



VOLUME 2

# SANTA BARBARA UNITED

Building Better Futures Together

IN THIS ISSUE | Fun in the Sun, Thomas Fire and Flood Fund Distribution, Gift Planning, In Memoriam & More



## FUN IN THE SUN

Jackey wants to thank you for another summer of Fun in the Sun

Fun in the Sun's 300 participants and 200 parents had another successful summer, with 100% of participants improving their academic skills during the six-week summer learning program.

We wanted to share a letter from one of our remarkable Fun in the Sun participants, Jackey, about Fun in the Sun's impact on her family.

"My mother worried about my younger brother, Emiliano. He had a hard time learning and never received the extra attention he needed to improve. That changed the summer between third and fourth grades, when he attended Fun in the Sun. He became an entirely different person as he told us about all the new friends he was making and everything that he learned each day.

During his third summer in Fun in the Sun, Emiliano took his responsibilities as an older student and role model very seriously. He taught the younger ones the ropes, and made sure they knew that they could come to him with questions.

Through Fun in the Sun, Emiliano learned how to interact with other children and was able to catch up academically. It completely changed my brother's life, and my mother and I are forever grateful. Now Emiliano has plans for his future, with aspirations of becoming an engineer. We know that Fun in the Sun got him where he is today."

The lives that are changed in families like Jackey's and many others only happen because of your support. You are driving important change that lasts for generations in our community and our participants. We are honored and lucky to have special friends like you.



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## SB GIVES CAMPAIGN

Would you like to help more FITS scholars have a smarter summer in 2019?

United Way's Fun in the Sun has been selected as a featured project for this year's SB Gives Campaign. Donations to FITS made at [www.sbgives.org](http://www.sbgives.org) will be matched through December 31, 2018!



## UNITED WAY THOMAS FIRE & FLOOD FUND

United Way distributes \$1,958,000 in Santa Barbara County

United Way of Santa Barbara County (UWSBC) has distributed to the community 100 percent of the United Way Thomas Fire and Flood Fund donations allocated to Santa Barbara County.

“Our community truly rallied following the devastation to support those who lost family members, homes and their livelihoods,” said Steve Ortiz, UWSBC President & CEO. “We are humbled to have the trust of our community. It has been a challenging year for everyone; our hope is that these funds will make a difference and help families and our community continue the rebuilding process”.

The United Way Thomas Fire & Flood Fund was jointly established by the United Ways of Santa Barbara and Ventura Counties to help the region recover. From the Fund’s inception, United Way has promised that 100 percent of these donations will go directly to affected individuals and families, as well as the organizations serving them.

### Distribution at a glance:

- United Way Thomas Fire and Flood Fund allocation for Santa Barbara County: \$1,958,000.
- United Way Thomas Fire and Flood Fund distributed to community organizations in Santa Barbara County: \$711,000 (supporting over 10,000 Santa Barbara County residents).
- United Way Thomas Fire and Flood Fund awards were distributed to 421 Santa Barbara County individuals/households (representing more than 1,200 individuals): \$812,659.
- Restricted donor funds allocated to support ongoing preparedness, recovery, and rebuilding efforts in Montecito: \$99,341.

(Story continues on next page)

Photos show volunteers assisting Habitat for Humanity with disaster recovery and home repair projects. This unique opportunity was coordinated in partnership between United Way and Habitat for Humanity.





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Disbursements made to Santa Barbara County individuals and families ranged in size from \$500 to \$10,000 and were based on recommendations made through Family Service Agency's case management process to determine and verify needs. Santa Barbara County residents who were eligible for assistance included next of kin for individuals who lost their lives as a result of the debris flow; those who suffered damage or total loss of their primary residence (including renters) and/or personal property (including vehicles); and people who were unable to work during or after the Thomas Fire or debris flow.

Funding criteria were reviewed and finalized by UWSBC's Long Term Recovery Committee, a multi-sector group of community leaders actively involved in the community's disaster recovery efforts.



A search dog hard at work. The National Search Dog Foundation was awarded funding for their disaster response efforts.



Day of Caring volunteers removing mud from a Montecito residence after the January 9 debris flow.

Funds have made a big difference to recipient individuals and organizations. Marco Farrell and his parents, Jeff and Gabrielle Farrell, are just one of the families being served by Habitat for Humanity, which was awarded \$115,000 in disaster relief funds. Realizing that the Farrell's insurance would not cover all the damages brought on by the storm, and upon learning that Jeff Farrell served in the U.S. Navy during the Vietnam War, the organization was motivated to start rebuilding the family's home, brick by brick.

"They were incredible, from day one," Marco said, adding that his family was surprised that Habitat for Humanity had chosen to help them. "They ended up saving a lot of our valuables. It's given us hope and internal strength to know that all these people were coming to help and volunteer their own time."

To find more information, please visit [www.unitedwaysb.org/thomas-recovery](http://www.unitedwaysb.org/thomas-recovery).

## THE NEW TAX LAW & CHARITABLE GIVING

Learn how you can receive new tax benefits through charitable giving

Whether you itemize or take the standard deduction, there are strategies you can use to receive new tax savings, other non-tax benefits, and continue to support United Way of Santa Barbara County.



**Make an outright gift of an appreciated asset to United Way** - Donating appreciated assets allows you to support United Way of Santa Barbara County while generating a charitable tax deduction and potentially capital gains tax savings. This strategy provides tax benefits to itemizers and non-itemizers. Learn more at [unitedwaysbgift.org/Stocks](http://unitedwaysbgift.org/Stocks) and [unitedwaysbgift.org/RealEstate](http://unitedwaysbgift.org/RealEstate)

**Give from your pre-tax assets by making an IRA Rollover gift** - If you are 70½ or older, this strategy allows you to give up to \$100,000 directly from your IRA rather than take the required distribution from your IRA. This strategy does not result in a charitable deduction but will help you avoid tax on the distribution. This strategy is useful whether you itemize your deductions or not, and it is especially beneficial to those taxpayers who are not able to itemize their deductions because of recent changes to the tax law. Learn more at [unitedwaysbgift.org/IRARollover](http://unitedwaysbgift.org/IRARollover).

**Fund a Charitable Gift Annuity (CGA) or Charitable Remainder Unitrust (CRUT)** - CGAs and CRUTs provide annual income, a charitable income tax deduction and potentially favorable capital gains treatment while allowing you to support United Way of Santa Barbara County. Your specific benefits will be affected based on whether you itemize or take the standard deduction. Learn more at [unitedwaysbgift.org/CGA](http://unitedwaysbgift.org/CGA) and [unitedwaysbgift.org/CRUT](http://unitedwaysbgift.org/CRUT).

## HERITAGE CLUB NEWS

Earl Damitz, Paul Didier, and Sally Walker honored

United Way of Santa Barbara County established the Heritage Club to honor forward-thinking individuals choosing to include United Way in their estate plans. Heritage Club members recently gathered to celebrate and to be celebrated for leaving their legacies to this community.

The group enjoyed lunch sponsored by [Kayne Anderson Rudnick](#), learned about the history of the Heritage Club, was updated on the good work of United Way, and honored Heritage Club members Earl Damitz, Paul Didier, and Sally Walker. Learn more at [www.unitedwaysbgift.org](http://www.unitedwaysbgift.org).

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Visit our New Planned Giving Website [unitedwaysbgift.org](http://unitedwaysbgift.org) for personal planning tools, including our free 2018 Wills & Trusts Guide.

## IN MEMORIAM

Recognizing the legacies of two community champions: John Wigle and JoAnn Caines



### John Wigle

We are saddened to share the news that former United Way Board Chair, John Wigle, passed away in June.

John spent many years driving positive change on the United Way Board and Campaign Cabinet, and in many other community projects. He was deeply committed to supporting our community and as the Chairman and CEO of AGIA Affinity, John led by example in promoting volunteerism and philanthropy in the workplace. United Way had the honor of recognizing his and AGIA's generosity and philanthropy at the Red Feather Ball in 2010.

John was a charismatic, innovative individual with a fun personality. He always knew how to use his humor, positive attitude, and high standards to bring out the best in everyone he met. He will be deeply missed by United Way staff and volunteers, as well as the community at large.

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### JoAnn Caines

Longtime educational champion and dear partner, Jo Ann Caines, Principal of La Cumbre Junior High School, passed away in June.

For nearly 25 years, during her time at both La Cumbre Junior High and Adams Elementary Schools, Jo Ann was a partner with United Way to provide her beloved students and families with Character Counts, Fun in the Sun, United for Literacy, Kindergarten Success Institutes, and Parent Success Institutes.

Jo Ann was deeply committed to providing as many high-quality educational and family support services as possible to her students and families in an effort to improve their day to day lives and put them on the paths to brighter futures.



She often thought outside the box to form unconventional partnerships with a wide variety of community organizations in an effort to add valuable services to the lives of hundreds of La Cumbre Junior High children and families, and many others living on Santa Barbara's Westside. Her goal was for La Cumbre to serve as a community center for the Westside and she extended the campus's open hours and offered wraparound services for families, like free dinner, parent education classes, exercise classes, and tutoring.

Jo Ann's commitment to youth and families was truly remarkable and rare. United Way's staff, volunteers, and students and families will deeply miss Jo Ann.



## UNITED WAY OF SANTA BARBARA COUNTY BOARD APPOINTMENT

Rosemary Mutton Joins United Way Board of Directors

Rosemary Mutton has been appointed to the United Way of Santa Barbara County Board of Directors. Though Rosemary and her husband, Nick, have recently moved to Santa Barbara, they have long been involved with United Way previously in other communities. In Santa Barbara, the Muttons have graciously hosted two United Way events in their home. Rosemary is also a Founding Member of Women United. Please join us in welcoming Rosemary to UWSBC's Board of Directors!



New Board member, Rosemary Mutton (right), pictured with Fun in the Sun scholar, Gabriel and his mother, Irma.

## RED FEATHER BALL 2018

Honoring Volentine Family Foundation

Thank you to the generous sponsors, donors, and guests who made Red Feather Ball a success! Their support raised much needed funds for core United Way programs: Fun in the Sun and United for Literacy.

United Way also honored the Volentine Family Foundation as the 2018 Abercrombie Community Excellence Award winner for outstanding service and generosity within the Santa Barbara community.

“Over the last 15 years, the Volentine Family Foundation has helped transform the lives of thousands of students and families through their support of Fun in the Sun and United for Literacy,” said Steve Ortiz, President & CEO of United Way of Santa Barbara County. “We are honored to recognize the Volentine Family for its commitment to building better futures for children and families who need it most.”

To read more about the event and obtain photos, please visit [www.unitedwaysb.org/2018-red-feather-ball](http://www.unitedwaysb.org/2018-red-feather-ball)



Claudette Sabiron (third from left) and her family representing Volentine Family Foundation at the Red Feather Ball



Rick Scott, UWSBC Board Chair and Steve Ortiz, UWSBC President & CEO



United Way  
of Santa Barbara County, Inc.

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UNITED WAY  
**WOMEN UNITED**  
**OPEN HOUSE**



**TUESDAY, DECEMBER 4, 2018**

**5:30 PM - 7:30 PM**

**UNITED WAY OFFICE - 320 E GUTIERREZ ST, SANTA BARBARA**



- Mix and mingle with other Women United members
- Experience hands on demonstrations of our web-based Power Reading software
- Learn about the difference you make by supporting Kindergarten Success Institutes and United for Literacy



Hors d'oeuvres and beverages will be served



Santa Barbara County

Please RSVP with Tina Nelson by November 26  
nelson@unitedwaysb.org (805) 965-8591