

SANTA BARBARA UNITED

BUILDING BETTER FUTURES TOGETHER



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United Way 

United Way
of Santa Barbara County

Participating Schools:
Arpinteria Children's Project at Main School
College/Santa Ynez Elementary School
El Camino Elementary School
Franklin Elementary School
Harding Elementary School
Hope Elementary School
Isla Vista Youth School
McKinley elementary school

In Partnership with:
Wood Claeysens Foundation

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20th ANNUAL RED FEATHER BALL

Community Members Step Up to Support Local Education



Janet Garufis, Maryan Schall, and Nancy and Kurt Ransohoff at the 20th Annual Red Feather Ball

RED FEATHER BALL GUESTS HAVE PLEDGED THEIR SUPPORT IN A BIG WAY TO IMPROVE EDUCATION IN SANTA BARBARA COUNTY.

Nearly 300 local leaders gathered to support United Way of Santa Barbara County's Fun in the Sun and United for Literacy programs and honor retiring UWSBC CEO, Paul Didier, at the 20th annual Red Feather Ball on October 15, 2016 at the Coral Casino. United Way was thrilled to have not one, but two \$30,000 challenge gifts to jumpstart the live auction portion of the evening! United Way's participating families, volunteers, and staff send their deepest appreciation to Lillian Lovelace and Maryan Schall, who pledged their support for Fun in the Sun and United for Literacy.

Each year, the Red Feather Ball benefits United Way's national award-winning Fun in the Sun and United for Literacy programs. Combined, they provide life-changing educational improvement services to 7,000 disadvantaged Santa Barbara County children and families.

Generous attendees and sponsors typically raise almost \$250,000 each year, which allows even more children to attend Fun in the Sun and more families to benefit from United for Literacy. In 2016, 98% of FITS 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. Outstanding results like these would not be possible without support from so many organizations and individuals like those attending Red Feather Ball.

The 21st Annual Red Feather Ball will be held on Friday, October 6, 2017 at the Coral Casino. We are excited to be honoring Maryan Schall this year for her continued support of UWSBC and other local programs and initiatives.



Goleta Literacy Support Continues to Grow

Goleta Literacy Partnership Donations Help Build Better Futures

ONE OF UNITED FOR LITERACY'S NEWEST EXPANSIONS, THE GOLETA LITERACY PARTNERSHIP, HAS GARNERED STRONG SUPPORT FROM LOCAL COMMUNITY MEMBERS, INCLUDING THOSE WHO ATTENDED RED FEATHER BALL, AS WELL AS OTHER BUSINESSES AND INDIVIDUALS.

Thanks to the support of 20 organizations and individuals, we have raised over \$150,000 in financial support to launch the Goleta Literacy Partnership. The Goleta Literacy Partnership is a first of its kind partnership between Goleta Union School District (GUSD) and UWSBC to provide three-year district-wide literacy improvement in GUSD. This partnership will provide unlimited Power Reading literacy improvement software at all nine GUSD elementary schools and ongoing teacher support, training, and evaluation from UWSBC.

The GUSD Literacy Partnership will provide long-term, life-changing literacy improvement to thousands of students.

- Goleta Union School District Superintendent Bill Banning

Since 2012, students at five of GUSD's nine elementary schools have used United Way Power Reading software with great success. Power Reading is an interrelated set of online, research-based literacy tools and techniques that helps improve reading skills in beginning readers and older students who need additional practice, and helps teachers more easily and effectively reach every student at their skill level. GUSD Superintendent, Bill Banning, who spoke at this year's Red Feather Ball shared, "Our teachers, students, and families love its flexibility; highly individualized instruction (critical given GUSD's academic and economic diversity); and its embedded assessments and reports that help maximize student growth."

After three years of consistent Power Reading usage at El Camino Elementary—a GUSD school with a high number of financially and academically at-risk students, the results were extremely positive: the percentage of students who were on-target to meet grade-level benchmarks increased from 15% to 24%, according to Lexia's embedded assessment. Additionally, in February 2016, El Camino became one of the few schools in Santa Barbara County ever to exit Program Improvement—a classification the Department of Education assigns to schools that do not meet yearly progress goals. Given the outstanding results at El Camino and other Power Reading schools, GUSD and UWSBC are confident that a districtwide literacy improvement project can significantly improve the futures of thousands more children and families. The effects will be far reaching, as students go on to attend junior high, high school, and college.

It takes the support of an entire community to make programs like the Goleta Literacy Partnership, United for Literacy, and Fun in the Sun a success. To learn more about how you can support these projects, please visit www.unitedwaysb.org/donate.



Goleta Union School District Literacy Partnership Donors

Lead Sponsors - \$25,000+

Goleta Union School District

United Way of Santa Barbara County

Walter & Holly Thomson Foundation

Silver Sponsor - \$15,000

Montecito Bank & Trust

Bronze Sponsor - \$10,000

Mike & Dale Nissenson

Deckers Outdoor Corporation

Pewter Sponsor - \$5,000

Lance Connor & Nancy Werner

Sponsors up to \$4,999

AGIA Affinity Services

Berkshire Hathaway

Bob & Robin

Howard-Anderson

Randy Glick

Rudi Schulte Foundation

Santa Cruz Markets

Taryn O'Connell

Paul Sherman

Kevin Nelson

Patrice Ryan

Deanna Panzarella

Afshin Fatholahi

David Washburn

Volunteer Income Tax Assistance (VITA)

Working Together to Serve Our Neighbors

WITH OVER 100 TRAINED VOLUNTEERS AND DOZENS OF COMMUNITY PARTNERSHIPS THE 2016 VOLUNTEER INCOME TAX ASSISTANCE (VITA) PROGRAM RETURNED \$3.2 MILLION TO 3,100 FAMILIES IN SANTA BARBARA COUNTY.

Volunteer Income Tax Assistance (VITA) is a free tax preparation service for low- and moderate-income individuals and families in Santa Barbara County earning less than \$64,000 annually. Tax returns are prepared and completed by IRS-certified volunteers each year from February through April throughout south Santa Barbara County. VITA is one component of UWSBC’s United for Financial Empowerment Partnership, a multi-pronged initiative that provides families and individuals with tools, services, and education to help them build long-term assets and become more financially stable.



VITA has produced successes for clients and volunteers alike. One client, Elizabeth*, was a hardworking, single mother, trying to put her child through college at UCSB. Elizabeth and her daughter lost their home and were homeless for several months. Fortunately, Elizabeth received a refund of several thousand dollars, as she qualified for most low-income tax benefits, which allowed her to finally move into an apartment with her daughter.



A VITA participant receives information about her taxes

A VITA volunteer, Manuela, shared how VITA has allowed her to give back to her new community. After moving from Austria three years ago to study at UCSB, Manuela is now a portfolio manager at Montecito Bank and Trust. She began volunteering with United Way’s VITA program in early 2015. Her work with VITA allowed Manuela to use some of her financial skills with a broader population. She shared, “I love it when families get refunds. One single mom received all her tax credits and got a \$7,000 refund, and it is good to know I can help in a practical way.” Manuela is moved by the families seeking tax preparation and financial advising. Our volunteers aren’t simply tax preparers, they are friends and neighbors.

Investing in the people of Santa Barbara helps build better futures for us all. If you are interested in volunteering, please visit www.unitedwaysb.galaxydigital.com for more information. If you earn less than \$64,000 annually and want to have your taxes filed before April 15th, please call the VITA Hotline (805-899-2313) or go online to www.unitedwaysb.org/vita. *Name has been changed

2016 Tax Improvement Results and Statistics

2,672 Families filed tax returns **\$3.2 million** in tax returns

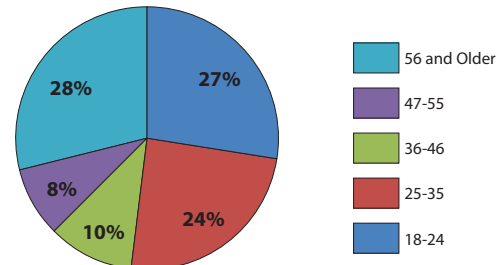


totaling

In Partnership with Primerica Financial Services:

- 5 Families** Purchased Car or Home Insurance
- 7 Families** Purchased Life Insurance
- 5 Families** Opened a College Savings Account

Age of Participants



In the last 3 years

The Partnership has served 8,437 clients who received a combined \$14.2 million in tax refunds!

YOUNG LEADERS SOCIETY

YOUNG LEADERS SOCIETY RECOGNIZES BRIANNA AGUILAR

Brianna is a Santa Barbara native, attending Roosevelt Elementary, Santa Barbara Jr. High, and Santa Barbara High School. After graduating from UC Berkeley, she began to work in the Recruitment and Retention Center at the college along with her friend, and now local California State Assemblywoman, Monique Limon. Working directly with students, providing resources, and educational access was immensely fulfilling. Her work led her to be the director of an after school program with 600 Kindergarten to 5th grade children at a family resource center in Oakland. The day-to-day was busy but Brianna was energized by the impact she was making on the families and children.

Upon returning to Santa Barbara, Brianna began a job at Montecito Bank and Trust, and enrolled in University of California Santa Barbara's Ph.D. in Education program. The job at Montecito Bank and Trust was intended to be temporary, but Brianna ended-up enjoying her work and the ways the company wanted to engage the local community, particularly the communities that have little engagement with banks and the financial system. Now, Brianna and her team rotate to the 5 Fun in the Sun sites teaching financial literacy and budgeting. Brianna's long-term commitment to the program has enabled her to see results.

"I get so excited when I see kids connect the dots," she says, happy to see the kids debating how to budget and discussing the differences between "needs and wants." While she and her team remain the instructors, learning is evident when the kids begin to teach one another. "You really know [something] when you teach it," Brianna says, as watching the students encourage and instruct one another means that information isn't simply being given to students, but absorbed.

Santa Barbara is better because of Brianna Aguilar's work, and we are proud to work with her and honor her as the 2016 Young Leaders Society's Young Leader of the Year.

Left: Brianna shares a laugh with United Way of Santa Barbara County President & CEO, Paul Didier, at a Fun in the Sun event hosted by Montecito Bank & Trust at the Music Academy of the West.



7TH ANNUAL UNITED WE BOWL

November 4, 2016 marked the 7th Annual United We Bowl, an event that raises funds for United Way of Santa Barbara County's United We Read program through a fun night of bowling and raffles. This past year, a record \$5,000 was raised at the event. A big thank you to our sponsors, The Towbes Group, Cottage Health, Union Bank, and Montecito Bank and Trust, as well as all of the attendees.

We look forward to seeing you at this year's 8th Annual United We Read on Friday, February 24, 2017. Join us as we read to students at two schools: Franklin Elementary (1111 E. Mason Street) from 8:30-10:00am and El Camino Elementary (5020 San Simeon Drive) from 10:00-11:00am.



YLS members and guests at the 7th Annual United We Bowl

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

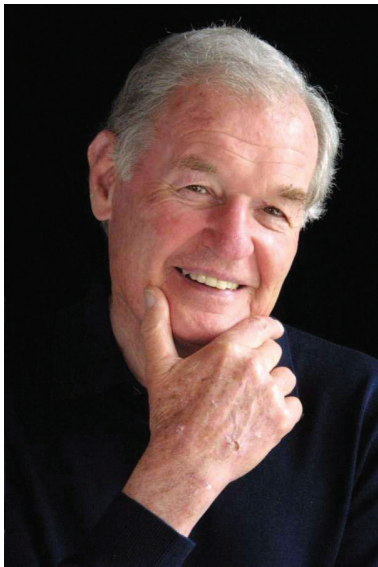
 @UnitedWaySB

 /YoungLeadersSocietySBC

REMEMBERING LARRY CRANDELL

April 5, 1923 - August 30, 2016

UNITED WAY OF SANTA BARBARA COUNTY IS HONORING THE LEGACY OF LARRY CRANDELL, A UNITED WAY VOLUNTEER AND FRIEND FOR 40 YEARS, WHO PASSED AWAY IN AUGUST 2016.



Larry Crandell

Over his 50+ years in Santa Barbara, Larry Crandell built a reputation as “Mr. Santa Barbara”, working tirelessly as a volunteer fundraiser for dozens of local nonprofits, including United Way of Santa Barbara County.

Larry’s support of United Way of Santa Barbara County dates back to 1976 when he began volunteering for United Way’s Annual Community Campaign. He first approached United Way with the idea that he might make a good volunteer MC if United Way would agree to a trial run for a few Thank You Luncheons. After that, Larry proceeded to become United Way’s go-to MC for another 25 years! In all, Larry made more than 100 public appearances on our behalf, using his humor, positive attitude, and high standards to bring out the best in both event attendees and the staff at United Way.

He would often talk about how, as a youngster, he and his family received help from his local United Way. He also extolled the virtues of “psychic income”, the payoff that comes when making contributions of time and money to others.

He grew United Way’s event attendance each year as more supporters would show up wanting to see the United Way’s “unusual” MC. In turn, Larry would always deliver on his promise to entertain the audience, even showing up in an unknown tear-away suit that he ripped off onstage to reveal himself in full Lakers basketball uniform!

Larry’s legacy and impact on United Way perhaps best lives on in his efforts to begin and support United Way’s signature annual gala event, Red Feather Ball. He sat down with fellow event founder, Katherine Abercrombie, and United Way staff to develop the concept for Red Feather Ball, which has now become hugely successful for the community and its outstanding volunteers and supporters.

Larry Crandell is dearly missed by United Way’s staff, volunteers, and beneficiaries, as well as the Santa Barbara County community. Please join us in honoring and celebrating Larry Crandell’s life and legacy.

HERITAGE CLUB

In Memoriam of Members

UNITED WAY OF SANTA BARBARA COUNTY WOULD LIKE TO THANK AND HONOR TWO OF ITS HERITAGE CLUB MEMBERS, WHO RECENTLY PASSED AWAY AND MADE GENEROUS BEQUESTS TO UNITED WAY OF SANTA BARBARA COUNTY.

Daniel Liff, who passed away in June 2015, made a nearly \$550,000 bequest to UWSBC’s endowment through a living trust. Both a devoted Grateful Dead fan and firm believer of practicing gratitude in his daily life, Daniel Liff’s generous donation will be administered as “The Grateful Daniel Fund”. This special gift will be used to improve UWSBC’s capacity and efficacy in delivering a higher quantity and quality of services in education, financial empowerment, and health in Santa Barbara County. His generosity will ensure that thousands of local residents receive much-needed programming in perpetuity.

Maurice Charles Lucky, who passed away in December 2016, made a \$360,000 bequest to UWSBC’s endowment by naming United Way as a beneficiary of his IRA. Charles’s wife, Gail (a Heritage Club member since 1990), first introduced him to United Way’s Allocation Panel in 1997 and they both continued to support UWSBC throughout his life.



Daniel Liff

continued on page 7

2016- 2017 Board of Directors

Board Officers

- John Wigle - Board Chair
AGIA Affinity Services
- 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
- Rick W. Scott - Chief Financial Officer
Cancer Foundation of Santa Barbara
- Blas Garza- Past Board Chair
Retired Professor

Board Members

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- Lance Connor - *Reliable Engineering Services*
- David Flattery - *DuPont Displays*
- Leo Hamill - *City National Bank*
- John Karbula - *Lompoc Unified School District*
- Alex Koper - *Citibank*
- George Leis - *Montecito Bank & Trust*
- Cliff Lundberg - *Westmont College*
- Terri Maus-Nisich - *County of Santa Barbara*
- Chuck Mertz - *Lockheed Martin*
- Bob Montgomery - *Montgomery Vineyards*
- Kevin Nelson - *Cottage Health*
- Mike Noling - *Community Volunteer & Business Leader*
- Mike Nissenson - *Real Estate Executive*
- David Prichard - *Bank of America & U.S. Trust*



Charles Lucky

In 2011, Charles became a member of the Heritage Club. Because of Charles's forward-thinking gift, thousands of Santa Barbara County children, families, and seniors will be able to build better futures through United Way programs and services.

United Way and the Santa Barbara County community are deeply appreciative of and thankful for such generous and caring friends like Daniel Liff and Charles Lucky.

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

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.

If you are interested in learning more about making a significant Planned Gift to United Way without spending any money today, please contact Shanna Taylor at 805-965-8591 x120 or staylor@unitedwaysb.org, or visit www.unitedwaysbgift.org.



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YOU'RE INVITED

**Community Impact
Open House
A Farewell to Paul**

**Thursday, February 23, 2017
5:00 - 7:00PM
United Way Office
320 E. Gutierrez Street**



*Meet the staff and community partners who will continue to
change lives through United Way's multifaceted programs.*

RSVP to Lindsay Rorick at lrerrick@unitedwaysb.org or 805-965-8594



320 E. Gutierrez Street, Santa Barbara, CA 93101
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