



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



2015 Annual Report



We focus on the building blocks for a good quality of life
– education, financial stability and health.

Positioned for Impact

You may have heard about the transformation we are undertaking. This year marked the conclusion of a three-year funding cycle under our traditional model of allocating donations to specific partner agencies. We are proud of our record serving one out of three county residents but aspire to longer term impact. To achieve this we need to deploy multi-faceted and sustained interventions.

That's why going forward our investment strategy will involve long-term commitments from diverse sectors to a common, agreed-upon agenda designed to help hardworking families. Our goal is to mobilize volunteers, advocates and resources to achieve systemic change. Together, we'll transform our community for the better.

Three factors give us confidence in this transformation. First, we are actively engaged with and listening to our community. Secondly, we have data that identifies the

aspirations we share and robust partnerships that provide the means to success. Lastly, Community Impact is a tested model. Many United Ways have embraced this approach to deliver amazing results for their communities.

Listening to the Community

We're proud of the success of Impact Monterey County (IMC), a collaborative effort spearheaded by United Way to identify the most effective ways to improve life in our County. IMC successfully conducted a countywide assessment, in Spanish and English, to identify people's aspirations for themselves and their children. Participation centered on assets rather than deficits, revealing more similarities than differences among us. We heard our community's hopes regarding Education, Financial Stability, Health and Safety – the building blocks for a good quality of life – and we're poised for action.

Means to Success

Not only did IMC ask people for their aspirations, it reviewed existing data to create a comprehensive picture of the conditions present in Monterey County. This information is accessible on our website and available for all to use. IMC also helped UWMC strengthen its partnerships and lay the foundation for lasting change.

For example, in the area of Education, United Way is helping propel the Early Childhood Development initiative.

We're also playing a leadership role with Bright Futures, which seeks to foster better education outcomes for local students, from cradle to career, and improve the pipeline of local talent. IMC data has been a resource for these initiatives.



2015 Homeless Census

Community Impact

Our proven ability to act collaboratively and decisively in response to community need gives us confidence we can foster transformative, systemic change. For example, United Way was the driving force in bringing 2-1-1 to Monterey County. We shaped the dramatic expansion of the Volunteer Income Tax Assistance service and, in partnership with the Monterey County Office of Education, initiated **Stuff the Bus** to provide children who are homeless the tools needed to succeed in school. We have set the stage for making the IMC Vision a reality in our community: Together, a Healthy, Safe Thriving Monterey County.

2014 Community Service Awards Breakfast



We begin this next phase of our work under new leadership. In June we celebrated the retirement of longtime President and CEO Mary Adams. I was honored to be part of the succession plan and am pleased to report we have had a smooth transition.

Our relationships in the community create our ability to deliver results. I invite you to become engaged with our work. I'm confident the more you learn, the more you will want to be involved.



Katy Castagna

— Katy Castagna, President and CEO



STUFF THE BUS

backpack drive provided 1,825 children who are homeless with the supplies they need to do well in the classroom and sent them to school with increased confidence



THE VOLUNTEER CENTER

brought the community together to honor almost 100 volunteers at the 39th Annual Community Service Awards.



VOLUNTEER INCOME TAX ASSISTANCE

VITA completed 2,562 tax returns and helped local residents claim more than \$3.4M in refunds and credits. This resulted in increased financial stability for families and a local economic stimulus of \$4.7M.



IMPACT MONTEREY COUNTY

gathered a rich body of data that is available for public use. More than 7,400 people responded to the survey, including 2,893 11th graders. Another 600 participated in small group community conversations. This data is searchable by anyone wanting to better understand shared aspirations



2-1-1 MONTEREY COUNTY

continued to support the economic vitality of Monterey County by providing information on programs that help residents stretch their dollars and increase their financial stability. Call Specialists provided one-on-one consultations to ensure people had information on all the services from which they can benefit

2014-15 EXECUTIVE COMMITTEE

TIM NYLEN
Chair
Vice President, CHOMP

KENT HANSEN
Past Chair
K M Hansen HR Consulting

CAROL KOLB
Vice Chair, Finance
CPA, PMB Helin Donovan

TOBI MARCUS
Vice Chair
Resource Development
Consultant Marcus Partners, LLC

DENNIS MCCARTHY
Vice Chair
Community Investments
Attorney, Fenton & Keller Law Firm

BOARD OF DIRECTORS

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County Administrative Officer
County of Monterey

SANDI EASON
Regional Senior Vice President
Business Banking Group, Wells Fargo Bank

BRETT HARRELL
Legal Counsel/Director of Risk Management
The Nunes Company

SHARI HASTEY
Executive Director
Community Partnership for Youth

BARB MCGAUGHEY
President/CEO
YMCA of the Central Coast

LUANN MEADOR
Meador Estate Vineyard/Consulting

DAVE MORA
Community Volunteer

IAN OGLESBY
Mayor Pro Tem, City of Seaside

JONATHAN PRICE
Retired Judge
Monterey County Superior Court

STAFF

MARY ADAMS
President and CEO,
Retired June 2016

Statement of Financial Position

For the Year Ended June 30, 2015

ASSETS

ASSETS

Current Assets	\$2,176,424
Other Assets	\$281,426
Property & Equipment-net	\$1,870
Endowment Assets	\$166,558
Total	\$2,626,278

LIABILITIES & NET ASSETS

Current Liabilities	\$455,053
Unrestricted & Undesignated Net Assets	\$1,876,901
Temporarily & Permanently Restricted Net Assets	\$294,324
Total	\$2,626,278

Statement of Activities

For the Year Ended June 30, 2015

PUBLIC SUPPORT AND REVENUE

Campaign Support

Pledges	\$2,326,272
Donor designations to other organizations	(\$636,320)
Provision for uncollectible pledges	(\$104,248)
Net Campaign Support	\$1,585,704

Grants, Contracts and Fees

\$685,553

Other Support*

\$1,245,888

Investment Income

\$2,065

TOTAL PUBLIC SUPPORT AND REVENUE

\$3,519,210

EXPENSES

Program Services

Allocations and Designations	\$1,055,696
Amounts designated by donors	(\$636,320)
Allocations and Grants	\$419,376
Community Services	\$2,106,405
Total Program Services	\$2,525,781

Support Services

Management and General	\$314,958
Fundraising	\$547,387
Total Support Services	\$862,345

TOTAL EXPENSES

\$3,388,126

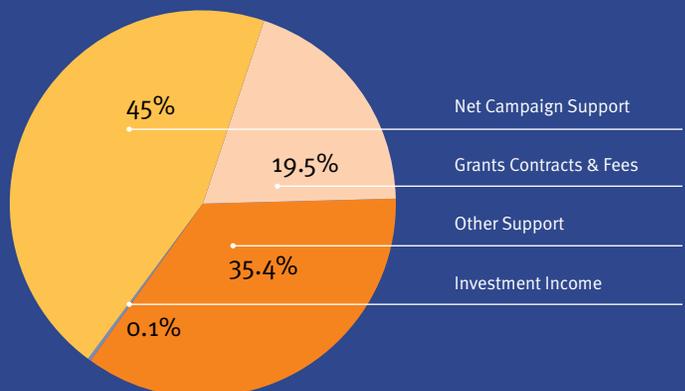
Changes in Net Assets \$131,084

* Includes donated advertising in the amount of \$1,015,785

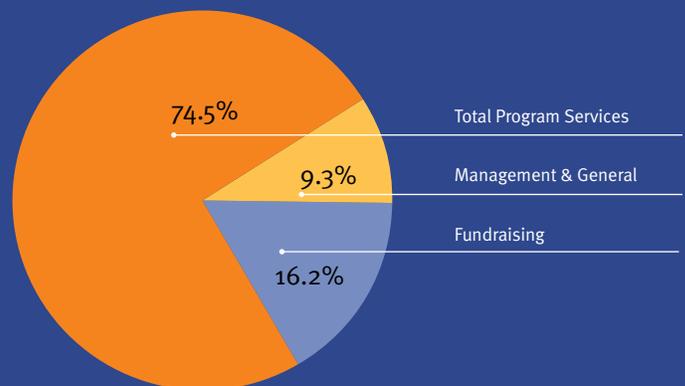
United Way Monterey County generates resources far beyond the dollars on our balance sheet. For example, last year we leveraged volunteer time valued at \$628,694 and benefited from more than \$1 million in donated media – one of the highest for any United Way. Since 2009, we've helped residents claim more than \$12,633,077 in tax credits and refunds, stimulating the local economy by \$17,686,307.

We stretch our resources and invest them strategically to help create a healthy, safe and thriving Monterey County with opportunity for all.

PUBLIC SUPPORT & REVENUE



TOTAL EXPENSES



MONTEREY
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SALINAS
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831.757.3206