STAY THE COURSE FOR MONTEREY COUNTY

UNITED WAY MONTEREY COUNTY 2020 ANNUAL REPORT
This year we expanded our collaboration through the Active Referral Network (ARN), a community of diverse local organizations helping residents overcome financial instability. ARN members work collectively to coordinate efforts by using 211 and referring clients to local resources. During this process, ARN members address critical issues such as unemployment, food insecurity, mental health, substance abuse, and homelessness.

“We partnered very early on with United Way and 211 to use their network of information as a resource for our patients. I look at this as being able to ask for help, so I have to call on United Way and 211 to get people to the services they need. There are resources United Way and 211 know that I would never know about. We need to bring everybody to the table to make sure that our community is healthy. That is why working together, we will make a much bigger change than any of us can ever do alone.”

—Dr. Reb Close, emergency physician at CHOMP

Dr. Close, an active member of United Way’s ARN, is a founding member of the Prescribe Safe Initiative, an effort to reduce opioid abuse and misuse. She led the partnership between this initiative and United Way’s 211.

The arrival of Covid-19 to our community in February brought a global pandemic into our own backyards, exposing challenges and inequities that we have been fighting to address for many years. When our Board had its first virtual meeting in March, they affirmed our direction: "STAY THE COURSE." We stay the course for the 44,000 households in Monterey County that don’t earn enough to meet their basic needs. Having steady access to nutritious food, securing reliable transportation, living in a safe and affordable neighborhood, or providing quality care for their children is out of reach for them. We are committed to changing this. Our focus on family stability will continue to be a key strategy to ensure our community will endure, and more importantly thrive.

“United Ways in California, including United Way Monterey County, have been collaborating with City and State officials to advocate for equity for all working Californians, regardless of their immigration status. The full inclusion of ITIN filers into CalEITC will help families who were left out of receiving eligible tax credits. This is a big win for our most vulnerable workers.”

—Katy Castagna, President & CEO, United Way Monterey County

In California we have many immigrant workers who do not have a social security number. With the use of an Individual Taxpayer Identification Number (ITIN), they pay their fair share of taxes, but have been excluded from receiving California Earned Income Tax Credit (CalEITC), an effective poverty reduction measure. In 2020, United Way advocated before the CA State Assembly to expand CalEITC for ITIN filers to provide equitable benefits for all hard-working Californians. The advocacy effort resulted in victory: January 1, 2021, ITIN filers will be eligible for CalEITC.

211’s Role in Collaborative Initiatives

Throughout the year, United Way’s 211 resource and referral hotline answered 12,261 calls for help, which surged when Shelter-in-Place was announced. We expanded the capacity of our call center and kept up with the rapidly changing public health and economic assistance information as it unfolded during the beginning of the pandemic.

We stayed the course to continue existing initiatives such as promoting participation in the 2020 Census, promoting free tax prep services, and supporting foster and adoptive families through our new Kinship Navigator program. We enrolled callers in new programs such as Great Plates Delivered, a collaboration with the County of Monterey to benefit qualifying seniors and other adults at high risk of contracting COVID-19 by delivering three nutritious meals a day.

In 2020-2021, 391 Salinas Valley college-bound students and their families received financial aid information and application support as a result of United Way’s Volunteer Education and College Assistance Alliance (VECAA) program.

By working together, we will make a much bigger change than any of us can ever do alone.”

—Dr. Reb Close, emergency physician at CHOMP

Advocacy for Equity:

To address the chronic shortage of licensed child care in Monterey County, we are working to expand system capacity. In addition, we are working with informal home-based providers such as Family, Friends, and Neighbors (FFNs).

Our FFN cohort supports 100 FFNs provide vital services to our community by offering low-cost, high quality care to children of working families. We have continued our work with a cohort in Gonzales and since the pandemic started, we have supported FFNs with cash assistance, personal protective equipment, health and safety trainings, and iPads to support children’s education.

This year we laid the groundwork for a Preschool Service Corps. This program will not only support our children in being prepared for kindergarten, but it will help our community by offering low-cost, high quality care to children of working families. We have continued our work with a cohort in Gonzales and since the pandemic started, we have supported FFNs with cash assistance, personal protective equipment, health and safety trainings, and iPads to support children’s education.

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25 local organizations received Emergency Food and Shelter grants to support the county’s most critical needs. The program is administered by United Way and a local board representing national agencies, homeless advocates, and local nonprofit organizations. This year, Monterey County received nearly $1.6 Million to distribute.

9,900 students are living in homeless conditions in Monterey County. In 2019, 4,303 local students received new backpacks stuffed with school supplies from our Stuff the Bus program, administered in partnership with the Monterey County Office of Education. Serving our community for 10 years, Stuff the Bus prepares students to succeed in school and eases the financial burden on families.

We continue to advocate for affordable housing and support strategies that mitigate homelessness. We work to diversify and increase the housing supply by promoting infill housing and construction of Accessory Dwelling Units (ADUs). We educate homeowners with digital tools, resources, and workshops on how to navigate the ADU construction process, creating stability for workers as well as homeowners who could use ADUs as an income stream.

940 volunteers served 16,851 hours and played a critical role in supporting our community. Volunteers prepared taxes, helped college-bound students receive financial aid, and assembled backpacks to help local students succeed in school. Moreover, they served at the Pebble Beach Concours d’Elegance helping United Way shine during the annual event. And lastly, we are grateful for the dedication, hard work and vision of our courageous Board of Directors who have always been there to guide and support us.

“We love renting our little cottage. It is great for seniors like us to get help covering our mortgage and getting close to wonderful neighbors. We gave a priority to the selection process to pet owners because we think that is important. Residents with pets have a difficult time finding housing in this region. Our neighbor, tenant is wonderful and so is his dog and rescue cat.”

—Mario Poroy, Local Artist, Ibrahim Poroy, Retired Professor of Economics

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STAY THE COURSE TO SUPPORT COMMUNITY SERVICE

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“For the past ten years we have volunteered for Stuff the Bus to make a difference in the life of a child living in homeless conditions, one backpack at a time.”

—Joe and Joanne Nemeth, Stuff the Bus Volunteers

STAY THE COURSE TO FIND AFFORDABLE HOUSING SOLUTIONS

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GRANTEES

Alliance Career Training Solutions • CASA • Castro Plaza Family Resource Center • Catholic Charities Central Coast Center for Independent Living • Community Action Partnership San Luis Obispo County Community Foundation For Monterey County (Covid Relief Fund) • Dorothy’s Place • Goodwill Central Coast • Eden Housing Gathering for Women • Hartnell College – High School Equivalency Program • Kinship Center • Laura’s Barn • MCOE – Head Start

United Way Monterey County
UnitedWayMCCA.org
60 Garden Ct, #350 307 Main St, #100
Monterey, CA 93940  Salinas, CA 93901
831-372-8026  831-757-3206
### STATEMENT OF FINANCIAL POSITION
For the Year Ended June 30, 2020

#### Assets
- **Current Assets**: $5,270,347
- **Property and Equipment, net**: $32,004
- **Other Assets**: $728,881
- **Endowment Assets**: $199,733

**Total**: $6,230,965

#### Liabilities & Net Assets
- **Current Liabilities**: $885,783
- **Long Term Liabilities**: $100,000
- **Unrestricted and Undesignated**: $2,879,783
- **Board Designated**: $1,887,514
- **Temporarily Restricted**: $278,152
- **Permanently Restricted**: $199,733

**Total**: $6,230,965

### STATEMENT OF ACTIVITIES
For the Year Ended June 30, 2020

#### Public Support and Revenue
- **Campaign Support**
  - Pledges: $1,331,203
  - Donor Designations to other Organizations: ($107,286)
  - Provisions for Uncollectible Pledges: ($91,395)
  **Total Campaign Support**: $1,132,522
- **Grants, Contracts, and Fees**: $876,029
- **Bequests**: $1,369,176
- **Other Support**
  * Includes donated advertising in the amount of $784,669
  - $923,245
  **Total**: $4,394,874

#### Expenses
- **Program Services**
  - Community Investments and Designations: $372,262
  - Amounts Designated by Donors: ($107,286)
  - Community Services: $2,131,537
  **Total Program Services**: $2,396,513
- **Support Services**
  - Management and General: $440,471
  - Fundraising: $366,815
  **Total Support Services**: $807,286
- **Dues to United Way Worldwide**: $26,515

**Total Expenses**: $3,230,314

**Changes in Net Assets**: $1,164,560

* Includes donated advertising in the amount of $784,669
**DOLLY KOONTZ**

**This year’s financial statements reflect the transformational gift of Emily “Dolly” Koontz. It is fitting that she served on the UWMC Board at the turn of the Century guiding our newly merged United Way, and that twenty years later she left a generous legacy, the largest of any planned gifts left to any United Way in the country. Dolly was a strong-minded woman set on achieving financial independence, which she did as a local realtor and owner of her own brokerage. She was preceded in death by her husband Thomas. They had no children and Ms. Koontz bequeathed half her estate to UWMC. We are in the process of planning for a significant capital project to make an even deeper impact in Monterey County as an inspiring use for this extraordinary gift.**

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**2019–2020 UNITED WAY MONTEREY COUNTY BOARD OF DIRECTORS**

**Executive Committee**

Doug Yount  
*Chair*  
The Dunes on Monterey Bay

Brett Harrell  
*Past Chair*  
The Nunes Company

Deacon Warren Hoy  
*Vice Chair, Community Investments*  
Catholic Diocese of Monterey

Willard Lewallen, PhD  
Community Volunteer

Dave Mora  
*Treasurer*  
Community Volunteer

Deborah Sober  
*Secretary*  
Community Hospital of the Monterey Peninsula

**Board Members**

Michelle Czarnecki  
California State University-Monterey Bay

Sandi Eason  
Wells Fargo Bank

Leinette Limtiaco  
Central Coast Federal Credit Union

René Mendez  
City of Gonzales

Jasmine Nguyen  
Poké Bar Marina

Elsa Quezada  
Community Volunteer

Juan P. Rodriguez  
County of Monterey

Monica Tovar  
Stephens Media Group