



Building for the Future

2022 Annual Report

United Way
Monterey County



UNITED WAY MONTEREY COUNTY

BUILDING FOR THE FUTURE



"This was a significant year for us. Not only did our in-person programs and services begin to emerge from pandemic restrictions, but we had a once-in-a-lifetime opportunity to create a center for innovation and collaboration with the acquisition of the United Way Monterey County Community Impact Center. It has been a turning point in so many positive ways for our community. With our continued investments in affordable housing, asset building and early education, we are truly Building for the Future."



Katy Castagna
President and CEO
United Way Monterey County

Stuff the Bus



In 2021, there were **10,500 children in the county experiencing homelessness**. When children have the physical resources preparing them for school, they feel more confident as they embark on or continue their educational journeys.

United Way hosted our 12th annual **Stuff the Bus** program and provided **4,500 backpacks** with new school supplies for students experiencing homelessness in 12 districts, three charter schools, two programs, and one community college.

“We have 95% of students who are socially and economically disadvantaged and **Stuff the Bus** is a crucial component in making our students feel like they have what they need to succeed.”

Tony Amezcua, Director of Family and Community Engagement, Greenfield Union School District

HOUSING: THE NEED

For decades the Monterey Bay Region has been producing new housing at a rate far below the gradual increase in demand. Insufficient supply results in extremely high rents and homes that are simply unaffordable for the majority of residents. In Monterey County, an individual would need to work 2.4 times the state minimum wage to afford the average monthly rent, which has increased by 8.6% over the last two years. Housing costs drive up the prices of everything else in Monterey County as service providers of child care, retail, and food build these housing costs into their prices. Expensive housing can also result in long commutes, traffic, or over-crowding in homes.



The Emergency Food and Shelter Program received \$1.1 in EFSP funds which were able to assist **18,493 individuals** in need. United Way granted local community benefit organization who provide emergency food and shelter assistance.



United Way was selected by the Department of Social Services to operate the **Emergency Rent and Utility Assistance Program (or ERAP)** to address the need for help for those affected by COVID-19. This year, **\$33,776,035** of assistance was distributed to **6,755** households.

EARLY CHILDHOOD INVESTMENTS: THE NEED

MONTEREY COUNTY PRESCHOOL SERVICE CORPS

The goal of this early learning initiative is to help children reach age level proficiency and support kindergarten readiness. AmeriCorps members are recruited and trained by United Way to serve in preschool classrooms and provide students reading under age level with individualized tutoring during their regular school day. In the 2021 academic year, the program served **122 children at 15 partnering sites**.



FAMILIES, FRIENDS, AND NEIGHBORS (FFN)



There is a large gap between the number of children ages 0-5 and the number of licensed childcare providers in Monterey County. Consequently, a significant portion of children are receiving care from non-licensed caregivers, usually embodied by their **Families, Friends, and Neighbors (FFN)**. This program focuses on providing these caregivers with the resources and training necessary to provide children with an engaging and safe environment that stimulates development and encourages readiness for school.

This year, FFN providers **served 120 children and attended 71 playgroups, workshops, and reflective groups**. **40 of these providers** were served by the Capacity Building project, with **77% of the providers** improving their knowledge, skills, and abilities to support early childhood development.



"I learned more about child development, the stages of growth, and how important the first five years of a child's life are."

Joba Mendez, FFN Provider

ASSET BUILDING: THE NEED

Monterey County families are faced with financial threats to their quality of life on a daily basis. Shrinking wages, increased costs, and depletion of savings are the main causes of financial instability for many working families. Our Asset Building strategies exist to help families grow toward a more secure economic future.



UWMC offered **54 Financial Literacy Education Workshops** in Spanish and English. This year, **647** participants demonstrated improved financial literacy knowledge, skills, and abilities.



The Volunteer Income Tax Assistance (VITA) program filed **1,161 tax returns** and individuals who used VITA's free services received **\$2,272,497 in refunds**.



The **Active Referral Network (ARN)** is a collaboration of community benefit organizations who coordinate services to help people access services, reach financial stability, and improve well-being. This year, with a total of **311 active partners**, **6,203 individuals** received referrals with **2,278 resulting in services**.



26,563
CALLS or TEXTS



33,016
WEBSITE VISITS



32,038
REFERRALS MADE



533
VOLUNTEERS ENGAGED



6,089
VOLUNTEER HOURS

2.1.1

2022 FINANCIALS

STATEMENT OF ACTIVITIES

PUBLIC SUPPORT AND REVENUE

Pledges, net	\$2,453,609
Grants, contractual agreements, and bequests	\$41,170,064
Other support and revenue	\$842,135
	<u>\$44,465,808</u>

EXPENSES

Community investments and designations, net	\$39,411,314
Community Services	\$2,706,673
Management, general, & fundraising	\$835,395
	<u>\$42,953,382</u>

Change in net assets before investment return	<u>\$1,512,426</u>
Investment income (loss)	<u>(\$133,482)</u>
Change in net after before investment return	<u>\$1,378,944</u>

STATEMENT OF FINANCIAL POSITION

ASSETS

Cash and cash equivalents	\$5,185,776
Pledges receivable, less allowance	\$604,323
Grants and accounts receivable	\$3,362,541
Other current assets	\$32,738
	<u>\$9,185,378</u>
Property and equipment, net	<u>\$6,304,522</u>
Beneficial interest in assets held by others	\$985,655
Other nonconcurrent assets	-
	<u>\$985,655</u>
	<u>\$16,475,555</u>

LIABILITIES & NET ASSETS

Accounts payable	\$195,454
Grants payable	\$3,962,669
Accrued expenses & other liabilities	\$124,087
Refundable advance	\$1,587,896
Long-term debt	\$3,491,328
	<u>\$9,361,434</u>
TOTAL NET ASSETS	<u>\$7,114,121</u>
	<u>\$16,475,555</u>

Footnotes:

* Includes donated advertising in the amount of \$542,025

BOARD

OFFICERS

Sandi Eason
Chair

Jacob Martinez
Vice Chair, Community Investments

Monica Tovar
Vice Chair, Resource Development

Steve Emerson
Treasurer

Deborah Sober
Secretary

BOARD MEMBERS

Sam Chaidez

Warren Hoy

Ann Kern

Willard Lewallen

Stefan Lorch

René Mendez

Juan P. Rodriguez

Shannan Watkins



\$38,348,337 IN GRANTS

Grants provided to following partners:

Boys and Girls Club of Monterey County
California Rural Legal Assistance
Community Action Partnership of SLO
Central Coast Energy Services
City of Gonzales
City of Greenfield
City of King
City of Monterey
City of Salinas
City of Seaside
City of Soledad
Communities Organized for Relational
Power in Action
Door to Hope
First 5 Monterey County
Food Bank for Monterey County
Gathering for Women
Goodwill Central Coast
Hartnell College Foundation
Housing Resource Center
Monterey Peninsula College Foundation
Mujeres en Acción
North Monterey County Recreation &
Park District
Salvation Army Monterey Peninsula
Watsonville Law Center