



# UNITED

2021–2022 Impact Report



Santa Barbara County

# Standing strong together

Dear Friend,

The mission of United Way of Santa Barbara County (UWSBC) has always been to work with partners and community members to provide the foundation for a more resilient community. In recent years, that directive has been put to the test unlike any other time in our organization's history. The devastating effects of the COVID-19 pandemic continue to magnify a wide range of challenges for residents here in our local communities and throughout the world. Students, families, and neighbors will continue to feel the financial and emotional effects of this pandemic for years to come.

United Way, alongside dedicated public and private community partners, has played an integral role in providing comprehensive, timely, and impactful relief through expanded, adapted programming and new initiatives to address changing needs. In partnership with local organizations, disaster response officials, local municipalities, and the County of Santa Barbara, United Way has distributed over \$34 million in relief to families and households struggling with rent, utility bills, and other basic needs since the start of the pandemic in 2020.

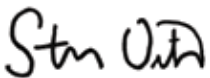
As United Way worked to strengthen families, our efforts to support students and their futures remained an important focus. In the last year, United Way's core educational partnership programs with local districts continued to expand in both capacity and curriculum, providing more students throughout the county with the tools and resources they needed to reach educational goals. Our students are better prepared to effectively engage with peers, focus during lessons, and reach educational goals



# in times of crisis.

and milestones. With help from dedicated partners like you, United Way can continue to create these essential learning spaces, providing a comprehensive spectrum of support that will influence participants and their families throughout their lives.

Utilizing established resources, networks, and tools, United Way has developed the capability to adapt quickly to changing environments to provide programs and support in the areas that our neighbors need it most. This community is at the heart of our mission. United Way's extensive network of partners, philanthropists and foundations, volunteers, and staff make the work that we do possible. Together, we can continue to strengthen the foundation that those in our most vulnerable communities need to build a brighter future.



Steve Ortiz, President & CEO



## 2021 Impact Report

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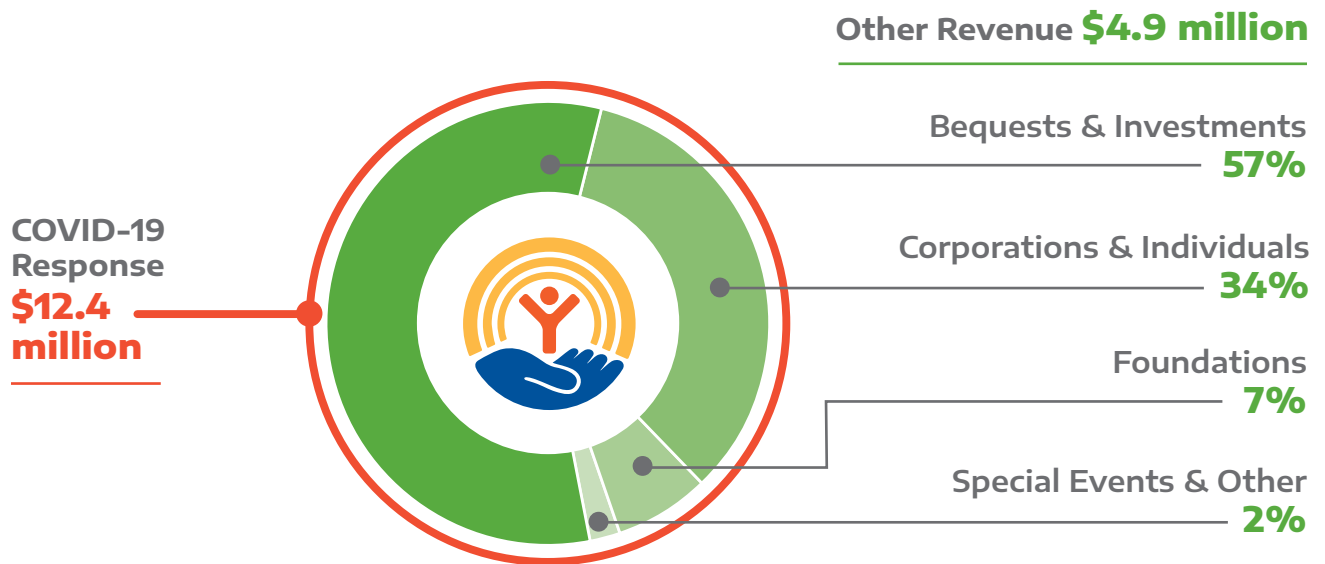
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Santa Barbara County

# Last year United Way raised and invested **\$17.3 Million** into our local community.



## Our Mission

To enrich the lives of children and families and build resilient communities by leading local programs and partnerships that improve school readiness and academic achievement, financial empowerment, and crisis response and recovery.

## Our Vision

Strong local communities where committed networks of leaders and organizations are united to provide children and families the education, financial skills, and resources necessary to be successful today and resilient in times of community crisis.

## Programmatic Focus Areas



School Readiness and Academic Achievement



Response and Recovery in Times of Community Crisis



Financial Empowerment

## United for Literacy



Supporting students in our community has always been an essential pillar in United Way's efforts to build a more resilient community. In partnership with local educators, school districts, and community organizations, United Way steps in to fill the achievement gap that many low-resource students and families experience in reaching their educational goals and milestones. United Way creates safe and supportive learning spaces for students throughout the year through impactful community programming like **Fun in the Sun**, the **United Learning Center**, **School-Based Programs**, and **Early Learning Success Institutes**. Each of these programs incorporates individualized academic support, access to community services, and a dedicated network of community partners and educators to support families and students in building a stronger foundation for a brighter future.

### School-Based Programs

In partnership with local school districts across the county, United Way supports **over 25,000** students with web-based literacy programs and software. These programs, Lexia and Reading Plus, are both accessible 24/7 online and continue to be essential tools for educators and students. The need for supportive virtual and hybrid learning software continues to grow, as districts manage the residual effects of the COVID-19 pandemic on student progress. **47 schools** throughout the county utilize these programs to support the educational progress of students of all ages.



## Fun in the Sun



In 2021, Fun in the Sun, United Way's national award-winning summer learning program, returned to an in-person program after a virtual program held in 2020 due to the COVID-19 pandemic. The summer learning collaborative served 350 children and 250 parents at six locations in Carpinteria, Santa Barbara-Eastside, Santa Barbara-Westside, Goleta, Solvang, and a brand-new Guadalupe site that launched to serve North County students. With the support of dedicated program staff, school districts, and United Way's extensive network of community partners and educators, students enjoyed a safe and enriching summer experience at all sites throughout the county. As the effects of the COVID-19 pandemic continue to ripple throughout the community, the need for the Fun in the Sun program is more intense than ever, bringing students together to overcome the challenges of extended isolation and distance learning with a focus on STEAM and literacy curriculum. To best support both the educational and emotional needs of participants, United Way expanded its focus on mindfulness and mental health in both education and enrichment activities with the addition of supplemental program components including:



- **Yoga practice** with local instructors and studios
- **Social-emotional programs and support** for students and families
- Partnership with Inner Warrior, a program that develops **mindfulness, self-defense, and self-advocacy skills**
- Expanded **bicycling program** in partnership with Santa Barbara Bike Coalition
- Engaging **STEAM enrichment activities**
- Partnerships with Explore Ecology and One Cool Earth to implement a **gardening program** at every site

In response to the intense need of participating students and their families, Fun in the Sun supplemented engaging educational and mindfulness curriculum with a comprehensive range of wraparound resources to support household health and stability. Partnering with organizations like the **Assistance League**, **Hospice of Santa Barbara**, and **Family Service Agency**, Fun in the Sun was able to provide over 600 community members with essentials like food and clothing, mental health counseling and education, and homelessness prevention services. Participating families struggling with rent and utility bills were also encouraged to apply for United Way's Emergency Rental Assistance Program and were connected to impactful community resources and organizations to support other basic needs.

**"I was so impressed with Fun in the Sun! The staff are exceptionally friendly, knowledgeable, and organized. Adrian enjoys attending every day and I was so happy he got an eye exam and free goodies for dental/travel care. We were so blessed to get the opportunity to be part of the program and that Adrian had a safe place to be in the summer."**

*— Fun in the Sun Parent*

## 2021 Results

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**100%** of scholars displayed gains in reading and literacy skills.

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**87%** of scholars maintained or displayed a gain in self-esteem and positive identity.

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**86%** of participant parents reported improvement in their child's behavior.

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**83%** of scholars maintained or displayed a gain in positive self-control.

## Fun in the Sun Donors

### \$15,000+

Assistance League of Santa Barbara  
 Audacious Foundation  
 Edison International  
 Guadalupe Union School District  
 James S. Bower Foundation  
 June G. Outhwaite Charitable Trust  
 The Towbes Foundation  
 Volentine Family Foundation  
 Walter and Holly Thomson Foundation  
 Yardi Systems, Inc.  
 Zegar Family Foundation  
 1 Anonymous Donor

### \$10,000–\$14,999

Albertsons  
 Hutton Parker Foundation  
 Nissenson Family Fund  
 Sansum Clinic  
 Wood-Claeyssens Foundation

### \$3,000–\$9,999

William and Deirdre Arntz  
 Asian American Architects and Engineers Foundation  
 Atlantic Aviation  
 The Coeta & Donald Barker Foundation  
 Julianna Dain and Tom Dain  
 Deckers Outdoor Corporation

Henry E. & Lola Monroe Foundation  
 Herbert and Gertrude Latkin Foundation  
 Lockheed Martin Santa Barbara Focalplane  
 Montecito Bank & Trust  
 Samuel B & Margaret C Mosher Foundation  
 Santa Barbara Unified School District

### \$1,000–\$2,999

Union Bank  
 Bank of America  
 Charles Biesanz  
 John & Kandace Illgen  
 Austin Lampson

Cliff and Diane Lundberg  
 Steve & Amber Ortiz  
 David and Cristina Prichard  
 Maryan Schall  
 Anne Smith Towbes  
 Jim and Marcia Wolfe

### \$1–\$999

Susan Aguilar  
 Automobile Club of Southern California  
 Arturo Briceno  
 City of Goleta  
 Michael Shaner  
 Robert Katy Zappala  
 1 Anonymous Donor

## Fun in the Sun Service Delivery Partners



Adelante Charter School  
 Aha!  
 Art with Louie  
 Assistance League of Santa Barbara  
 Bike Coalition  
 Buellton Union School District  
 Burrito Loco  
 Cancer Center of Santa Barbara  
 Carpinteria Unified School District  
 College Elementary School District  
 Cottage Health  
 Dave's Dogs  
 Dunes Center  
 Everybody Dance Now  
 Explore Ecology  
 Fighting Back Santa Maria Valley  
 Goleta Sanitary  
 Goleta Union School District  
 Hospice of Santa Barbara  
 Inner Warrior Project  
 Issac Hernandez - Mercury Press  
 Key Class  
 Kind Mind  
 Lions Club  
 MarBorg  
 Montecito Bank & Trust Financial Literacy  
 Mr. Numbers  
 NatureTrack  
 One Cool Earth  
 Performing Arts  
 Procore  
 Santa Barbara Beach Yoga  
 Santa Barbara Unified School District  
 Santa Maria Library  
 Santa Barbara Botanic Garden  
 Santa Barbara Public Library  
 Scholarship Foundation of SB  
 SEEAG  
 Solvang School District  
 Spread Goodness  
 The Juicy Life Yoga  
 TLC Foodbank  
 TreeTop Yoga  
 TVSB  
 UCSB EAOP  
 Veggie Rescue  
 Yoga Movement

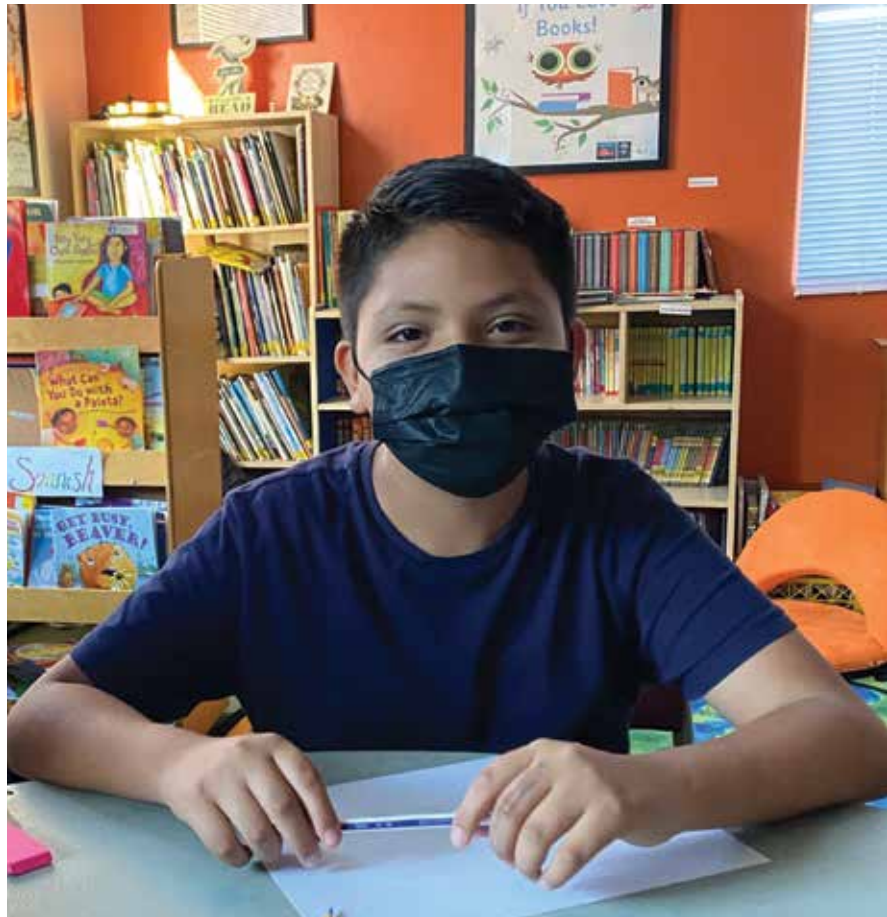


## United Learning Center



The United Learning Center, a tutoring center inside the United Way facility with

satellite classrooms at local schools and community centers, was created to address the needs of academically struggling students who had challenges accessing affordable, effective tutoring. The program's relaunch came at a critical time due to the pandemic's prolonged school closures. During the pilot phase in 2020, the program served Harding Elementary School's high-need first graders who missed much of their kindergarten year, a crucial learning period for young children. During the pilot, all participants gained an average of 2.3 reading grade levels. In 2021, the program continued expansion and now operates at three sites throughout the county. Over 150 local students have already been served at the United Learning Center.



**“With their proven track record, we have 100% confidence in UWSBC’s ability to continue powerful educational support for local students through this collaboration. Stable affordable housing coupled with educational opportunities are foundational to the success of our resident youth.”**

*— Rob Fredericks  
CEO of HACSB*

## Early Learning Success Institutes



To help address pandemic-related learning loss, United Way has coordinated with school districts to expand its kindergarten-readiness programming to address the needs of even more of the County's youngest students through the **Early Learning Success Institutes (ELSI)**. For the first time in the program's 20-year history, ELSI programming served approximately 300 students in grades K-2 in the summer of 2021 in school districts throughout the County. At each site, a certified teacher and instructional aide work with small groups of students to support basic skills (i.e., sharing, numbers, colors, letters, early literacy, etc.). Teaching is individualized to address each student's particular presenting needs. To help students maximize their progress, ELSI expanded its services this year and will operate in tandem with the United Learning Center, United Way's tutoring center. ELSI students participate in small group tutoring sessions with United Way instructors to work on personalized lesson plans. In addition, students will practice and develop social-emotional skills and mindfulness to better cope with lingering stress due to school closures.



### Program Goals

- Familiarize children with classroom activities and the school setting
- Help them to overcome their fear of being away from home
- Build important skills needed for successful early learning
- Develop early literacy skills
- Improve English skills
- Effectively engage parents and families in their child's education
- Connect families with community resources
- Overcome learning loss associated with the COVID-19 pandemic and virtual learning difficulties

## United for Financial Empowerment



United Way leads a network of 13 nonprofit organizations, financial institutions, and 150 IRS-trained volunteers who are committed to helping Santa Barbara County's lower-income residents build long-term financial stability. The partnership provides financial literacy education, access to affordable financial services, and the Volunteer Income Tax Assistance (VITA) program.

Each year, the VITA program provides over 1,000 local households with free tax filing services. IRS-certified volunteers guide participating residents through the tax process, from collecting documentation to reviewing and filing both federal and state returns. United Way works closely with partners like the Housing Authority of the City of Santa Barbara to provide these services to the community. In 2021, 1,362 local households received over \$2 million in tax refunds. Many families established savings to cover emergencies, college, or retirement.

**\$2,065,586**  
in  
**federal refunds**  
in the  
2021 tax season

**1,362**  
tax returns  
filed

**\$409,060**  
in EITC  
tax credits



## Crisis Response & Recovery



The devastating effects of the COVID-19 pandemic exposed an urgent need for services and local leadership in the distribution of aid for families throughout the County. As a result of an expanded focus in the field of crisis response, United Way was able to magnify its role as a community leader in recovery efforts. From the expansion of new programs in rent relief, childcare, and innovative government partnerships, United Way leveraged a diverse network of partners and resources to quickly adapt to the changing needs of residents. In collaboration with local individuals, organizations, disaster response officials, the County of Santa Barbara and other municipalities, United Way has raised or managed over **\$51.3 million** to support households in need since the start of the

**“Since the response letter me and my family have been blessed with secured housing. And one step closer to being able to provide the constant stability in all aspects for our goal of self sufficiency.”**

*— Local Family, Grant Recipients*

pandemic. United Way remains committed to identifying emerging challenges, establishing dedicated networks of resources and leaders, and investing in new collaborative strategies that directly support families, organizations, and school districts in need.

### Adapting Existing Programs

Substantial adaptations of our core programs were implemented to continue serving our communities effectively in the new and challenging COVID-19 environment.

### Critical Needs Fund

When the pandemic first struck, United Way joined with the County Public Health Department and the James S. Bower Foundation to create the Critical Needs Fund— a collaborative partnership that enabled government and philanthropic leaders to connect regularly and explore strategies to partner and invest in response to urgent needs.

**Learn more at [unitedwaysb.org/CNF](https://unitedwaysb.org/CNF)**

### Rent, Utilities, and Relocation Assistance

Since May of 2020, United Way and local governments have been quickly and efficiently delivering direct financial assistance for rent, utility, and relocation to help keep vulnerable residents housed and stable during this crisis.

**Learn more at [unitedwaysb.org/COVID-19](https://unitedwaysb.org/COVID-19)**

### Vaccination Equity Project

The Vaccination Equity Project was an initiative launched by United Way and its partners in March of 2021. The goal of the project was to address disparities in vaccination rates that emerged as local health officials worked to vaccinate Santa Barbara County residents.

**Learn more at [unitedwaysb.org/CNF](https://unitedwaysb.org/CNF)**

**7,800+**  
HOUSEHOLDS

received financial assistance from United Way

**\$34**  
MILLION

has been distributed directly to individuals and families since May 2020

**45+**

foundations, organizations, school districts, & municipalities joined United Way in response efforts

**38,000+**  
STUDENTS

have received essential academic support to combat pandemic-related learning loss

Note: All numbers are as of April 2022.



### Individual Disaster Assistance Grants

With the COVID-19 outbreak, many families faced economic crisis. Rapid, concrete support was critical. In March 2020, United Way partnered with the Hutton Parker Foundation, the Santa Barbara Foundation, and other philanthropic leaders to launch a program to give direct cash grants to individuals and families who were struggling.

**Learn more at [unitedwaysb.org/covid-19-joint-response-grants](https://unitedwaysb.org/covid-19-joint-response-grants)**

### Learning & Enrichment Centers Collaborative

To support working parents during pandemic-related school closures, United Way launched the Learning & Enrichment Center Collaborative (LECC),

which continued until April 2021 when schools began to reopen. The Centers provided access to technology and the internet, adult supervision, learning support, social-emotional skill development, access to food, enrichment, exercise, and more.

**Learn more at [unitedwaysb.org/LECC](https://unitedwaysb.org/LECC)**

### Emergency Child Care Initiative

In partnership with the Audacious Foundation and the Natalie Orfalea Foundation, United Way facilitated childcare for essential Santa Barbara County employees. The initiative raised \$685,000 to provide services for up to 278 children.

**Learn more at [unitedwaysb.org/covid19](https://unitedwaysb.org/covid19)**

## COVID-19 Crisis Response Donors

### \$1 Million +

County of Santa Barbara  
City of Santa Barbara  
1 Anonymous Donor

### \$500,000 to \$999,999

Hutton Parker Foundation  
James S. Bower Foundation  
Zegar Family Foundation

### \$250,000 to \$499,999

Audacious Foundation  
City of Goleta  
1 Anonymous Donor

### \$100,000 to \$249,000

Yardi Systems, Inc.  
The Natalie Orfalea Foundation  
Wood-Claeyssens Foundation  
The Towbes Foundation  
Guadalupe Union School District  
La Centra-Sumerlin Foundation  
2 Anonymous Donors

### \$50,000 to \$100,000

G.A. Fowler Family Foundation  
Henry E. & Lola Monroe Foundation  
June G. Outhwaite Charitable Trust  
Linked Foundation  
Manitou Fund  
Lewis-Towbes Family Fund  
1 Anonymous Donor

### \$25,000 to \$49,999

Goleta Union School District  
California State Controller's Office  
Gerry and Bobbie Rubin  
Montecito Bank & Trust  
Deckers Outdoor Corporation

Hope Elementary School District  
Roy and Ida Eagle Foundation  
Tony and Kyra Rogers Foundation

### \$10,000 to \$24,999

Wells Fargo Bank  
Farmers and Merchant Trust Company  
Ms. Sandra Lynne  
Orange County Community Foundation  
The Ann Jackson Family Foundation

### \$5,000 to \$9,999

Fidelity Charitable  
Ms. Lee Heller  
Mr. and Mrs. William Cabeen, Jr.  
Siri and Bob Marshall  
Maryan Schall  
All Saints By The Sea Episcopal Church  
Carla Amussen  
Bank of America  
Dylanian II Donor Advised Fund  
P D Jackson Family Foundation  
Samuel B & Margaret C Mosher Foundation  
Union Bank

### \$1,000 to \$4,999

Ms. Melinda Burns  
Ms. Gwen T. Dawson  
McCune Foundation  
Rickershauser Family Fund  
Geoff and Polly Bloomingdale  
Karen A. Lyons and Robert A. Ettinger Charitable Fund  
Mrs. Elizabeth B. Denison  
Belle Hahn, The Little One Foundation  
William and Deirdre Arntz  
American Riviera Bank  
Raymond James & Associates, Inc.  
Bernard Roth

Rabbi Stephen and Marian Cohen  
Mr. Steve Schaefer  
Mr. and Mrs. Jean-Pierre Fouque  
AGIA Affinity  
Garrick and Pam Lewis  
Kelly Sullivan  
Ms. Gail Arnold  
Joyce Carnovale  
Coast Hills Community Foundation  
Helen Couclelis  
Paul and Bobbi Didier  
Alan and Patricia Griffin  
Susan and Rod Hersberger  
Alex Holler  
LogMeln  
Art and Carolyn Merovick  
Michael and Betty Noling  
Charles and Rhonda Jo Pickle  
Rotary Club of Montecito  
Mr. John Ummel  
Ms. Elise Unruh  
Dianne and Daniel Vapnek Family Fund  
Grant Walker  
Mike Weissman  
Jim and Marcia Wolfe  
Mr. and Mrs. Worster  
2 Anonymous Donors

For a full listing of COVID-19 donors, please visit [unitedwaysb.org/recognition](https://unitedwaysb.org/recognition)

Recognition reflects United Way of Santa Barbara County contributions received from January 1, 2020 to March 30, 2022

## Red Feather

Red Feather Ball guests gathered in person for the first time in two years for the 24th annual Red Feather event, held on October 8th, 2021. The event was hosted at the private estates of Xorin Balbes and Truman Davies and Michael and Nati Smith. 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 learning program and the local United Learning Centers. For the 2021 campaign, United Way **raised a total of \$225,000.**



## Red Feather Reception Sponsors

### Platinum Feather - \$15,000

Belle Hahn  
Lily Hahn  
Stafanie & David Jackson  
Zegar Family Foundation

### Gold Feather - \$10,000

City National Bank

### Silver Feather - \$5,000

ExxonMobil  
John & Susan Hanna  
Judy & David Jones  
Montecito Bank & Trust  
Santa Ynez Band of Chumash  
Indians Foundation  
Tanya Thicke  
Village Properties  
Zia Group

### Bronze Feather - \$2,500

AGIA Affinity  
Adams Family  
Sue & Dr. Edward Birch  
Teran Davis & Rand Rosenberg  
Paul & Bobbi Didier  
Casa Dorinda  
Teri Jory & Seth Geiger  
Nadine & Aaron Gilles  
GRAVITAS Love Coaching  
Katie & Bassem Hamdy  
Ashley & Scott Harcourt  
Jenny & Matt Hudson  
Judy & David Jones  
Marc Jones  
Bonnie Star & Les Joseph  
Marsha Kotlyar  
Shari Liu & Fred Fellows

Diane & Cliff Lundberg  
Dale & Mike Nissenson  
Northern Trust  
Libby Aubrey & Fredrick S. Porter III  
The Quiveys & OSI Global  
Santa Barbara City College Foundation  
Santa Barbara Foundation  
Lily Phillips & Jonah Shacknai  
Anne Towbes  
Marcia & Jim Wolfe

### Honorary Sponsor

Maryan & Caryn Schall

## Women United



The Women United affinity group celebrated a new era of women-led philanthropy in the Santa Barbara community. Members of the organization work to strengthen United Way's programs and initiatives in academic support and resources for students throughout the community.

### Leadership Team

Shari Liu Fellows, Chair	Carly Walters	Erin Murphey
Kristen d'Offay	Tanya Thicke	Erin Moy
Holly Onak	Elisa Bartron Hills	Katie Hamdy
	Vanessa Ringel	Andria Kahmann


## Young Leaders Society

The Young Leaders Society (YLS) promotes professional development with a focus on community building. Membership in the group connects young professionals throughout the county with opportunities for networking and mentorship and aligns members with volunteer positions to support United Way's education and literacy initiatives. Aligning professional development with philanthropy and volunteerism is a core tenant of a more resilient community. In 2021, 163 members joined the group for various networking and development events and participated in the Lunch Bunch mentorship opportunity during the Fun in the Sun summer learning program. Annual YLS membership yields over \$70,000 in contributions to support United Way's community programming.





# Executive Club

 <b>Bryan S. Anderson</b> Santa Ynez Unit Asset Manager ExxonMobil Bronze	 <b>Dr. Gayle Beebe</b> President Westmont College Bronze	 <b>Donald A. Bennett</b> Chief Executive Officer Platinum Insurance Marketing Silver	 <b>Terri L. Bennett</b> President Platinum Insurance Marketing Silver	 <b>Ronald J. Boehrs</b> Chief Executive Officer ABC-CJO Alexis de Tocqueville	 <b>David J. Borgatello</b> Vice President Marlberg Industries Bronze	 <b>Brian D. Borgatello</b> Vice President Marlberg Industries Bronze	 <b>Mario A. Borgatello</b> President Marlberg Industries Bronze
 <b>Kathleen Borgatello-Koepfer</b> Community Outreach Marlberg Industries Bronze	 <b>J. Christopher Burke</b> President & CEO AGA Affinity Bronze	 <b>Vince Caballero</b> Regional Manager Union Bank Bronze	 <b>Laura Canfield</b> VP of Patient Care Services & Chief Nursing Officer Cottage Health Bronze	 <b>Julie L. Capritto</b> Chief Operating Officer, Sr VP AGA Affinity Alexis de Tocqueville	 <b>Andy Chou</b> President Northern Trust Bronze	 <b>Cassandra Corral</b> General Manager - SBA Atlantic Aviation Gold	 <b>Benton Daniel</b> Avionics General Manager Abaco Systems Alexis de Tocqueville
 <b>Jeffrey DeVine</b> President & CEO American Riviera Bank Bronze	 <b>Diane B. Dolron</b> Owner Doron Financial Associates Bronze	 <b>Andrew J. Downen</b> Chief Financial Officer AGA Affinity Gold	 <b>Henry Dubroff</b> Chairman & Executive Editor Pacific Coast Business Times Bronze	 <b>David K. Flattery</b> Vice President of Business Development DuPont Displays Silver	 <b>Dennis E. Forstner</b> Sr. Vice President Morgan Stanley Wealth Management Bronze	 <b>Robert S. Freeman</b> Chief Executive Officer CenCal Health Bronze	 <b>Maria M. Gardner</b> Deputy Director, Social Services County of Santa Barbara Bronze
 <b>Janet A. Garofa</b> Chief Executive Officer Monterey Bank & Trust Bronze	 <b>Joseph F. Green</b> Managing Partner Mullen & Herzoff Bronze	 <b>Alan M. Griffin</b> Branch Manager Raymond James & Associates, Inc. Silver	 <b>Lee P. Hamill</b> Sr. VP Regional Manager City National Bank Silver	 <b>Joseph E. Holland</b> County Clerk, Recorder & Assessor County of Santa Barbara Bronze	 <b>Donna A. Jeneaga</b> Director of Critical Care Services Cottage Health Bronze	 <b>Peter C. Jordano</b> Chief Executive Officer Jordano's Inc. Silver	 <b>Alex Kaper</b> President & CEO Global Mortgage Group Bronze
 <b>George B. Lelo</b> Chief Operating Officer & President Monterey Bank & Trust Bronze	 <b>Dr. Sharon K.L. Lutz</b> VP Quality Support Services Cottage Health Bronze	 <b>Garry L. Mac Pherson</b> Vice-Chancellor of Administrative Services UCSB Bronze	 <b>Scott D. McGulpin</b> Department Director, Public Works County of Santa Barbara Bronze	 <b>Mana Hatsuiko Miyasato</b> County Executive Officer County of Santa Barbara Silver	 <b>Lisa M. Moore</b> Executive Vice President & COO Cottage Health Silver	 <b>John W. Morrisett</b> Retired Tax Partner Danzon, Brooks, Nightingale, Turner & Morrisett, CPAs Bronze	 <b>Kevin L. Nelson</b> Chief Compliance Officer Cottage Health Alexis de Tocqueville
 <b>Amber K. Ortiz</b> Senior Vice President - Team Lead City National Bank Gold	 <b>Steve Ortiz</b> President & CEO United Way of Santa Barbara County Gold	 <b>David A. Prichard</b> Senior Vice President Bank of America Silver	 <b>Susan Roe</b> VP, Marketing AGA Affinity Silver	 <b>Caroline Rosen</b> Director of Patient Safety & Accreditation Cottage Health Bronze	 <b>Gary Simpson</b> Vice President & General Manager Home Improvement Center Gold	 <b>Georgette Sims-Moran</b> Executive Director First & County of Santa Barbara Bronze	 <b>Bruce A. Stevens</b> EVP CFO/CAO Monterey Bank & Trust Bronze
 <b>Marshall H. Turner</b> Tax Partner Danzon, Brooks, Nightingale, Turner & Morrisett, CPAs Bronze	 <b>Dr. Mary Jean Vignone</b> President & Executive Coach Success Reach, LTD Bronze	 <b>Steve D. Wagner</b> Assistant General Manager Goleta Sanitary District Bronze	 <b>Ronald C. Werft</b> President & CEO Cottage Health Bronze	 <b>Nancy Warner</b> President Reliable Engineering Services Gold	 <b>Scott Whitaker</b> Sr. VP Business Development AGA Affinity Bronze	 <b>Cara Williams</b> VP Human Resources & CHRO Cottage Health Bronze	 <b>Daniel Zia</b> CEO & Broker-Associate The Zia Group Gold

We are grateful for the significant contributions these local public and private sector leaders made through their personal and organizational commitment to United Way and our Santa Barbara community in 2020/2021.

## Top Contributing Workplaces

AGIA Affinity	\$158,709
County of Santa Barbara	\$133,695
Cottage Health	\$133,135
UCSB	\$92,549
Yardi Systems, Inc.	\$40,000
Montecito Bank & Trust	\$37,956
United Parcel Service	\$25,328
Costco	\$24,210
MarBorg Industries	\$23,257
City of Santa Barbara	\$23,068
Bank of America	\$20,000
Edison International	\$20,000
City National Bank	\$19,795
Greenfield Learning	\$15,947
Assistance League of Santa Barbara	\$15,000
Damitz, Brooks, Nightingale, Turner & Morrisset	\$13,277
Raytheon Electronic Systems	\$12,295

Workplace giving is essential to the success of United Way of Santa Barbara County's community initiatives. These are the largest contributing workplaces, along with their total gifts from the 2020 campaign.

Goleta Sanitary District	\$10,712
Union Bank	\$10,000
Albertsons	\$10,000
Sansum Clinic	\$10,000
The Zia Group	\$9,750
United Way of Santa Barbara County	\$9,046
Atlantic Aviation	\$9,000
QAD	\$8,268
Google	\$8,100
Wells Fargo Bank	\$7,500
Aera Energy LLC	\$7,000
Reliable Engineering Services	\$6,500
Deckers Outdoor Corporation	\$6,000

The figures above reflect United Way of Santa Barbara County Annual Campaign pledges received between July 1, 2020 and June 30, 2021

## Community Partners

AARP Tax-Aid	Delgados	Northern Trust
American Indian and Health Services	Dollywood Foundation	Notre Dame School
Bechtel	Domestic Violence Solutions for Santa Barbara	Olive Grove Charter School
Boys and Girls Club	Eastside Library	Our Lady of Mt Carmel
Boys and Girls Club of the Mid Central Coast	ExxonMobil	People Helping People
Carpinteria Public Library	Family Partnership Charter School	PMD Group
CenCal Health	Family Service Agency	Santa Maria Valley YMCA
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Since 1982, a premier group of volunteer estate and financial planning professionals have assisted United Way of Santa Barbara County in offering a variety of ways for individuals to fulfill their philanthropic desires. These gifts provide perpetual support for United Way's innovative programs that improve the lives of children, families, and seniors in our community.

If you're ready to plan your will and trust, we would like to offer our Free Estate Planning Workbook to help you prepare for important life decisions in an easy-to-understand, step-by-step manner. To request your copy, visit [unitedwaysbgift.org/estateguide](https://unitedwaysbgift.org/estateguide).

# Heritage Club



The Heritage Club was established in 1982 as one of the first United Way planned giving societies in the country. It honors those forward-thinking individuals who choose to improve the lives of other by making planned giving commitments in their estate plans. This vital group of donors has helped United Way of Santa Barbara County’s endowment grow to more than \$10 million.

**By virtue of their generosity to United Way of Santa Barbara County, the individuals listed are recognized as members of the Heritage Club in perpetuity.**

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Recognition reflects United Way of  
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# Leadership Circle

Composed of donors who have made gifts of \$1,000 or more to United Way of Santa Barbara County, Leadership Circles drive important change in our community. Their generosity helps to support United Way’s community programs like Fun in the Sun, the United Learning Center, and the Early Learning Success Institutes.

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**L** indicates a legacy gift



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United Way of Santa Barbara County receives many types of gifts. The generous donations from those listed on this page came in the form of goods, services, and media coverage.

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Veronica Sams  
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Pedro de la Cruz  
El Encanto Hotel & Garden Villas  
Explore Ecology/Art From Scrap  
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Jump on the School Bus  
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One Cool Earth  
Scholarship Foundation of Santa Barbara  
The Key Class  
Turner Medical Arts

### \$500–\$999

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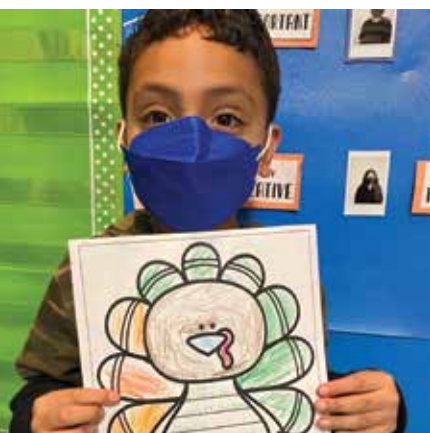
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## Partnership Success Stories



**When we first met Julian** (Kindergartener) at the United Learning Center (ULC), he was struggling with his ABCs and was shy about learning. He was often frustrated with himself and was quick to give up on difficult skills. ULC tutors were worried about his benchmarks, as he was far behind his grade-level peers and even fell behind some of some students in lower grade levels.

From day one at the ULC, tutors worked closely with Julian to provide one-on-one attention and care. His educator team brainstormed new ideas to make learning engaging and less intimidating. Within the first few weeks, staff started seeing positive changes. With the individualized support, his ABCs and literacy skills began to improve, and more importantly, leaders also saw increased enthusiasm and confidence for learning. After a couple of months, Julian reported his favorite part of his day at the ULC was “Homework Time” and during a Thanksgiving activity, he told tutors that he was grateful for “Homework, School, and his Backpack!” At the conclusion of the semester, Julian measured in line with grade-level literacy goals and gained confidence in the classroom, engaging with peers and tutors.



**Max struggled on his first day of Fun in the Sun.** He was crying and refused to go into his classroom, struggling with being away from home for the first time. Max’s mother explained to me that Max had a tough time with virtual learning and an even harder time making friends. He was terrified of being around other kids and questioned if the other kids would like him. For the first week of the program, Max’s mother would stand outside the gate and watch Max as he cried for her and sat by himself away from the other kids. The Fun in the Sun staff worked together to make sure Max felt welcomed, engaged, and encouraged to find his place in the group at his own pace. Max’s mother expressed her gratitude

to the Fun in the Sun staff for their patience and kindness. By week three of the program, Max’s mother couldn’t believe the changes she saw in her son. Max loved the program and talked all the time about his new friends. What Max’s mother was even more grateful for was the opportunity to practice his math and reading. Since Max struggled with distance learning, she knew he was behind in his academics. At the end of the program, Max’s mother thanked the Fun in the Sun staff for providing such a wonderful and unique experience for her son.

“One of our TK children Elijah who had just turned 5 enrolled in my tutoring session. He was awarded the Harding Hawks award for most improved and knowing all his letter sounds. I am very proud of him. He is a great learner! I was thanked by his teacher and his dad for all his improvement. I thanked them all with a big smile.”

— Stephanie  
United Learning Center Tutor

“It was incredibly difficult. Families were facing a crisis. Fun in the Sun for many of our families has been a gift. Our students were able to learn skills such as bike riding. While it helped them with the skills of riding bikes, it also helped them with their confidence, which is so vital during this time. What we’re noticing is that the students who participate in the Fun in the Sun program are having very little problems returning back to school.”

— Dr. Emilio Handall  
Superintendent,  
Guadalupe School District



## Santa Barbara County

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# Our Mission

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To enrich the lives of children and families and build resilient communities by leading local programs and partnerships that improve school readiness and academic achievement, financial empowerment, and crisis response and recovery.



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