

ANNUAL
REPORT



2014



United Way
of San Diego County



WHAT DOES SAN DIEGO NEED?

San Diego needs a vibrant community where every child and family can succeed. We need books, safe places to live, regular doctor check-ups, caps and gowns, savings accounts, transportation, tax help, and more – everything it takes to make success possible.

Building on our 94-year foundation, United Way of San Diego County said goodbye to President and CEO Doug Sawyer after his nine years of fruitful service and welcomed new President and CEO Kevin Crawford.

This year we took our work in education, income, health and homelessness and integrated it to assist local children and their families, proactively supporting what they need to succeed from cradle to college or career. We expanded our “Collective Impact” work, unifying the resources of dozens of local partners to improve and enhance lives.

Through this Collective Impact work, United Way creates the infrastructure to make a true impact on the community. We often serve as the backbone, aligning the work of our many partners to best serve local families.

We’re tracking our success ... and it’s working! One of this year’s highlights was receiving a call from Vista Unified School District Superintendent Dr. Devin Vodicka. He heard about the progress we’re making with the City Heights Partnership for Children and wants to replicate it in Vista. We’re already well on our way – taking the best practices from City Heights and planting the seeds for a successful Vista Partnership for Children.



Kevin Crawford
President and CEO

Jon Vance
Board Chair

BECAUSE GREAT THINGS HAPPEN WHEN WE LIVE UNITED!

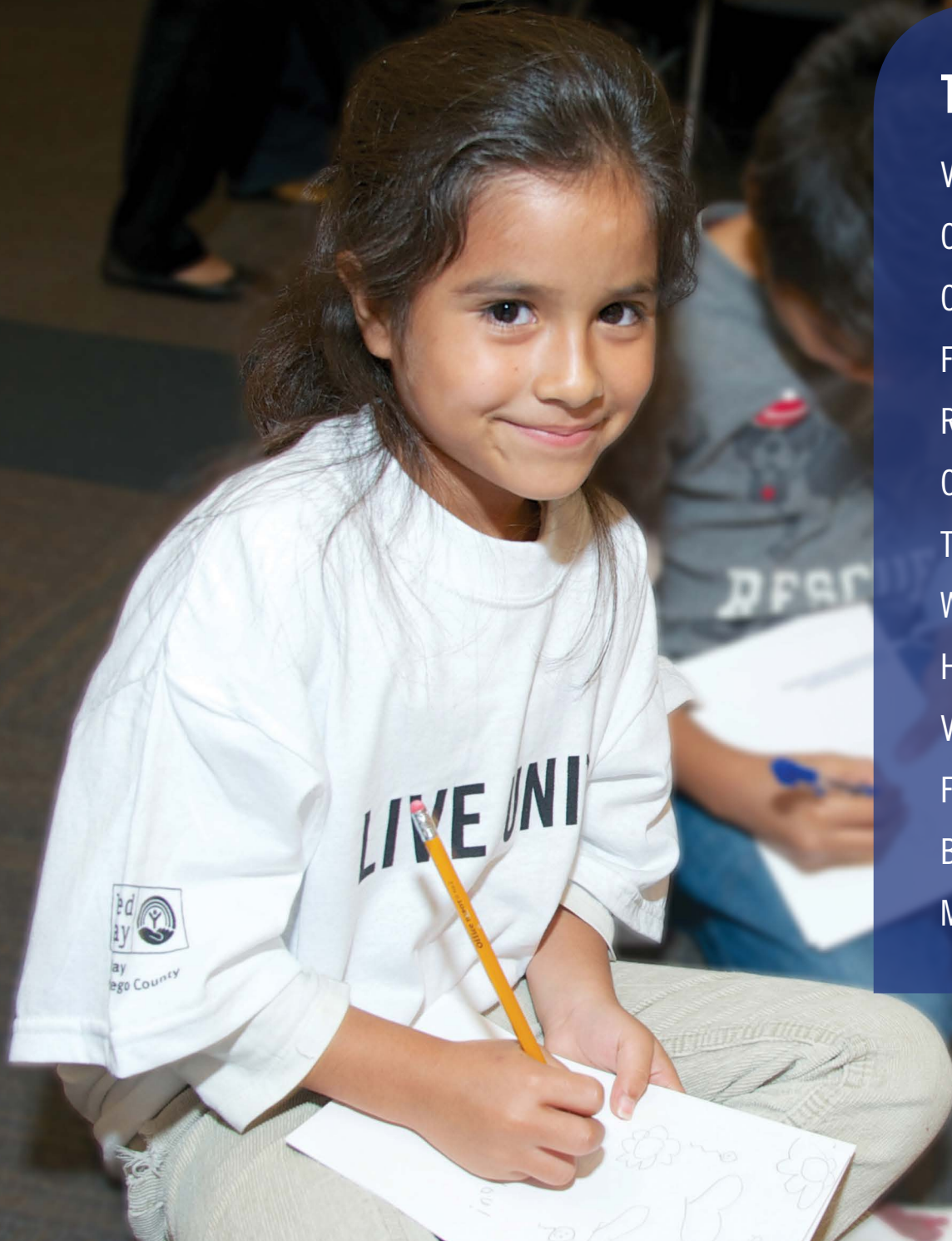


TABLE OF CONTENTS

Vision, Mission, Positioning.....	2
Collective Impact.....	3-4
Collective Impact in Action.....	5-6
Family Stability.....	7-8
Regional Progress Map.....	9-10
Corporate Donors.....	11-12
Tocqueville Society.....	13-14
Women's Leadership Council.....	15-16
Homeless Update.....	17-18
Volunteers for Change.....	19-20
Financials.....	21
Board of Directors.....	22
Moving Forward.....	24



United Way envisions a vibrant community built on opportunity for everyone.



To spark breakthrough community action that elevates every child and family toward a brighter future.



For community-focused San Diegans, United Way of San Diego County is a powerful unifying catalyst working to improve and enhance the lives of local children and their families.

COLLECTIVE IMPACT

**“We knit together
the great work
of various
stakeholders to
create a net that
supports children
and families in
the challenges
they face.”**

—Shaina Gross
SVP, Chief Impact Officer

Another buzzword? Not for us.

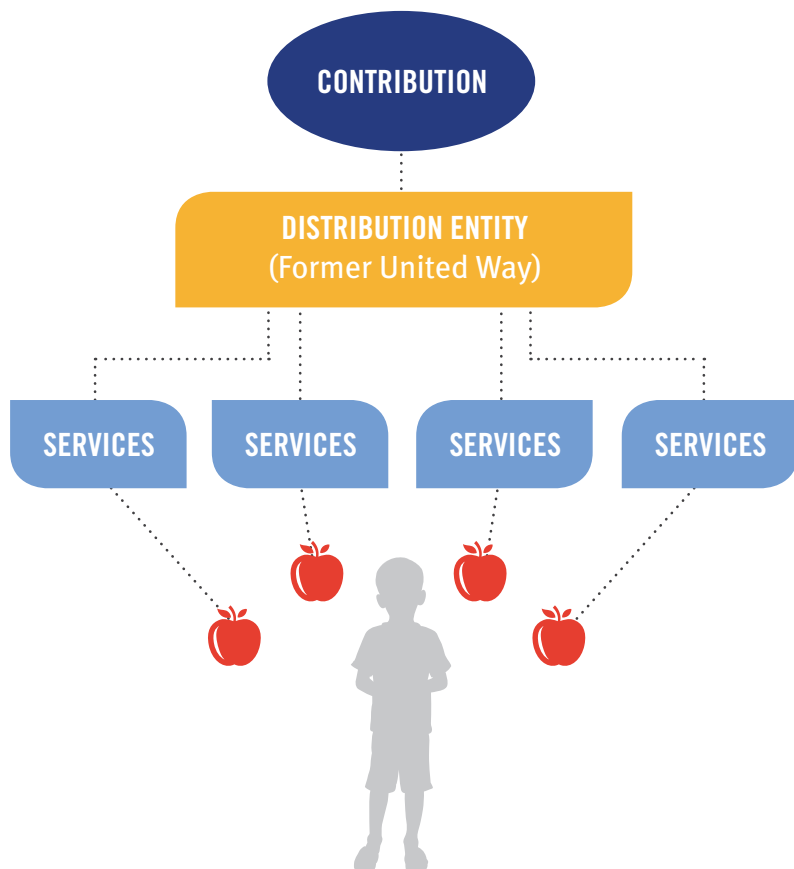
Collective Impact is the highest form of collaboration, and a proven, more effective framework for solving complex social issues.

By working with nonprofits, business and community leaders, city and county governments, schools and parents, United Way helps ensure every child is surrounded by the tools they need to succeed in life. Together, we collectively create the most focused, positive impact in our communities.

We are transitioning the majority of our work to the Collective Impact framework – unifying the resources of like-minded partners to improve and enhance the lives of local children and their families.

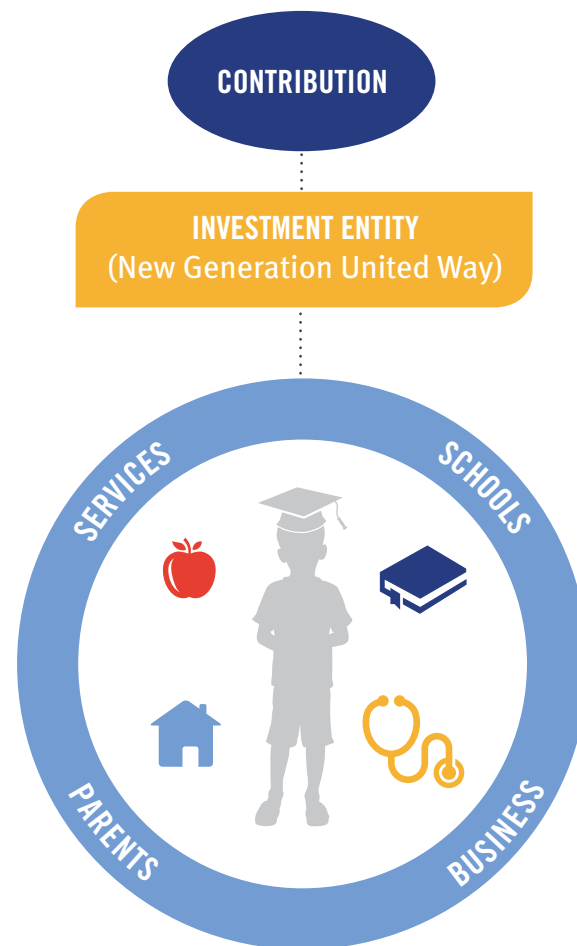


Traditional Pass Through Models



Traditional models don't provide the structure for coordination or communication and may lead to overlap or gaps in services.

Collective Impact Framework



Working within a Collective Impact framework, nonprofits, business and community leaders, government, schools and parents coordinate services to holistically serve the needs of a child for the long term.

What does this new framework mean for United Way of San Diego County?

It allows us to put our expertise to work, bringing the right people and right resources together to better elevate local children and their families to succeed today and in the future.

COLLECTIVE IMPACT IN ACTION



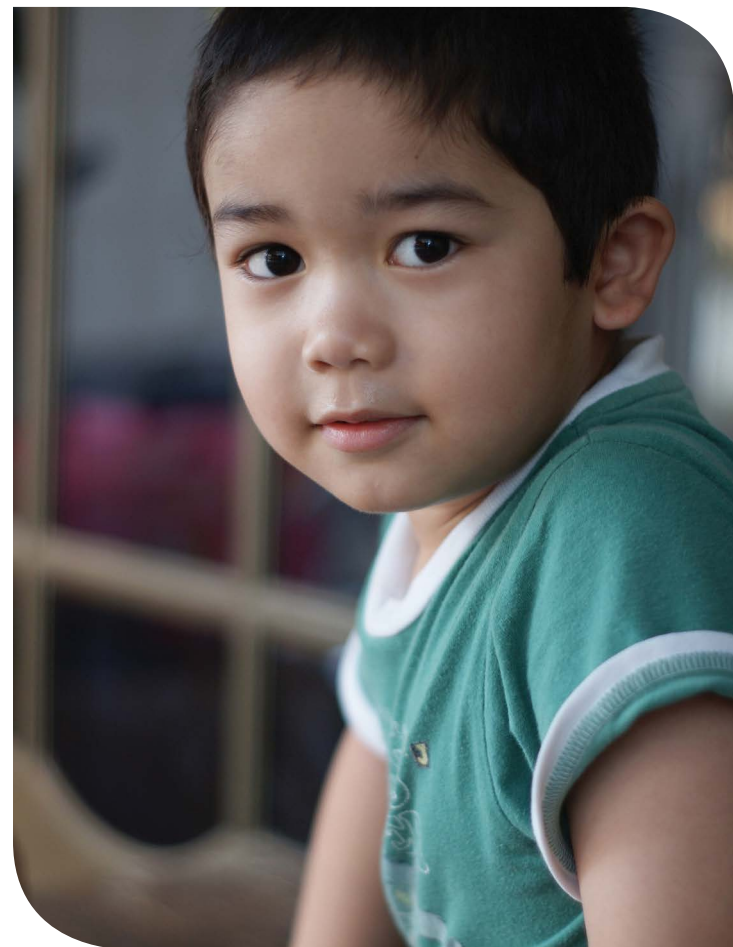
City Heights Partnership for Children

In 2011, the City Heights Partnership for Children began as an initiative of Price Charities to bring education, health and human services, families, nonprofit, business, civic, and philanthropic organizations together to help local children succeed.

In 2013, the Partnership for Children became part of United Way. We now act as the anchor entity – managing the project, measuring progress and facilitating work, while keeping everyone focused on the shared vision.

Getting Ready for Kindergarten

City Heights Partnership for Children found that students entering the 10 elementary schools that feed into Hoover High School often lacked basic literacy skills. So last spring and summer, 30 parent leaders (also known as *promotoras*) engaged fellow parents to prepare their kids for kindergarten. By hosting workshops and delivering toolkits – with crayons, flash cards, books, magnetic letters and a daily workbook (available in multiple languages) – children started the school year ready to learn. The Partnership for Children will track the toolkits' impact to continuously improve their effectiveness.





Chula Vista Promise Neighborhood

Our Collective Impact efforts also include Escuelita del Futuro, a 40-student preschool United Way helped fund through Chula Vista Promise Neighborhood. A specialized curriculum supports English Language Learners, and teachers make home visits to involve parents in their child's learning.

197% increase in English language development

119% increase in language and literacy development

133% increase in social and self-development

“My kids are more confident in reading and talking... their comprehension is really coming along!”

—Dawn Savang
Chollas-Mead Third-grade teacher

Diamond Educational Excellence Partnership (DEEP)

In the Diamond Community of Southeast San Diego, we're investing in Chollas-Mead Elementary, Johnson Elementary and Horton Elementary to boost early reading and writing skills. Principals and teachers received training and more than 500 home learning toolkits were distributed to families.





Running Readers Administrator and Women's Leadership Council member Shakira Williams, flanked by sons Michael and Reuben.

SUPPORTING FAMILY STABILITY

At United Way, we do everything we can *outside* the classroom so when a child gets *inside* the classroom, they are ready to succeed. Here are some of the ways we helped fill the gaps where San Diego's families needed extra support.

Earned Income Tax Credit (EITC)

United Way continues to lead the Earned Income Tax Credit (EITC) Coalition, offering free tax preparation to local families and individuals who work hard, but fall short. We've increased the use of free tax services throughout the county in 2013.

- \$10.5 million tax credits returned to the community
- \$3.6 million back to San Diego parents from the Child Tax Credit
- Over 3,447 households screened for additional benefits



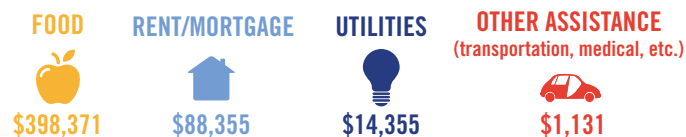
Ways to Work

United Way and The Leichtag Foundation continued to fund Ways to Work, an economic empowerment program run by Community Resource Center and Jewish Family Service. The program provides financial education and short-term, affordable car loans to working families with challenged credit histories. This helps families and their children get to work, school, child care and medical appointments.

- 90 families with poor credit provided with low-interest car loans
- 514 individuals received financial self-sufficiency training

Department of Labor Participation

United Way's Department of Labor Participation supports San Diego's union members and their families, as well as other struggling working families. A "safety net" of emergency assistance – including rent and mortgage assistance, food, and utilities support – helped nearly 5,000 individuals and their families stay stable during difficult times.



GREAT THINGS HAPPEN WHEN WE LIVE UNITED

Highlights of the places where we're changing lives and communities...



274

parents learn to support their child's development



30

promotoras (community leaders) taught parents to be their child's first teacher



9

schools offer parent workshops



8,734

adults call 2-1-1 for skills training



1,000

fewer absences in schools with attendance interventions



90

low-interest car loans issued with financial literacy classes



514

adults take financial literacy classes

- North County
- City Heights
- Central San Diego
- Diamond Communities
- Chula Vista



1,100
families receive
literacy toolkits



431
parents support
literacy through
after school
reading programs



8
medical clinics
offer family
reading centers
& screenings



500
students receive
literacy packets
to use at home



40
new students
a year join
preschool

COUNTYWIDE EFFORTS



\$10.5M
returned to the
community in
Tax Credits



14,000
books distributed



48,500
tax returns
completed



15,000
families or individuals
get mortgage & utility
help, plus food & toys



CORPORATE DONORS

Thanks for making our work possible!

What this place needs is ... partners in the business world. Without our network of workplace campaigns and corporate partnerships, from companies of all sizes across San Diego County, we would not be able to help local children and their families. We thank these corporate partners for their contribution to a thriving community that benefits all.

Notably, more of our corporate partners and their employees than ever before are investing their dollars directly into the work we do (versus asking United Way to give it to other organizations), so that United Way can do more in the community and support key initiatives operating with maximum efficiency and effectiveness.

Impact Grants

Nellie Thatcher Perkins

Union Bank

U.S. Bank

**United Way Worldwide/
Robert Wood Johnson**

Corporate Partners

Our Workplace Campaign participants are passionate, dedicated and engaged. To the top workplace campaigns of FY 2013-2014: San Diego thanks you!

Top Ten Partners – UWSD Direct Investments

1. Solar Turbines
2. GEICO
3. Costco
4. United Parcel Service (UPS)
5. Enterprise Rent-A-Car
6. Nordstrom
7. AT&T
8. Target Stores
9. Hunter Industries, Inc.
10. National Steel and Shipbuilding Company

Top Ten Partners – Overall Giving

1. Solar Turbines
2. AT&T
3. Hewlett-Packard Company
4. Bridgepoint Education
5. Costco
6. GEICO
7. Wells Fargo Bank
8. United Parcel Service (UPS)
9. County of San Diego
10. Enterprise Rent-A-Car

TOCQUEVILLE SOCIETY



The Alexis de Tocqueville Society, one of San Diego's most prestigious and influential philanthropic affiliations, is for those committed to creating true, positive change at the highest level.

Members invest at least \$10,000 annually, with a minimum of 10% directly to United Way, providing sustained funding that helps solve our community's greatest challenges.

For those interested in making an even bigger impact on the community this past year, longtime Tocqueville Society member Malin Burnham began the "Malin Burnham Challenge". Tocqueville members rose to the challenge, investing an additional \$200,000 in United Way's work, which serves the holistic needs of local children and families for the long term.

"United Way builds networks of resources throughout the County, including literacy for children and centralizing services for the homeless. Giving directly to United Way is a great way to contribute to the whole community's success."

—Ann Hunter-Welborn
Tocqueville Society Member
Board Chair, Hunter Industries



In June 2014, the challenge was met and Burnham personally matched it, dollar-for-dollar!

~ MILLION DOLLAR ROUND TABLE ~

Lifetime Members

Helen Copley*
Jenny & Sid* Craig
Cushman Family Foundation
Terry Giles
Debbie & Alan Gold

Lee & Frank Goldberg
Craig Grosvenor
Joyce Grosvenor
Melissa & Mark Grosvenor
Rachel Grosvenor
Joan & Irwin Jacobs

Johnson Family Foundation
Betsy Manchester
“Papa Doug” Manchester
Tim & Jane McCarthy
Deborah Szekely

2013/2014 TOCQUEVILLE SOCIETY DONORS

\$100,000 - \$249,999

Roberta & Malin Burnham
Cushman Family Foundation
Debbie & Alan Gold
Johnson Family Foundation
“Papa Doug” Manchester

\$50,000 - \$99,999

Kevan Bradshaw
Carol & Pedro Cuatrecasas
Rod & Diane Dammeyer
Giang Do
The J. Mark Grosvenor Foundation
Howard Charitable Foundation
Tim & Jane McCarthy

\$25,000 - \$49,999

Dr. Thomas Bumol
Galinson Advised Fund of the Jewish
Community Foundation
Hunter Family Advised Fund 🌿
Carol & George Lattimer
Stephanie Truhlar & Andrew Eaton
Richard P. Woltman

\$10,000 - \$24,999

Chris Allen
Mr. & Mrs. Joe Bear
Randy & Barbara Beck
John Begley
Craig Brown
Robert & Marla Bruning
Mr. & Mrs. John Clift
Joy & Ken Dahlberg
Ben Dillingham III
Eileen Drake
Daniel Ebbling
Florence Nemkov & Dr. Bernard J.
Eggertsen

John Faulkner
Kim & Marilyn Fletcher
Foster Family Fund of the Jewish
Community Foundation
The Frankel Family
The Grosvenor Family Foundation
Karen & William Heroman
Tim & Erin Holl
Mike Howard
The Hull Family
Greg & Wendy Hunter
Dale & Natalie Kain
Anthony Keathley

Dan & Sherri Kleeburg
Dee & Niki Krutop
Jennifer & K. Alan Lonbom
Betsy & Scott McClendon
Joe & Sarah Mishriki
John Munroe
Judson Quiggle
Doug & Denise Regnier
Rivkin Family Fund I
Lynne & Glenn Rossman 🌿
J. Michael Sauder
Cecilia Scott-Stanfel & David Stanfel

Jan & Barry Sharpless
Dr. Bhasker V. Shetty
The Elaine Galinson & Herbert Solomon
Donor Advised Fund of the Jewish
Community Foundation
Michael & Natalie Verbeck
Iris & Michael Villela
Ken & Lynn Weixel
Chad & Sarah Whitehead
Michael Whitton
Mitchell R. Woodbury
Doug & Stevie Younkun

🌿 Gifts made through The San Diego Foundation

* Deceased

For further information, please contact Director of Philanthropy
Katie Sawyer at 858.636.4162 or ksawyer@uwsd.org.

Roster current as of 2/1/15

WOMEN
UNITE!



United Way's Women's Leadership Council

(WLC) had a banner year! This group of passionate San Diego women, who offer their time, talent and financial resources to improve lives countywide, grew its membership and invested more funds than ever before.

With members from all major industries in our community, WLC is focused on building a vibrant community of empowered and educated women and children. This powerful network of women drives change by making important investment decisions and advocating for San Diego families. By investing and volunteering, WLC has been able to:

- Further early-grade literacy by supporting Running Readers, helping nearly 400 parents and children enjoy Family Literacy nights.
- Offer career mentoring for at-risk teenage girls at a live-in juvenile detention facility.
- Provide toys and household items to pregnant, at-risk teens and single moms with children under five.
- Organize monthly speaker series for teens who will be the first in their families to attend college.



2013-2014 Executive Committee

WLC Chair & United Way Board Member

Charlene Dackerman
Bridgepoint Education

Vice Chair, Membership and Recruitment

Lulu Hsu
Solar Turbines (retired)

Vice Chair, Engagement

Hanna Toman
JET Wealth Advisors



HOMELESS UPDATE

What this place needs is... more help for the homeless.

As San Diego County continues to grapple with homeless issues, United Way will spend the next three years building a community infrastructure to serve as the backbone for the county's efforts.

To begin with, we're continuing to bring resources together to tackle housing issues. We're identifying the strongest organizations to accelerate an end to homelessness and will support their efforts as long as needed.

Sustaining Project 25

When United Way launched the Project 25 pilot program, modeled after successful "Housing First" programs that provide permanent supportive housing to the chronically homeless, the goal was to help 25 people. After the pilot's success, housing 35 chronically homeless individuals and saving millions of taxpayer dollars, United Way provided bridge funding to help St. Vincent de Paul Village oversee Project 25. The project has now found sustainable funding and is expanding.



Anchoring Funders Together

United Way anchors "Funders Together to End Homelessness-San Diego," the new name for the San Diego Grantmakers' Homelessness Working Group. We oversee a dedicated staff member, as well as facilitate strategic investments and monitor grant making and results. Together, we have pooled funds, gathered over \$800,000 and have begun distributing them.



Funders Together Members

Alliance Healthcare Foundation

BFT Equity Partners

La Jolla Coin Shop

Leichtag Foundation

McCarthy Family Foundation

Parker Foundation

San Diego Housing Commission

United Way of San Diego County



Since first forming, Funders Together has already seen great success. (From left to right) Karen Brailean (FTEH-SD), Jeffrey Gering (VA Medical Center), Teresa Grenawalt (Veterans Community Services), Michael McConnell (FTEH-SD), Ben Jaramillo (formerly homeless veteran), Nancy Sasaki (FTEH-SD), Kevin Crawford (FTEH-SD/UWSD)

VOLUNTEERS FOR CHANGE

Day of Action

What this place needs is more dog-eared books! For the third year, United Way's Day of Action gave families summer reading books for their kids.

United Way bought and collected more than 14,000 books for children from low-income families. This year's bilingual books also helped kids focus on healthy eating: "Growing Vegetable Soup"/ "A Sembrar Sopa de Verduras" and "Farmers Market"/ "Día de Mercado."

At The Jacobs & Cushman San Diego Food Bank, 100 local business leaders packed books and bilingual reading tips for parents. Volunteers from United Way's Education Vision Council and Women's Leadership Council, Boyer Moving, Car2Go, Dr. Pepper/Snapple Group, GEICO, Pratt & Whitney Aeropower, San Diego County Regional Airport Authority, and Target participated.

GEICO and its staff were eager to partner with and participate in United Way's Day of Action.

"GEICO is an avid supporter of improving children's educational initiatives, and this event fills a void in the community by providing needed resources in a fun-filled environment."

— LaDonna Bond
Regional Manager, Planning & Marketing



Our insightful **Education Vision Council** leadership supported our ongoing work in kindergarten readiness and third grade reading proficiency, critical foundations for academic success.

"I had an opportunity to help identify and support initiatives that have great impact on our community that will produce positive results now and into the future. A perfect example is the annual Book Drive and its long term impact on the lives of children."

— Ric Hovda
EVC Interim Chair

Pratt & Whitney Aeropower workers took advantage of their manufacturing experience to ensure a seamless, efficient book-stuffing process. From floor workers to senior leadership, the volunteers found the experience particularly rewarding, knowing that their efforts will represent the very first book for many children.

"It was a real pleasure having this opportunity to make a positive impact on children's lives in our community by encouraging them to read and continue learning during the summer."

— Tom Diot
Turbine Technician and Shop Lead



Annual Labor Toy and Food Drive

Every year, United Way and local union members join forces to support struggling families during the holidays. At the Annual Holiday Toy & Food Drive, teamsters bring truckloads of food and toys donated by union members to Qualcomm Stadium for distribution.

During the 2013 holiday season, 400 turkeys and fixings along with 1,200 toys were given to union families in need.

Our partnership with the San Diego and Imperial Counties Labor Council, AFL-CIO, also lets us coordinate local logistics for the annual National Association of Letter Carriers Food Drive, the largest one-day food drive in the country. Last year, 300,000 pounds of food went to local food banks, pantries and shelters.



“For over a decade, the partnership between the Labor Council and United Way has provided real support for working families in their time of greatest need.”

— Richard Barrera
Secretary-Treasurer
Labor Council

“We know that multiple hands always lighten the load. United Way is proud to partner with the Labor Council and looks forward to doing more of the same in the future.”

— Kevin Crawford
President & CEO
United Way of San Diego County

2013-2014 FINANCIALS

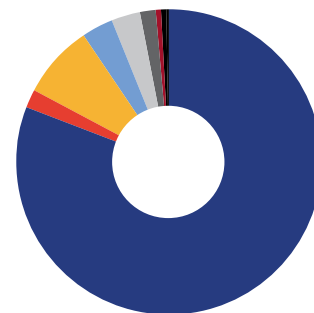
Statement of Financial Position, June 30, 2014

	2014
ASSETS	
Cash and cash equivalents	\$ 2,736,692
Restricted cash	103,424
Pledges receivable, net	5,702,560
Accounts receivable	121,639
Grants receivable	200,000
Prepaid expenses and other assets	66,810
Investments	9,712,751
Land, building, and equipment, net	1,396,688
Pension fund asset	129,070
Total Assets	\$ 20,169,634
LIABILITIES AND NET ASSETS	
Liabilities	
Accounts payable and accrued expenses	\$ 718,115
Amount due to Combined Health Agencies	244,201
Amount due to Combined Federal Campaign agencies	2,428,577
Designations payable	1,358,716
Allocations payable	2,177,810
Line of credit	83,433
Total Liabilities	7,010,852
Net Assets	
Unrestricted	12,500,169
Temporarily restricted	611,949
Permanently restricted	46,664
Total Net Assets	13,158,782
Total Liabilities and Net Assets	\$ 20,169,634

Revenue, Gains, and Other Support

77%	Current campaign year	\$15,161,612
2%	Prior campaign years	\$357,156
-3%	Less provision for uncollectible pledges	\$869,490
7%	Grants and contracts	\$1,456,032
3%	Unrealized gains on investments	\$641,414
3%	Contributions	\$542,796
2%	Investment income	\$301,596
1%	Service fees	\$147,545
1%	Other	\$111,153
	Designation from other United Ways	\$63,542
	In-kind contributions	\$31,431
	Miscellaneous income	\$16,180

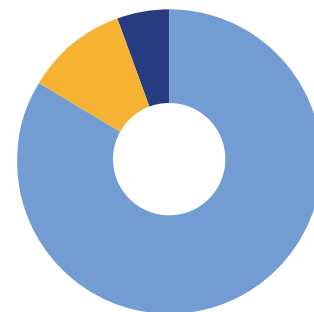
Total revenue **\$17,849,814**



Expenses

84%	Program services	\$14,423,213
	Funds awarded/distributed	\$2,538,752
	Donor designations	\$8,574,246
	Community impact & initiatives	\$2,911,407
	Labor community services	\$398,808
11%	Fundraising	\$1,863,608
5%	Organizational administration	\$924,621

Total expenses **\$17,211,442**



Change in net assets	\$638,372
Net assets beginning of year	\$12,520,410
Net assets end of year	\$13,158,782

2013-2014 BOARD OF DIRECTORS

“From across San Diego County, from public and private sectors, businesses and organizations large and small, United Way’s board is diverse and dedicated to continuing United Way’s long history as a leader in the San Diego nonprofit community.”

—Jon Vance
Chairman of the Board

Executive Committee

Chairman of the Board
Jonathon E. Vance, CFA, CPA
MedDx Strategy Partners, LLC

Past Chair, Board of Directors
& Chair, Nominating
Committee
Richard S. Ledford
Ledford Enterprises, Inc.

Board Secretary & Chair,
Women’s Leadership Council
Charlene Dackerman
Bridgepoint Education

Chair, Marketing Committee
Reid Carr
Red Door Interactive

Chair, Education Vision
Council (7/2013-1/2014)
Kevin C. Crawford*
City of Carlsbad

Chair, Campaign Cabinet
Karen Hutchens
Hutchens PR

Chair, Public Policy
Committee
Harold “Gil” Johnson
Procurement Concepts, Inc.

Chair, Tocqueville Society
Linda L. Katz
Community Volunteer

Chair, Finance Committee
Joseph R. Mishriki
Wells Fargo Bank -
South San Diego Region

Chair, Major Giving
Committee
Jacqueline L. Parks
U.S. Trust Bank of America
Private Wealth Mgmt.

Labor Representative
Richard Barrera
San Diego/Imperial Counties
Labor Council, AFL/CIO

Board of Directors

Federation Representative
Megan Baehrens
San Diego Coastkeeper

Laurie Berman*
California Dept. of
Transportation (Caltrans)

Marla B. Black*
Union Bank of California

Ignacio De La Torre*
AT&T – External Affairs

Primary Representative, San
Diego Workforce Partnership
Policy Board
Eileen Drake*
Pratt & Whitney Aeropower

Regina V. Evans*
Information Management
Resources, Inc. (IMRI)

Labor Representative
William Freeman
San Diego Education
Association (SDEA)

Chair, Income Vision Council
Kristan “Kristy” V. Gregg
U.S. Bank - Southern
California LM-CA-K7

Dale R. Kain*
PCL Construction
Services, Inc.

Labor Representative
Thomas A. Lemmon
SD Co. Bldg. & Construction
Trades Council, AFL-CIO

Chair, Combined Health
Agencies Board
R. Anthony T. Mahavier
R.A. Mahavier, A.P.L.C.

Omar Passons*
Stutz Artiano Shinoff & Holtz

Sharon Lee Rhodes*
San Diego Community
College District

Kian Saneii*
Independa, Inc.

Chair-Elect,
Women’s Leadership Council
Rebecca Smith*
The Eastridge Group

Alternate Representative,
San Diego Workforce
Partnership Policy Board
Jan Sutton*
Solar Turbines, Inc.

William C. Trumpfheller*
Nuffer, Smith, Tucker, Inc.

Chair, Audit Committee
Gordon Wiens*
Bank of America

Mitchell R. Woodbury*
Attorney-at-law (Ret.)

Staff

Douglas F. Sawyer
President & CEO
(7/2013-1/2014)
United Way of
San Diego County

**At-Large Members*



MOVING
FORWARD

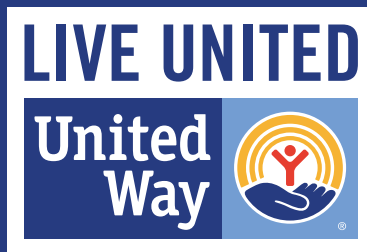
**Great things will happen when we
LIVE UNITED.**

We want to help every child in San Diego County succeed in life, ensuring they have all the resources they need. It takes a lot of organizations working together to make this work, and we help bring everybody to the table to drive large-scale impact.

We appreciate your support as we continue to make sure all our children are healthy, educated and well-nurtured from the time they're born until they graduate high school and move on to college or a career.

THANK YOU!





United Way
of San Diego County

**STAY
CONNECTED**



LIKE US ON FACEBOOK
facebook.com/unitedwaysd



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

4699 Murphy Canyon Road | San Diego, CA 92123 | 858.492.2000 | www.uwsd.org