

SANTA BARBARA UNITED

BUILDING BETTER FUTURES TOGETHER

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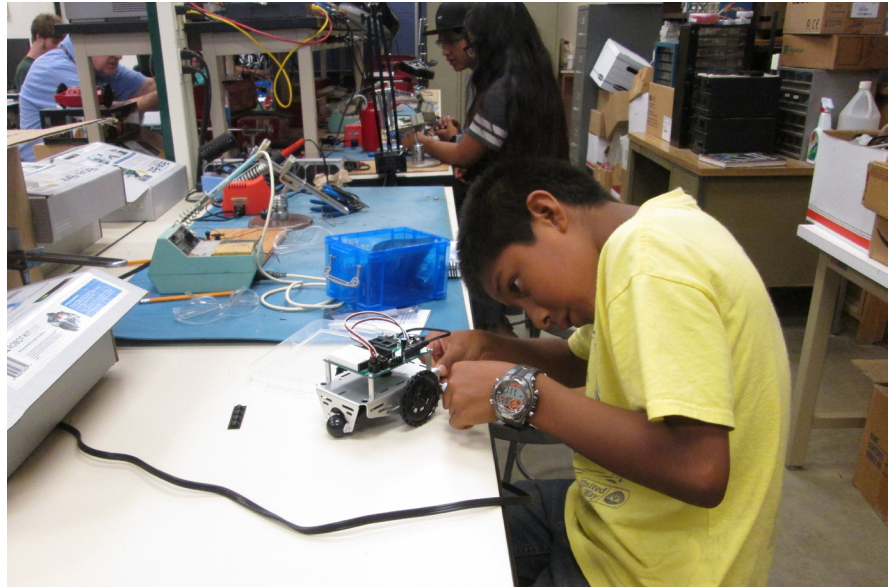
BUILDING BETTER FUTURES

LEGOS HAVE BECOME ONE OF THE MOST PROLIFIC TOYS OF ALL TIME. Simple, polychromatic, plastic blocks have been tweaked, remixed, and configured in a multiplicity of formats. You can find Legos that create a farm, Legos for 3 year olds, or Legos that replicate the Millennium Falcon (Star Wars).

Legos have such a robust usage because, at their core, Legos represent an essential human value: the *desire to build*.

Humans build basilicas over centuries, we build neighborhoods, we build ornate furniture, and we build cultures. The instinct to create is deep inside all of us. Humans are especially inspired to build when we are aware of a need.

United Way of Santa Barbara County is entering its own season of building. Throughout our 92 years serving in Santa Barbara County, we have created and managed strategic partnerships with hundreds of local agencies and organizations. Today, we are compelled to address the educational, financial empowerment and health challenges in Santa Barbara County.



Fun in the Sun Scholar during Lego Robotics Class

Challenge	Goals 20/20	Strategies
<p>Education: 61% of our county third graders are reading under grade level and only 85% amount of students graduate high school reading at grade level.</p>	<ul style="list-style-type: none"> - Increase on-time graduation rates by 50% - Increase the percentage of students reading at or above grade level in every grade by 50% 	<p>United for Literacy provides reading and math improvement tools available to local schools, families, non-profits, and businesses.</p> <p>Fun in the Sun gives students from low resource communities the opportunity to stay engaged and learning during summer, as well as participate in enrichment activities that they otherwise would not experience.</p>
<p>Financial Empowerment: 1 in 3 households (33%) do not have sufficient income to meet their basic cost of living</p>	<ul style="list-style-type: none"> - Increase by 50% the number of lower-income families who are financially stable 	<p>Through VITA and other United for Financial Empowerment programs we give local families the tools they need to boost income, and build savings and assets.</p>
<p>Health: The number of Americans without health insurance totals about 47 million. More than 80% are working families.</p>	<ul style="list-style-type: none"> - Increase by 30% the percentage of youth and adults who receive preventive care - Increase percentage of seniors who stay independent 	<p>Health Services Discount Card provides savings for medical, dental, prescriptions, hearing aids, glasses & contact lenses and more.</p> <p>Strategic Grants support organizations such as the Friendship Center, who are caring for our senior citizens</p>

We realize that these goals are difficult; that is why we are not pursuing them alone. A community is enriched when individuals, organizations, and governments all work together. United Way of Santa Barbara County currently partners with 206 different organizations to meet these goals. We need more resources that can provide the expertise, time, and finances required to build a hopeful future.

Many members of our community have already been incredible partners. We thank them and the many others who will join with us in the upcoming year, but collaboration is not a one-time goal, it is value of civility that requires continued commitment to work together. By asking for partnership, we are asking our community to come together for something bigger than ourselves.

With your help, we are **Building Better Futures Together!**

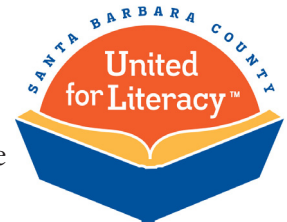


Kindergarten Success Institute Students at Harding Elementary

UNITED FOR LITERACY

Improving Education in Santa Barbara County

UNITED FOR LITERACY (UFL) IS UWSBC'S LARGEST INITIATIVE and consists of numerous programs that aim to improve education within the Santa Barbara community. One of the various programs that fall under UFL is Kindergarten Success Institutes (KSI). The program operates 3-4 weeks before the start of kindergarten, where students learn school-related behaviors that are essential to their success throughout their schooling.



Krista Munizich, a KSI teacher at Canalino Elementary for the past 15 years, believes that KSI gives students an opportunity to really build the foundational skills they need while learning how to write their name, how to use pencils, and other basic early educational skills that provide a solid foundation for a child's educational career.



Krista and Eddie Munizich at the 2015 Ball

Krista and United Way's other educational partners were recognized at United Way's 19th annual Red Feather Ball on December 5, 2015 at the Coral Casino. Krista Munizich and her husband were part of the 250 guests in attendance that night, which honored Janet Garufis and the Santa Barbara Foundation. Krista was also featured in the Fun in the Sun/United for Literacy video that premiered at the ball, emphasizing the importance of improving education locally and early. Proceeds from the Red Feather Ball directly benefit the national award winning Fun in the Sun and United for Literacy. This year, the ball raised nearly \$250,000.

"You want that first introduction to school to be a positive one because once they realize that they can do it, it makes a difference... all the way through their schooling."

-KRISTA MUNIZICH

PARTNER SPOTLIGHT

The Errett Fisher Foundation and Santa Ynez Fun in the Sun



2015 Fun in the Sun Staff and Scholars

UNITED WAY OF SANTA BARBARA COUNTY IS ECSTATIC TO ANNOUNCE A \$120,000 GRANT FROM THE ERRETT FISHER FOUNDATION TO SUPPORT THE NEWLY-ESTABLISHED SANTA YNEZ VALLEY SITE OF FUN IN THE SUN FOR THE NEXT THREE YEARS!

The grant ensures that United Way has seed funding that will guarantee this additional site through 2018 and beyond to serve dozens of Santa Ynez Valley's disadvantaged children and families each summer.

During its 11-year partnership with United Way, the Errett Fisher Foundation has invested more than \$600,000 in United Way's educational partnership programs, notably Fun in the Sun (FITS) and United for Literacy (UFL). In fact, the Errett Fisher Foundation has been the single largest donor to United Way's Fun in the Sun Endowment, which ensures a steady revenue stream for the program in perpetuity.

Thanks to the support of the Errett Fisher Foundation and Fun in the Sun's many other funding partners, United Way was able to expand the FITS program to the Santa Ynez Valley for the first time in FITS history. In 2015, 48 low-income Santa Ynez children and their parents and families benefitted from Fun in the Sun's academic and enrichment curriculum designed to reduce/reverse summer learning loss and narrow the achievement gap between low-income students and their higher-income peers.

Despite the fact that the site was brand-new, feedback from parents, staff, and partners emphasized that the site felt like it had been running for years. Due to the strong support and investment from staff, partners, students, parents, and funders (especially the Errett Fisher Foundation!), we are proud to announce that the site will continue for Santa Ynez's most at-risk children and families for the next three years.

Overall, across all sites, participants met or exceeded all six of FITS's major academic and social/emotional target goals at their highest levels to date. Within the reading component alone, 93% of participants maintained or gained literacy skills, instead of losing two to three months of prior learning achievements – the average summer learning loss experienced by low-income children.

These remarkable results and the unique experiences provided to participating children and families would not be possible without the financial support of FITS's 22 funding partners. Please join us in thanking the Errett Fisher Foundation for helping the FITS collaborative dramatically improve the lives of more than 1,000 previous FITS participants, as well as the lives of thousands more future FITS participants.

YOUNG LEADERS SOCIETY

6 Years of Volunteerism, Professional Development & Networking

YOUNG LEADERS SOCIETY (YLS) WAS INAUGURATED 6 YEARS AGO AS AN EFFORT TO GALVANIZE THE YOUNG PROFESSIONALS IN SANTA BARBARA COUNTY TOWARD LEADERSHIP AND ENGAGEMENT IN THE LOCAL COMMUNITY. Societies and cities are strongest when leadership is being continuously renewed. When a city lacks a strong emergent group of leaders, it eventually suffers from a “leadership vacuum” that slows and stifles the momentum put towards solving community issues and civic growth.

In his book *Bowling Alone*, Harvard University Professor Robert Putnam explores the diminishing and rebirth of community life and civic engagement. He highlights the idea of social capital - the relationships we have with one another – as the cornerstone of strong community.



YLS members Kelly Schon and Rachel Brown

“What really matters from the point of view of social capital and civic engagement is not merely nominal membership, but active and involved membership.”

-PROFESSOR ROBERT PUTNAM

YLS exists to ensure that the importance of social capital is not lost on this next generation of leaders. When we look back at our history, the relationships formed in the bowling allies, church meeting rooms, morning breakfast shops, and community meetings have sustained our society. Many of those historic places do not have the same influence on current young leaders, which means it is more important than ever that YLS creates opportunities for our emerging leaders in Santa Barbara to strengthen their social capital in order to ultimately serve the common good.

YLS galvanizes young leaders in three ways: volunteerism/philanthropy, professional development, and networking. Currently YLS has more than 100 active members ages 21 to 40 years old.

- **VOLUNTEERISM/PHILANTHROPY:** Collectively serving local needs within the community by giving our time and financial resources (e.g. Day of Caring, Fun in the Sun, Read Across America, Meals at Casa Esperanza, United We Bowl)
- **PROFESSIONAL DEVELOPMENT:** Opportunities to learn about local resources, refine professional skills, and learn best practices for the work place and at home (e.g. StrengthsFinder training, Marketing-Branding, Budgeting Investment, and Conflict Management)
- **NETWORKING:** Times to meet other professionals and spend time with others who want to contribute to the civic growth of our community (e.g. YLS Anniversary, United We Bowl)



YLS members and guests at Lunch Bunch at Franklin School Fun in the Sun

If you are interested in knowing more, follow us on Twitter and Facebook, email Cori Gacad (cgacad@unitedwaysb.org) or visit www.unitedwelead.org.

 @UnitedWaySB

 /YoungLeadersSocietySBC

REMEMBERING PAUL MERSHON, LONGTIME UWSBC VOLUNTEER

February 7, 1925 - March 21, 2015

PAUL MARZE MERSHON JR. WAS BORN IN WALTERS, OKLAHOMA. HE WAS A VETERAN OF WWII AND SERVED IN EUROPE. After graduating from the University of Oklahoma with a degree in geology, Paul worked in the oil and gas industry in Texas, New Mexico and Colorado, and in 1973 formed Macy and Mershon Oil and Gas Co.

Paul moved to San Diego in the late 1970's where he met his wife Terrie. After moving to Santa Barbara in the 1980's, Paul learned to fly a jet to ease his commute to his business in Denver.

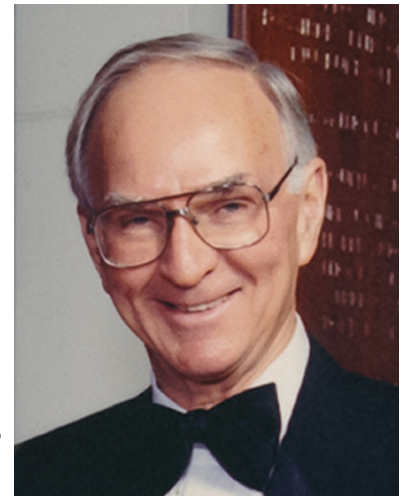
As a Santa Barbara resident, Paul became actively involved in many organizations including United Way of Santa Barbara County. He served as a member of United Way's Board of Directors from 1991 to 1998. He began serving on United Way's Allocations Committee in 1992 and soon became chair of that committee to oversee the work of more than 100 volunteers until 1996.

Paul was very generous with his time, talents and treasures, and was recognized year after year as the member of the Alexis de Tocqueville Society for his annual giving to United Way. He became a member of United Way's Heritage Club in 1991 when he made his first planned gift to benefit United Way.

Paul had many passions including his love of fishing and travel. Though Paul never had children of his own, he loved being a grandpa to his wife's grandchildren, and when they were old enough Paul included his grandchildren in his travels.

Paul remained very active, taking archeology courses when he was in his 80's, playing bridge, and walking in the foothills in his neighborhood until he was 89 years old. He enjoyed his life to the fullest and was grateful and gracious to the end, leaving behind a legacy and an example that is inspirational.

We remember Paul's kind and unifying touch during various, sometimes challenging, events and committee meetings. His presence always produced better outcomes. His goal was to make this a better world, and when he passed away in March, we were notified that Paul had named United Way of Santa Barbara County as a beneficiary of his IRA. Through this IRA gift, he passed the full value of his IRA, endowing his annual giving to United Way. Paul's legacy will touch the lives of so many people in our community for generations to come.



Paul Marze Mershon Jr.

What LEGACY will you leave?

We all desire significance - to lead happy and fulfilled lives surrounded by family and friends.

For many of us, there is a compelling need to make a difference - to leave a lasting impact on the people most dear to us and the world in which we live. The search for significance and desire to plan for the future leads many to ponder their legacy. What kind of legacy will you leave? A bequest is perhaps the easiest and most tangible way to have a lasting impact on the people and organizations that mean the most to you. A bequest may also be an effective way to make a gift to charity and lessen the burden of taxes on your family and estate.

A bequest is one of the easiest gifts to make. With the help of an advisor, you can include language in your will or trust specifying a gift to be made to family, friends or charity as part of your estate plan.

A bequest may be made in several ways:

- Gift of a percentage of your estate
- Gift of a specific asset
- Gift of the residue of your estate

2015- 2016 Board of Directors

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Diane B. Doiron, CLU - Vice Chair

Doiron Financial Associates

John Hanna - Vice Chair

Retired Executive

G. Paul Didier, CFP, MBA - Board Secretary

United Way of Santa Barbara County

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Blas Garza- Past Board Chair

Retired Professor

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James Armstrong - *Retired City of SB*

Jim Brown - *Santa Ynez Valley College
School District*

Lance Connor - *Reliable Engineering Services*

David Flattery- *DuPont Displays*

Leo Hamill - *City National Bank*

John Karbula - *Solvang School District*

Alex Koper - *Citibank*

George Leis - *Union Bank*

Pamela Lombardo - *UCSB*

Cliff Lundberg - *Westmont College*

Terri Maus-Nisich - *County of Santa Barbara*

Chuck Mertz - *Lockheed Martin*

Bob Montgomery - *Montgomery Vineyards*

Kevin Nelson - *Cottage Health*

Mike Nissenson - *Real Estate Executive*

David Prichard - *Bank of America*

Certain types of property pass outside of a will or trust. These assets such as retirement accounts and life insurance policies require that you name a beneficiary by completing a beneficiary designation form. To make a bequest of these assets, you should contact the company or entity from which you purchased the asset.

Bequest of an IRA

A retirement asset like an IRA account makes an excellent bequest to charity. If the IRA were given to your family, your beneficiaries would be receiving taxable income and much of the value would be depleted through estate and income taxes. By designating United Way of Santa Barbara County as the beneficiary of part or all of your IRA, the full value of the gift is transferred tax free at your death and your estate receives a charitable deduction. If you wish to leave your IRA to your spouse at your death, you may also designate charity as the secondary beneficiary of your account. Contact your IRA or retirement account custodian to obtain a beneficiary designation form and make a bequest from your IRA.

If you make a provision in your estate plan to leave your legacy to United Way, please notify us so we can thank you and recognize you as a member of the Heritage Club.

For more information about the many benefits of making a planned gift with United Way, contact Judy Goodbody, CFRE, CRTP, Gift Planning Services Officer at 965-8591 ext.120 or email jgoodbody@unitedwaysb.org or visit our website at www.unitedwaysb.org/giftplanning

THE SEASON OF GIVING BACK

David and Judy Flattery

Lynda's four grandchildren (for whom she is their legal guardian) recently made a large move from Santa Maria to Santa Ynez to be closer to work and cut down on travel expenses, but this large one cost did not allow her to reserve money for purchasing Christmas presents. Lynda's grandchildren were Fun in the Sun students in Santa Ynez and had a transformative experience with the program, staff, and volunteers!

Serendipitously, Judy and Dave Flattery (United Way Board Member) were determining how they wanted to go about their yearly Holiday tradition of giving to those in need and contacted United Way. The Flatterys graciously took up the role of Santa Claus for Lynda's grandchildren and provided gifts for each of them. Perhaps the biggest gift was for Lynda who said, "We would not have had Christmas if not for the Flatterys. It was a blessing."



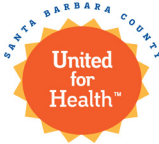
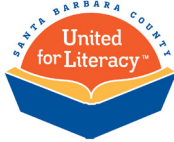


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United Way
 of Santa Barbara County, Inc.
www.unitedwaysb.org



YOU'RE INVITED

2016 EVENTS

For detailed information on UWSBC events, please visit
www.unitedwaysb.org

- 2016 VOLUNTEER TAX ASSISTANCE KICK OFF:** Ribbon cutting ceremony to recognize all the volunteers
Wednesday, February 3rd from 2-3pm at UWSBC Office
- UNITED WAY OPEN HOUSE:** Learn about some of UWSBC's multifaceted programs for longterm education, financial empowerment and health goals. *Thursday, February 18th from 5-7pm at UWSBC Office*
- YOUNG LEADERS SOCIETY UNITED WE READ:** Visit local classrooms and read to elementary students
Friday, February 26th from 8-10am at Franklin School and El Camino School
- 93rd ANNUAL AWARDS CELEBRATION:** Help us honor the outstanding work of the Santa Barbara community, its donors and volunteers. *Wednesday, May 18th from 6-9pm at Four Seasons Biltmore*
- FUN IN THE SUN:** The national award winning 6-week summer learning and enrichment program
Monday-Friday, June 20th-July 29th from 8-3pm at 5 locations within Santa Barbara County
- 25th ANNUAL DAY OF CARING:** Participate in a one-day volunteer event helping complete much needed tasks
Saturday, September 17th from 8-1pm at various sites throughout Santa Barbara
- 20th ANNUAL RED FEATHER BALL:** Join us at our annual gala in honor of Paul Didier's upcoming retirement & in support of Fun in the Sun and United for Literacy programs.
Saturday, October 15th at 6pm at the Coral Casino, Four Seasons Biltmore