



# ANNUAL REPORT

Dear Friends:

As Rich and I reflect on my first months as United Way's CEO, we recognize that this organization's work remains the same: supporting San Diego's children and families. We believe the need for this support has never felt more important.

Helping underserved San Diegans is at the core of United Way's work—as it has been for nearly a century. That effort is reflected in this report through the work we do every day, across the county, for hundreds of thousands of San Diegans.

Even though I've only been with United Way for a short time, I still have great admiration for the work accomplished on behalf of our region's children and families by a dedicated staff and our generous donors and volunteers.

At United Way, we believe that all children should have the chance to succeed in school and life, regardless of zip code or income. That aspiration is shared by many of our colleagues in the nonprofit community, but what sets us apart is the way we will accomplish that goal.

Our unique ability to bring together other community stakeholders to advance opportunity for our county's children drives us every day. We want to see those children succeed from cradle to career, and we want to know that families have the support needed to ensure their children's success.

Only by combining our efforts and aligning our goals will we see that success. That's why we believe in the power of collaborative community action.

Thank you for being part of that action and for your continued support as we move forward into a brighter future.



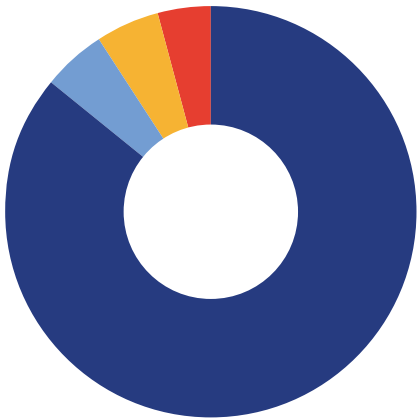
**Mission:** To spark breakthrough community action that elevates every child and family toward a brighter future.

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

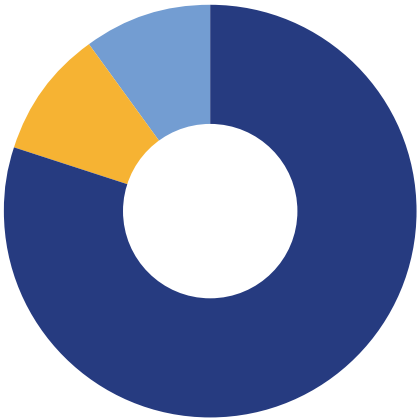
**Nancy L. Sasaki**  
President & CEO

**Dr. Richard Pattenau**  
Board Chair





(Fig.1)



(Fig.2)



Revenue, Gains, & Other Support (Fig.1)

86%	Campaign results net of losses	\$7,976,397
5%	Grants, contracts & contributions	\$459,549
5%	Net investment income	\$477,046
4%	Other	\$372,793
Total revenue		<u>\$9,285,785</u>

Expenses (Fig.2)

80%	Program services	\$6,926,136
10%	Fundraising	\$848,816
10%	Organizational administration	\$891,407
Total expenses		<u>\$8,666,359</u>
Change in net assets		\$619,426
Net assets beginning of year		\$10,830,189
Net assets end of year		\$11,449,615

# OUR IMPACT FINANCIALS



CORPORATE PARTNERS\*

Solar® Turbines  
A Caterpillar Company

Hunter®

ups

COSTCO  
WHOLESALE

GEICO®

enterprise  
rent-a-car  
We'll pick you up.®

GENERAL DYNAMICS  
NOSSCO

at&t

TARGET

\*Based on total donations directed to UWSD



GRANTS + FOUNDATIONS

- Ashford University
- Bank of America Foundation
- City of San Diego, CPPS
- Internal Revenue Service
- Kellogg's
- MUFG Union Bank Foundation
- Nellie Thatcher Perkins Foundation
- Pratt Memorial Fund
- San Diego County Community Enhancement Fund
- Samuel I. & John Henry Fox Foundation
- San Diego Gas & Electric
- Stater Bros.
- U.S. Bank Foundation
- Wells Fargo Foundation

PARTNERS. GRANTS + FOUNDATIONS



# SUCCESSFUL STUDENTS + STRONGER FAMILIES = A THRIVING SAN DIEGO COUNTY

**Our work helps ensure that children succeed from cradle to career, and families have supports needed to contribute to that success, regardless of zip code or income.**

In order to reach critical academic achievements, transition to college or career, and have stable, successful lives, all children, across the region, must have access to opportunities.

## EARLY GRADE LITERACY

### COMBATting SUMMER SLIDE

**In 2016-17, 49% of our County's 3rd graders weren't reading at grade level**, partially due to summer learning loss. United Way helps fight "summer slide" by coordinating partner efforts that provide high-quality literacy engagement strategies for greater impact. Now in its third year, our four-week literacy initiative, **Readers in the Heights**, offered summer enrichment opportunities to elementary students in City Heights, resulting in:

- **10,000** hours of literacy participation
- **900** books distributed
- **479** students participated
- **100+** days of programming
- **80** volunteers engaged in 200 hours of reading
- **65** staff trained
- **7** sites

**Partners:** San Diego Unified School District, PrimeTime, Words Alive, San Diego Public Library, San Diego Police Department, Traveling Stories, City Heights Community Development Corporation, Harmonium, Inc., Copley Price YMCA, Karen Organization of San Diego, United Women of East Africa

## ACHIEVING EVERYDAY ATTENDANCE

**Students who miss school regularly are 4X less likely to read at grade level**, severely impacting their learning and later academic success. United Way strengthened school attendance intervention strategies by helping teachers, administrators, nurses, and counselors use and apply data and best practices to improve daily attendance. Our **Every Student, Every Day** initiative identifies the barriers to daily attendance and helps resolve issues through referrals to needed resources. Last year, the impact of those efforts included:

- **\$35,700** recouped average daily attendance (ADA) dollars
- **7,200+** students and families increased attendance awareness
- **4,400** hours of support targeted to **274** children
- **670** more days of school students attended
- **18** interns from **4** universities served in **14** schools in both City Heights and Lemon Grove

**Partners:** San Diego Unified School District, Lemon Grove School District, San Diego State University, Point Loma Nazarene University, University of San Diego, UC San Diego, Alliant University, Cal State San Marcos, University of New England



# CRADLE TO CAREER



## COLLEGE & CAREER READINESS

According to the Center of Excellence for Labor Market Research, unless local workers get the skills the labor market needs, **more than 29,000 jobs in our County will remain unfilled in top middle-skill jobs every year**. Too many high school and community college students are not prepared to fill those positions, which blocks them from becoming self-sufficient. By facilitating the technology behind connecting students and teachers to local employers, United Way and our partners assisted high school and community college students to explore and experience the workplace, informing their decisions about the future and preparing them for college or career. The impact of those efforts includes:

- **23,626** work-based experiences
- **125** employers connected students to 3 high-wage, high-growth, high-demand industries
- **47** high schools & community colleges engaged
- **15** school districts engaged

**Partners:** Carlsbad Unified School District, Escondido Union High School District, Grossmont Union High School District, Fallbrook Union High School District, Oceanside Unified School District, Poway Unified School District, San Dieguito Union High School District, San Marcos Unified School District, Sweetwater Union High School District, Vista Unified School District, San Diego County Office of Education, San Diego Workforce Partnership, Junior Achievement, San Diego Regional Economic Development Corporation, Cleantech San Diego, Mira Costa College, Palomar College, San Diego Community College District, Grossmont-Cuyamaca Community College District, Southwestern College



# CRADLE TO CAREER



*Almost half of the county's children are living in households struggling to make ends meet. A sudden loss or emergency expense disrupts learning, increases absenteeism, and leads to student disengagement. Our support is critical to vulnerable families and children who need our help.*

United Way distributed resources and support to nearly 35,000 local families during tough times last year. Whether it was serving 3,700 individuals and families with emergency assistance for mortgage or rent, utilities, food, or tax-filing assistance for over 31,000 households—plus, enrolling those eligible for food-assistance programs, leveraged by our partnership with Health & Human Services—we supported children and families across the region.

## UNIONS UNITED

- **\$318,922:** Value of food distributed
- **\$92,726:** Rent & mortgage assistance
- **\$37,813:** Utilities assistance
- **\$376:** Transportation & medical needs
- **350** families received holiday meals & toys, distributed by **150** volunteers at Holiday Food & Toy Distribution
- **56** volunteers sorted **200,000 lbs** of food at “Stamp Out Hunger” Food Drive

**Partners:** San Diego and Imperial Counties Labor Council, AFL-CIO, San Diego Food Bank, Feeding San Diego



## EARNED INCOME TAX CREDIT (EITC) COALITION

- **\$40 million** in state & federal refunds returned to our county
- **31,092** households filed returns
- **8,244** filers claimed the Federal EITC, accounting for over **\$14 million** in refunds
- **61** free tax prep sites leveraged by the coalition
- **22** community & non-profit partners supported to implement taxes & referrals

**Partners:** Alliance for African Assistance, AARP, Building Skills Partnership, Community Resource Center, Council of Philippine American Organizations, County of San Diego HHSA-Community Action Partnership, Dreams for Change, Home Start, Inc., IRS Stakeholder Partnerships, Education and Communication (SPEC) office, Interfaith Community Services, International Rescue Committee, Legal Aid Society of San Diego, MAAC, San Diego City College, SAY San Diego, South Bay Community Services, San Diego and Imperial Counties Labor Councils



# FAMILY STABILITY



# TOCQUEVILLE SOCIETY

Members of the TOCQUEVILLE SOCIETY are dedicated philanthropists and community visionaries who give \$10,000 or more annually to United Way. Members enjoy exclusive events and meaningful opportunities to connect with those we serve. Last year, those included “Tocque Talks” with community leaders, a Thank-You event at the La Jolla Map & Atlas Museum, and various volunteer opportunities that gave members one-on-one contact with students in the classroom.



United Way of San Diego County  
Tocqueville Society

## LA SOCIÉTÉ NATIONALE (\$100,000 - \$249,999)

*Cushman Family Foundation  
David C. Copley Foundation*

## ORDRE D'ÉGALITÉ (\$50,000 - \$99,999)

*Alan & Debbie Gold  
Howard Charitable Foundation  
Greg & Wendy Hunter  
Conrad\* & Jennifer Kreutzer  
Carol Ann & George W. Lattimer  
Jane & Tim McCarthy*

## ORDRE D'LIBERTÉ (\$25,000 - \$49,999)

*Dr. Thomas Bumol  
Hunter Family Advised Fund  
Stephen & Bonnie Gosselin*

## MEMBRES DE LA SOCIÉTÉ (\$10,000 - \$24,999)

*Elizabeth Altman  
David & Marti Andrews  
Bear Family Fund  
Barbara & Randy Beck  
John Begley  
Stephanie & Stephen Brownell  
Edward Bryant  
Dave & Janice Carothers  
Amy & Reid Carr  
Richard Clingman  
Pedro & Carol Cuatrecasas  
Charlene Dackerman  
Joy & Kenneth Dahlberg  
Florence Nemkov & Bernard J. Eggertsen  
Kim & Marilyn Fletcher  
James Gergurich  
Wolfgang Glaesner  
Ka'eo & Jackie Griffin  
Christopher Hansen  
Marcia Foster Hazan  
Lulu & Andy Hsu  
Reese Jarrett & Regina V. Evans Jarrett*

*Johnson Family Foundation  
Bryan E. Jones  
Donmienne Leung  
Scott & Betsy McClendon  
Kenneth D. McEneaney  
David Pollock  
David Rhyne  
Rivkin Family Fund  
Randi Rosen  
Lynne & Glenn Rossman  
J. Michael Sauder  
Teresa & Paul Schrader  
Jan & Barry Sharpless  
Jeffrey Silberman & Karen Foster Silberman  
Elaine Galinson & Herbert Solomon  
Cecilia Scott-Stanfel & David Stanfel  
Stephanie Truhlar & Andrew Eaton  
Ken & Lynn Weixel  
Michael Whitton  
Gordon & Margie Wiens  
Donald Wilkins  
Doug & Stevie Younkin*

*\* Gifts made through the Jewish Community Foundation  
\* Gifts made through The San Diego Foundation  
\* Deceased*

For more information about the Tocqueville Society,  
please contact Lisa Kalal at 858.636.4162 or [lisa.kalal@uwsd.org](mailto:lisa.kalal@uwsd.org).

# A PHILANTHROPIC COMMUNITY



## WOMEN'S LEADERSHIP COUNCIL

The WLC (now known as Women United) is comprised of 127 powerful women driving change through cross-industry networking, professional development aimed to grow and strengthen one another, and volunteering in the community to enhance the lives of women, children, and families. This year, they celebrated their 10th anniversary and everything they've accomplished since the group's inception. This dynamic group of women has made a significant impact in San Diego! In total, the WLC has included 1,000 community-minded women investing over \$2 million in our community on behalf of women and children.



*"WLC is an amazing group of powerful women driving change in our community. Our annual gifts collectively fund educational initiatives that improve the lives of women and children in the San Diego Region. We truly see the impact of our philanthropic dollars at work through special initiatives and programs."*

—Sarah Thompson, Chair, WLC

*"I greatly appreciate the opportunity to serve on the Steering Committee for Emerging Leaders because it allows me to represent my organization in a professional, collaborative, and productive way. I learn so much from interacting with my fellow members—other young professionals from different companies and backgrounds, sharing experiences and insights on how we can make our community a better place."*

—Reana Shah, Chair, Emerging Leaders



## EMERGING LEADERS

Emerging Leaders is a dynamic network of 140 young professionals representing companies and industries across San Diego. Through volunteerism, networking, and professional development opportunities, Emerging Leaders have the chance to amplify the impact they have in the community. Just this last year, Emerging Leaders attended lunch events with prominent community leaders, learned about time management and interview techniques from professionals, how to leverage their LinkedIn presence, as well as read with students in local schools.

## VOLUNTEERS

**428** community members donated over **1,400** hours, valued at **\$33,796**, participating in projects ranging from sorting and distributing food to reading aloud to kids in classrooms to serving on committees and boards, giving their time and talents to support United Way and the communities we serve.



# A PHILANTHROPIC COMMUNITY



# EXECUTIVE COMMITTEE



Chairman of the Board  
**Rich Pattenaude, Ph.D.**



Vice Chair, Chair,  
Campaign Cabinet  
**Alexis S. Gutierrez, Esq.**



Past Chair  
**Jacqueline Parks**



Chair, Finance Committee  
**Jacob M. Richards**



Board Secretary  
**Charlene Dackerman**



Chair, Audit Committee  
**Gordon Wiens**



Chair, Marketing Committee  
**Reid Carr**

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# BOARD OF DIRECTORS



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**United Way  
of San Diego County**