3,312,486
Designations payable	\$1,981,549	\$2,001,873
Allocations payable	\$2,650,998	\$1,072,516
Line of credit	\$95,029	\$86,291
Pension fund liability	\$332,791	\$780,639
Total Liabilities	\$8,987,944	\$7,919,831
Commitments (Notes 6, 7, 8, 11 and 12)		
Net Assets		
Unrestricted	\$10,495,967	\$11,498,316
Temporarily restricted	\$463,095	\$460,880
Permanently restricted	\$46,664	\$46,664
Total Net Assets	\$11,005,726	\$12,005,860
Total Liabilities and Net Assets	\$19,993,670	\$19,925,691

**GIVE. ADVOCATE. VOLUNTEER.
LIVE UNITED**



**STAY
CONNECTED**



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FOLLOW US ON TWITTER
[@liveunitedsd](https://twitter.com/liveunitedsd)