Change the odds

2015-16 YEARBOOK
As the new President and CEO, Laurie came to United Way to build on its 96 years of disrupting the cycle of poverty and improving opportunities for children and families. This transformative organization–our board, staff, Laurie’s predecessor, Kevin Crawford, our community, business, and school partners have made a full-scale, all-in commitment to changing the odds for San Diego’s children.

What does that mean? All children deserve the opportunity to become whatever they want to be! Education is the gateway for them to discover the vast possibilities of what’s imaginable for their futures. Yet, thousands of children in our local communities never get that chance.

Many San Diego students in all parts of the county carry heavy burdens from challenging circumstances at home into the classroom. Myriads of disparities and challenges can determine a child’s future before he or she even enters kindergarten. We are working to solve these complex issues too many children face that prevent them from succeeding in school, starting in kindergarten, advancing through high school graduation, and going on to college or career. Our lens is focused on the children who are most in need and, who, without our efforts and those of our partners, would be left behind. We are motivated by the urgent needs of children and their families and passionate about moving the dial for children.

In the following pages we share our success stories from providing intervention and support outside the classroom that has led to impact inside the classroom: growing the number of students getting to school more often, reading more books, learning more skills for success, being introduced to local industries and businesses and so much more.

We are committed to working together with our partners in the school districts, the corporate world and with you in our local communities to invite every child to dream big. Now is the time to start making those dreams a reality. On behalf of our board of directors, staff, benefactors, partners, volunteers and the communities we serve, we invite you to join us.

Jacqueline Parks
SVP, U.S. Trust, Bank of America
Board Chair
Tocqueville Member

Rabbi Laurie Coskey, Ed.D.
President & CEO
United Way of San Diego County
Tocqueville Member
United Way is changing the odds for children through outcomes-based interventions, and community partner collaborations in City Heights, Vista and across San Diego County.

We believe all children deserve a strong start in life. We make that possible by empowering parents to be their child’s first teacher, improving the quality of their learning environments, and offering solutions to challenges outside the classroom, including attendance interventions, maintaining learning over the summer, and preparing high school students for viable, local employment. In support of stabilizing San Diego’s families in need, we provided emergency food, rent and utility assistance, and also facilitated 60 free tax-preparation sites to provide EITC and Child Care Tax Credit dollars for thousands of families, resulting in millions of refunds.

By investing in San Diego’s children and families—whether creating summer reading programs where tutoring increases the love of reading or by providing tens of thousands of books to low-income families so those reading scores don’t slip—we’re planting worlds of possibilities for future generations.

**MISSION + VISION**

United Way is at the center of multiple efforts with multiple partners offering multiple services. Imagine if our efforts were multiplied even more…

**Our Impact this Year**

- Community Reach: 116,698
- Donors Involved: 30,000
- Businesses & Partners Engaged: 993
- Schools: 168
FIRST IN CLASS

Salute to High Scores!

We excel at engaging diverse stakeholder groups and leading them to collaborative action. Our relationships in the corporate, government and nonprofit sectors are unparalleled, placing us in a unique position in the community to create long-lasting change. Last year’s efforts changed the lives of nearly 117,000 San Diegans. And we’re not stopping there…

We distributed 13,000 books to prevent summer reading loss (120,000 over the last 5 years) and aligned the efforts of 332 partners working together toward common goals, including serving 168 schools across the county.

CORPORATE PARTNERS

2,360 kids & families better prepared for kindergarten with quality preschools & involved parents.

8,643 students & families supported through early grade literacy efforts.

3,556 new work-based learning opportunities provided for high school & community college students.

Solar Turbines
GEICO
Costco

at&t
enterprise

San Diego International Airport

UPS
Target

Lilly

Pfizer

bridgepoint

Bank of America

CUBIC

General Atomics
AFFINITY GROUPS

Individuals who are committed to their community & United Way’s mission have enhanced the lives of local children while being good corporate citizens.

EMERGING LEADERS COUNCIL

A network of 100+ young professional community leaders representing nearly all industries in San Diego County. Members develop business and leadership skills while building a cross-industry network and hands-on volunteer experience.

WOMEN’S LEADERSHIP COUNCIL

Women take action, make change and create community. So when a network of caring, powerful women comes together to drive that change, anything is possible! United Way’s Women’s Leadership Council (WLC) makes a difference in the lives of women and children in San Diego County through grant-making, mentoring, leadership coaching & various volunteer, educational and networking events.

“I love that the WLC is like-minded women who really want to see the impact that they can make within their community.”
—Angel Mason Broadus
President, Puzzle Pieces Marketing

“I love that the ELC brings together like-minded people who influence the people in their lives and want to make an everlasting impact on our community.”
—Scotty Lombardi, Talent Acquisition & Organizational Development Manager
Hunter Industries, Inc.
This dedicated group of philanthropists has made United Way’s work possible for more than three decades, and they continue to rewrite the future of San Diego County philanthropy. The Tocqueville Society honors individuals deeply committed to creating change at the highest level through support of our most ambitious work.

“We’re involved because it gives us the opportunity to participate in measurable change. United allows us to focus on the end result of our involvement, and we can clearly see the impact of our participation.”

—Christina and Art Turner
Tocqueville members since 2015

TOCQUEVILLE SOCIETY

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Tocqueville members since 2015

ALEXIS DE TOCQUEVILLE SOCIETY

JULY 1, 2015 – DECEMBER 31, 2016

$300,000 – $249,999
Cushman Family Foundation
$250,000 – $249,999
Howard Charitable Foundation
$200,000 – $249,999
Conrad & Jennifer Kreutzer
Carol Ann & George W. Lattimer
Jane & Tim McCarthy
$150,000 – $199,999
Steve & Bonnie Gosselin
The J. Mark Grosvenor Foundation
$100,000 – $199,999
Rivkin Family Fund I
Stephanie Truhlar & Andrew Eaton
Michael & Natalie Givens
$50,000 – $99,999
Stephen & Alice Haines
Carol & Pedro Cuatrecasas
Giang Do
$40,000 – $49,999
Reid & Amy Carr
Richard Clingman
Rabbi Laurie Coskey, Ed.D.
Jolane & Kevin Crawford
Charlene Dackerman
Joy & Ken Dahlberg
Ben Dillingham III
David Dunn
John Faulkner
Kim & Marilyn Fletcher
Pauline Foster*
Kenn & Katy Frankel
Debbie & Alan Gold
Ka’eo & Jackie Griffin
Alexis & Heidi Guttierez
Christopher Hansen
Julie & Dennis Richardson
Lynne & Glenn Rossman
J. Michael Sauder
Carlos & Adriana Saenz & Dena Saenz
Joe & Rich Sparrow
Jeff & Karen Sprankle
Dr. Bhasker V. Shetty
Rebecca & Jimmy Smith
Elaine Galinson & Herbert Solomon
Melanie & Mark Stephens
Colin Thompson
Art & Christine Travers
Sue & Michael Villes
Ken & Lisa Weidenreich
Margie Wiles
Doug & phrase Wentz
21 Donors wish to remain anonymous

TOCQUEVILLE SOCIETY DONORS

Gifts made through the Jewish Community Foundation
Gifts made through The San Diego Foundation
*Deceased
At United Way, we fight for the health, education, and financial stability of every person in every community.

—Brian Gallagher, President & CEO
United Way Worldwide

Read Across America Day
Our new CEO’s welcome reception
Darrell Stuckey, San Diego Chargers + Family
Hometown Huddle
Readers in the Heights Graduation
Day of Action
SD Pride Parade
Annual Holiday Toy + Food Drive
Readers in the Heights field trip, SDPD Mid-City Division
Fall Celebration
At United Way of San Diego County we are driven to disrupt the cycle of poverty, provide resources for underserved San Diegans to become self-sufficient and create better lives for local children.

Crucial to breaking the cycle of poverty is graduating from high school, and fundamental to that is a solid academic start. That begins with our earliest learners—with help from a child’s first teachers, their parents—continuing with daily attendance and reading well by the end of third grade. Every step of the way along a child’s educational arc, United Way and its supporters are shoring up all the possible pathways to success.

Imagine a symphony...

...A collection of talented individual musicians, each playing a different instrument, from shared sheet music, with a conductor keeping them in sync to create a powerful sound. In our world, this symphony is composed of our partners, who all agree on a common vision, shared goals, and measurement.

United Way is the conductor of this symphony, bringing a collection of talented partners together to achieve greater impact for children than they could independently. Our role is to highlight what each partner brings to the symphony and then guide choices to make the entire symphony play in harmony.

Beginning with The City Heights Partnership for Children in 2012 and expanding north to The Vista Partnership for Children in 2013, United Way continues conducting symphonies of support and coordination between schools, government, nonprofits, businesses and community leaders, maximizing what each does best for a collective impact on our communities. Through these diverse and unique relationships, we have catalyzed the work of individual groups to be aligned, coordinated and focused for greater regional impact on what matters most: our kids’ success.
MEETING MAJOR EDUCATIONAL MILESTONES

Ready for Kindergarten

Last year, almost 2,500 children and families were served in the Ready for Kindergarten space, who otherwise would not have been reached by traditional services. We specifically sought out families who were using informal, in-home child care services because we know they often aren’t connected to many trainings and education opportunities. Not only were the providers given training to improve the quality of services they offered, but the children were also able to receive services they wouldn’t have otherwise.

Early Grade Literacy + 3rd Grade Reading

Two key components of reading proficiency by 3rd grade are attendance and combating the “summer slide” — those months when students lose some of the achievement gains they made during the previous school year. Our work with Every Student, Every Day resulted in our targeted students attending two more weeks of school — a huge increase. Over 70% of the students who started the year chronically absent showed improvement by year’s end.

For every day a student misses school, it takes them a day and a half to catch up. United Way interns work with the families of chronically absent students to dig into why children aren’t in class. Together with the family and the school, they create customized solutions, whether it’s getting families reliable transportation or helping them find a better apartment or where to get food. We think children should spend their time studying for a math test instead of worrying about challenges at home.

Hearing the Bell Before It Takes its Toll on Students

Summer slide is when students lose the reading progress they’ve made during the school year. During the summer break, many students aren’t being stimulated by intentional learning or reading, and they may not have books in their homes to practice. Since 2011, we’ve distributed over 120,000 books into the community so as many kids as possible have reading material over the summer.

Third grade is when students go from learning to read, to reading to learn. If a student’s reading skills aren’t up to par, they won’t be able to keep up and will quickly fall behind in many subjects. Research tells us third grade reading is an indicator of a child’s future: If kids aren’t reading at grade level by the end of third grade, they’re four times less likely to graduate high school on time.

“We need to work together: teachers, parents & children. We’re not just getting them ready for kindergarten. We’re getting them ready for their life.”

—Elizabeth Garza

Family Care Coordinator, Vista
COLLEGE & CAREER READINESS

Our teens must graduate with marketable skills—the skills our local businesses tell us they’re looking for. So it’s crucial that students get real-life work experiences. We help make sure that what the local business community needs new employees to know is the same as what skills our students are learning in our schools by coordinating 15 high school districts and 5 community colleges with local industry partners.

Last school year we supported the San Diego County College and Career Readiness Consortium which made 996 targeted outreach efforts to 81 business partners. These partners provided work experiences for high schoolers through 3,556 new work-based learning opportunities in three high-demand, high-wage industries.

For us, stable families mean kids have enough healthy food, a reliable place to call home that keeps them from the disruptions of constant moving or homelessness, stimulating environments to grow and play, emotional support by loving adults, positive relationships with neighbors and the community, and a feeling of safety. Nearly 50 percent of families with children in San Diego struggle to make ends meet and aren’t able to check all of those boxes of stability for their kids. That number needs to change.

One way United Way helps families gain stability is through California and Federal Earned Income Tax Credits (EITC). These credits for working families are some of the most powerful anti-poverty measures we have. Last year, the local EITC Coalition, led by United Way, prepared taxes for free for nearly 32,000 households, making sure they received all of the credits they deserved. Families can receive up to $6,000 in those credits, which they can use to pay bills, catch up on rent, fix their car or even start a college savings account for their children.
GIVING BACK: THE SECRET TO SUCCESS

Our volunteers are the bricks and mortar that hold our communities together. Their passion and perseverance inspire us to do better, go further, and reach higher. Many of our corporate and affinity groups have devoted weekends and evenings to support our schools — as role models, as readers in the classroom and improving spaces and places, inside and out.

Companies that volunteered with us:

- Deloitte
- GEICO
- UPS
- Lilly
- EY
- KPMG
- Thermo Fisher Scientific
- bridgepoint
- AMN Healthcare
- Symbiont
- FedEx
- Enterprise
- AT&T
- Affinity

By the numbers

# of volunteers: 650
# of hours: 2,654
Value of Volunteer Hours: $62,528.24

“There’s nothing better than spending the day with our youth, seeing the vigor in their eyes, sharing in their eagerness to learn and experience new things. They were so excited to accomplish a task and be rewarded with a book — how wonderful is that? Not a gadget or a toy, a book!”

— Tamara Trachsel, Account Manager, UPS
## FINANCIALS | JUNE 30, 2016

### Revenue, Gains, and Other Support

- **88%** Current campaign year $13,337,297
- **2%** Prior campaign years 312,942
- **2%** Less provision for uncollectible pledges ($350,763)
- **6%** Grants and contracts $891,773
- **1%** Unrealized loss on investments ($225,525)
- **5%** Contributions $700,841
- **2%** Investment income $247,184
- **1%** Service fees $97,263
- **1%** Other $98,961
- **8%** Designation from other United Ways $61,162
- **9%** In-kind contributions $26,163
- **1%** Miscellaneous income $11,366

**Total revenue** $15,139,745

### Expenses

- **85%** Program services $13,648,765
- **9%** Fundraising $1,529,046
- **6%** Organizational administration $943,944
- **Funds awarded/distributed** $2,179,236
- **Donor designations** $7,757,911
- **Community impact & initiatives** $3,351,926
- **Labor community services** $359,692

**Total expenses** $16,121,755

**Change in net assets** ($982,010)

Net assets beginning of year $11,319,208

Net assets end of year $10,337,198

1 Resulting largely from a one-time pension termination expense

### GRANTS

**Giving Exponential Potential**

Humbled and grateful. Two words we can’t say often enough when it comes to the generous funding we received in 2015-16. A heartfelt thank you to the companies, foundations, and organizations that understood our dedication to improving the lives of local children and their families.

**July 1, 2015–June 30, 2016**

Arthur P. & Jeanette G. Pratt Memorial Fund at Union Bank
Bank of America Charitable Foundation, Inc.
Bridgepoint Education CalEITC4Me, Golden State Opportunity
California Endowment Community Services Association of San Diego Unified School District
Depend
Samuel I. & John Henry Fox Foundation
Hologic Charitable Foundation
Kellogg’s
Molina Foundation
Nellie Thacker Perkins Foundation
San Diego Coin & Bouillon
Satterberg Foundation
San Diego County Office of Education
Siemer Institute for Financial Stability
Shater Bros. Charities
Texas Instruments
MUFG Union Bank Foundation
U.S. Bank Foundation
United Way Worldwide
Department of the Treasury – Internal Revenue Service
Wells Fargo Foundation
Xerox Foundation

According to Charity Navigator, organizations with $1 million in annual revenue should spend at least 75% of their budget directly on programs.

At 84%, United Way spends even more than what’s recommended on the programs we fund.

100% of your donation stays in San Diego to help children & families in need.
BOARD OF DIRECTORS

Richard Barrera
United Food & Commercial Workers Local 135

Laurie Berman
California Dept. of Transportation

Steve Bernstein
Wells Fargo Bank

Marla Black
Junior Achievement

Lindsay Burningham
San Diego Education Association (SDEA)

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Kathy Mock
Solar Turbines

Dr. Richard Pattenaude
Ashford University

Kian Sanei
Indapenda, Inc.

Megan Thomas
San Diego Grantmakers
Our big, bold, audacious resolution is to disrupt the cycle of poverty, provide resources for underserved San Diegans to become self-sufficient, and to create better lives for local children by illuminating pathways for future success that come through learning and succeeding in school.
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United Way
of San Diego County

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