



2021 UPDATE

# SANTA BARBARA UNITED

Building Better Futures Together

# COVID-19 RESPONSE

\$41.6 million raised or managed by United Way to support Santa Barbara County

**\$5.6M** RAISED

through the Joint Response Effort for Santa Barbara County to respond to community needs



**\$32.2M** MANAGED

in CARES Act, CDBG, & Treasury funds to provide rental/utility assistance and other services



**\$2.2M** SECURED

from the \$5.6M raised to provide Individual Assistance Grants for local households



**5,100+** HOUSEHOLDS

have received individual, rental, & utilities assistance from United Way of Santa Barbara County



**237** NONPROFITS

have received a total of \$3.2M in support grants from the Joint Response Effort



**\$1.3M** RAISED

for Learning & Enrichment Centers that provide 600+ students with in-person education support



**\$685K** RAISED

to provide emergency child care services for up to 278 children of local essential workers



**\$715K** RAISED

for a Critical Needs Fund to support contact tracing, isolation capacity, & the Vaccination Equity Project



**38,000** STUDENTS

have used United Way literacy tools to improve reading skills in a virtual learning environment



**350** STUDENTS

had access to United Way's adapted virtual Fun in the Sun learning program last summer



Above are highlights from United Way's COVID-19 response as of November 2021. Visit [unitedwaysb.org/covid19](https://unitedwaysb.org/covid19) for more. Special thanks to our lead community partners:





United Way of Santa Barbara County and its key community partners continue to respond to the COVID-19 pandemic in Santa Barbara County. Current efforts are focused on providing rental relief and homelessness prevention services based on needs assessments conducted with dozens of community partners.

The pandemic has highlighted the precarious financial and housing situation that many of our friends and neighbors find themselves in as they struggle to make ends meet. Children and families are also struggling with lingering learning loss and social/emotional skill loss after last year's school closures.

This work is only possible thanks to the generous support of hundreds of service delivery partners, cross-sector funding partners, and caring community members like you. Your support allows United Way to develop new and innovative collaborative efforts to meet the needs of our most vulnerable residents. We deeply appreciate your continued partnership in these crisis response and recovery efforts.



For more information about our COVID-19 response efforts, please visit [www.unitedwaysb.org/covid19](http://www.unitedwaysb.org/covid19)

**"I would like to THANK YOU beyond words for your support through this tough financial stretch. Good news is I have been able to keep my rental payments current!! I don't know how I would have been able to get through this without your gracious support. My oldest just started Kindergarten, I still am working and have my daughter at home (as she is only 4). Please know how much this has helped me keep my little household going and at as much ease as possible.  
Endless gratitude."**

**"Thank you so much for this much needed support during the pandemic and business closures. I really appreciate the rental assistance, your support and notifying me about the rental assistance. This is such a relief to know that I will be able to stay in my apartment, a safe place to be, while we await the recovery of our economy and the end of this pandemic. I'm so grateful to you and all the other staff and supporters of this rental assistance."**

# FUN IN THE SUN 2021 WRAPS UP

Smarter summers build brighter futures for 350 students & 250 parents

Children, parents, and staff were thrilled to be back in the classroom for United Way's Fun in the Sun (FITS) summer learning program, which successfully returned to an in-person program during summer 2021. The nationally-recognized six-week summer learning program had operated in a virtual format in 2020.

Fun in the Sun transforms academically at-risk children (grades 3-12) from low-resource neighborhoods into successful, confident students through an integrated and structured set of academic and enrichment activities. FITS served a total of 350 children and 250 parents from low-resource neighborhoods at six locations, including a brand new North County site in Guadalupe.

Thanks to the generosity of over 50 funding partners and service delivery partners, students received much-needed academic support and enrichment, and meaningful connection with peers and educators after so many months of school closures and social distancing.

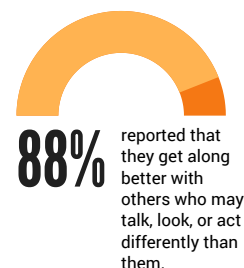
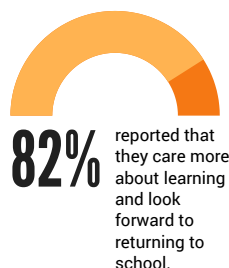
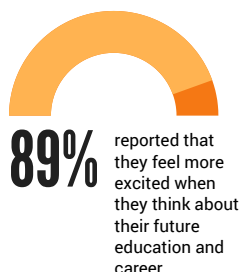
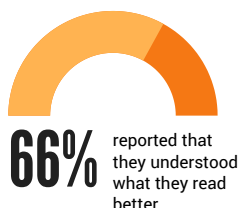
Due to the pandemic's toll on students' mental and physical wellness, additional program components were added to the FITS 2021 program, including:

- **A robust mindfulness program called Inner Explorer** that has been used in the Goleta Union School District (GUSD). Additional activities included yoga, and a partnership with Inner Warrior that develops mindfulness, self-defense and self-advocacy skills.
- **Additional social/emotional support for students and families.** Family Service Agency visited the sites weekly to support FITS staff with behavior management and difficult situations. Hospice of Santa Barbara trained FITS staff to create safe, supportive spaces that are conducive to healing and the program's mindfulness activities. Hospice also met weekly with FITS's Counselors in Training to provide our teens with ongoing social emotional support and guidance.
- **Expanded bicycling program in partnership with Santa Barbara Bike Coalition.** Students at all sites stayed active with weekly bike lessons. In alignment with the STEAM curriculum, students also practiced basic bike maintenance and problem-solving skills.
- **Outdoor walking field trips** locally where appropriate. With Nature Track, students went on hikes with nature educators to learn about local ecosystems in their neighborhood.
- FITS worked with Explore Ecology and One Cool Earth to implement **a gardening program at every site.** FITS participants learned about gardening and food sustainability and revitalized neglected school gardens.



# PROGRAM RESULTS

Post-program survey results from participants in the 2021 Fun in the Sun program



The support of donors and partners like you changed the life of Chris (name changed for privacy). He began the program filled with grief and acting out in anger after having tragically just lost his mom. To no one's surprise, he often disrupted the class.

Although challenging for staff to find the right ways to support him, they continued to work closely with Chris and his family and connected them to local resources. Over the program's six weeks, we and the staff saw a remarkable change. Chris made new friends, learned to ride a bike for the first time, and found new confidence in himself. He also improved his reading comprehension and speed and developed problem-solving skills through hands-on science and math activities.

On behalf of the many Fun in the Sun participants whose lives were changed with your support, thank you!

To learn more about our Fun in the Sun program, please visit [www.unitedwaysb.org/fits](http://www.unitedwaysb.org/fits)



# UNITED LEARNING CENTER EXPANSION

## United Way and Housing Authority Partner to Expand United Learning Center

United Way’s United Learning Center is expanding for the 2021-22 school year after successfully improving literacy and social-emotional skills in 72 schoolchildren during the previous school year.

In partnership with the Housing Authority of the City of Santa Barbara (HACSB), UWSBC has launched an expanded version of the United Learning Center – GRAD Academy. This partnership will transition students who previously attended the Housing Authority’s GRAD Academy afterschool program to United Way’s long-standing United Learning Center. Later this fall, the program will also expand to another satellite location at Franklin Elementary School to serve their high-need students.

United Way’s United Learning Center is a tutoring center with the main classroom at the United Way facility and local satellite classrooms at local schools and community centers. Through small group tutoring in reading and writing, students and instructors work together on personalized lesson plans developed by a credentialed teacher. The focus is on “whole child success” achieved through data-driven instruction and a robust enrichment curriculum developed to engage learners at all levels.



**United Learning Center participants gain an average of 2 reading levels in their literacy skills working in 12 week cohorts.**





**"Brian\* was dealing with family issues and was having a lot of problems with his behavior and focus in school. His mother enrolled him in the United Learning Center, which quickly became of his favorite parts of his day. With the caring support of ULC staff, Brian reached grade-level reading skills and was better able to concentrate in class. Brian loved coming to ULC so much, his mom asked if we would keep him enrolled to provide ongoing support and consistency."**

\*(name changed for privacy)

United Learning Center services are needed now more than ever before with pandemic-related learning loss. The stakes are especially high for students in their elementary school years. If students are unable to close the learning gap and are still underperforming by third grade, they face substantial future difficulty graduating high school. Without additional learning support, local children will struggle with the effects of the pandemic's school closures for years to come.

During the 2020-21 school year, ULC served Harding Elementary School's highest-need first-graders and participants in United Way's Fun in the Sun summer learning program. Participants gained an average of 2.3 reading grade levels.

Thanks to the support of caring community members like you, so many more Santa Barbara County students and their families will make life-long positive improvements that will significantly expand their life opportunities.

To learn more about the United Learning Center, please visit [www.unitedwaysb.org/ulc](http://www.unitedwaysb.org/ulc)



# 2021 RED FEATHER RECEPTION

The event raised over \$220,000 to support educational programming



Act I hosts Xorin Balbes & Truman Davies with Belle Hahn and James Semick



Steve Ortiz, President & CEO gives a short update about educational programming at United Way



Guests mingling during Act II at the home of Michael & Nati Smith

After hosting a virtual campaign in place of the Red Feather Ball in 2020, guests gathered in person for the first time in two years for the 24th annual Red Feather event, held on October 8th, 2021. Due to lingering restrictions and safety concerns associated with the COVID-19 pandemic, the event was reformatted from a traditional indoor ball to an outdoor reception held in two parts.

The first portion of the evening, Act I, was held at the private estate of Xorin Balbes and Truman Davies. Guests celebrated at the newly renovated property alongside the event's six co-chairs: Shari Liu Fellows, Amber Ortiz, Nati Smith, Belle Hahn, Lily Hahn, and Fran Kirchmair and honorary committee members. Over the course of the evening, attendees heard from Shari Liu Fellows, event co-chair and member of the United Way Board of Directors, followed by commentary from Steve Ortiz, President, and CEO of the organization. The brief presentation focused on the importance of United Way's educational programming, which has become even more essential with the effects of the COVID-19 pandemic on the health and well-being of students of Santa Barbara County.

After the formal reception at Act I came to a close, guests were escorted two doors down to the home of Michael & Nati Smith for music, cocktails, and dancing.

Traditionally, the Red Feather event is a primary source of funds for United Way's educational programs, including the award-winning Fun in the Sun summer program and the local United Learning Centers. In 2019, the Red Feather Ball broke records as the highest-grossing fundraiser in the organization's history. For the 2021 campaign, United Way was able to meet all expected fundraising goals. United Way credits its supportive network with this success and looks forward to a return to its traditional ball next year.



# PARTNER SPOTLIGHT

## Family Service Agency



Since March 2020, Family Service Agency (FSA) of Santa Barbara County and United Way of Santa Barbara County (UWSBC) have worked together to provide rental and other emergency assistance grants to Santa Barbara County's most vulnerable residents. Having had a successful partnership during the 2017 Thomas Fire and 2018 debris flows, UWSBC asked FSA to reactivate the crisis response partnership to review assistance applications and provide case management services to local families and individuals.

In total, since April 2020, UWSBC has distributed over \$20.5 million in financial and rental assistance to more than 5,100 county households impacted by the COVID-19 pandemic.

FSA staff play a critical role in ensuring that funds are distributed to the most vulnerable local residents. They listen compassionately to the stories of desperate residents and offer additional resources for parenting help, food, supplies, and childcare as well as referrals to counselors, legal assistance, and housing advocates.

"FSA has been a key partner in helping process thousands of applications and provide significant relief to families and individuals," said Steve Ortiz, UWSBC President & CEO. "The large number of grants is a testament to the overwhelming need in our community."

Thank you to Family Service Agency for their vital partnership in meeting community needs. For more information about our COVID-19 crisis response efforts, please visit [www.unitedwaysb.org/covid19](http://www.unitedwaysb.org/covid19).

For more information about Family Service Agency, visit [www.fsacares.org](http://www.fsacares.org)

# PLANNED GIVING CORNER

[www.unitedwaysbgift.org](http://www.unitedwaysbgift.org)

## What Can Planned Gifts Do?

Remembering an organization in your estate plans is often referred to as “planned giving”. A planned gift allows you to create a lasting legacy while planning for your future and that of your loved ones. Planned gifts can create hope for a better world, a hope that can extend for generations to come.

Do you envision making gifts to loved ones as well as to organizations closest to your heart as part of your estate plans? You can achieve both goals by creating a planned giving design that both supports your loved ones and leaves a lasting legacy in the community through strategic charitable gifts.

By reviewing various options with your financial advisor, you can choose a gift that best meets your immediate and future financial needs and those of your loved ones.

A planned gift to United Way of Santa Barbara County allows you to create a powerful philanthropic legacy for generations to come in one or more of these areas:

- **Improving school readiness and academic achievement**
- **Financial empowerment**
- **Crisis response and recovery**

Please consider including United Way in your estate plans and create hope for brighter futures.



## Planned Gifts Do Two More Things - Lower Taxes & Provide Income

Planned gifts not only leave a legacy, they can lower taxes for you and/or your heirs and/or they can provide income for you and/or your heirs.

Some planned giving options include:

- **Retirement Accounts including IRAs**
- **Life Insurance**
- **Wills & Trusts (bequest)**
- **Stock – using appreciated stock to fund a planned gift**
- **Life Estate (valuable property you use during lifetime with arrangements to give to charity upon death)**
- **Charitable Gift Annuity (CGA) (income producing)**
- **Charitable Remainder Trust (CRT) (income producing)**
- **Charitable Lead Trust (CLT)**
- **Donor Advised Fund (DAF)**

We encourage you to work with your financial advisor to determine which assets to give, the best time to give them, and the type of gift arrangement to make, or to contact United Way of Santa Barbara County to help arrange a consultation with an attorney or financial advisor to help answer your questions about how to best make a planned gift to United Way of Santa Barbara County.

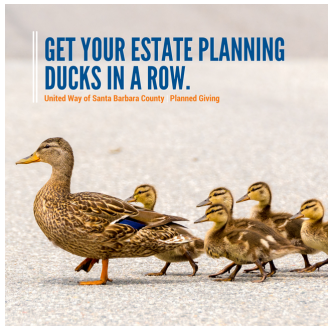
## Remembering United Way in Your Estate Plans?

If you have included or are considering including a gift to United Way of Santa Barbara County as part of your estate plan, please reach out to us!

We would like to thank you for your generosity, make sure the purpose of your gift is documented, and offer you membership in the Heritage Club.

**THANK YOU  
FOR CREATING  
OPPORTUNITIES AND  
INSPIRING HOPE  
FOR A BETTER  
TOMORROW**





## Free Estate Planning Workbook

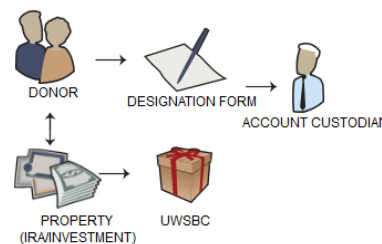
Starting to think about a will and/or trust? Need a little refresher? Interested in learning about including charitable giving in your estate plans? United Way's FREE Estate Planning Workbook can help! The first half is about estate planning basics. The second half is about charitable giving as part of an estate. Go to [www.unitedwaysbgift.org/estateguide](http://www.unitedwaysbgift.org/estateguide) to request a copy by mail or as a download.

## IRA Beneficiary Designation Gifts Simple, Tax-Smart & Affordable

If you are interested in making a planned gift to United Way but are also concerned about your current and future needs, know that IRA beneficiary designation gifts are simple, tax-smart, and flexible. Talk to your financial advisor about funding legacy gifts with your traditional IRA, which is a taxable asset except when gifted to charity, while leaving other non-taxable assets to heirs.

### How an IRA beneficiary designation gift works:

- Contact the person who helps you with your account.
- Ask them to send you a beneficiary designation form or show you where to find this online.
- Complete the form, sign it, make a copy for yourself, and mail in the original.
- When you pass away, your IRA will be distributed consistent with the beneficiary designation. Your IRA company will not be influenced by what your will or trust says, what your spouse or kids say, or what your trustee says. The most recent IRA beneficiary designation form signed and submitted determines who will inherit your IRA, so it is very important to make sure this designation is up-to-date.



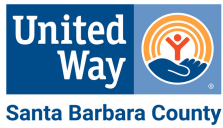
Even after you complete the beneficiary designation form, you can take distributions from your IRA. You can also change your mind at any time in the future for any reason, including if you have a loved one who needs your financial help.

Most beneficiary designation forms are very flexible. You can name United Way of Santa Barbara County (UWSBC) as a “full” or “partial” beneficiary of your IRA. You can also name UWSBC as a “primary” or “contingent” beneficiary. Please make sure your IRA designations are current and consider a legacy gift to United Way through your IRA.

**Please contact us if we can be of assistance to you.**

Shanna Wasson Taylor  
 Gift Planning Services Officer  
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 805-882-0502 | [www.unitedwaysbgift.org](http://www.unitedwaysbgift.org)

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### Special Recognition

Maryan & Caryn Schall