

Yesterday, Today, and Tomorrow

Organizational Description

April 2008

I. Snapshot: United Way Today

United Way of Santa Barbara County's Strategic Planning Process 2005-2008 brings a new vision and mission statement, and clearly defined core values.

Vision: In our community, everyone has a hopeful future.

Mission: Right here, right now, with the *Power of Partnership*[™], we are improving lives for children, families, seniors and you!

Core Values:

Caring – We are committed to people helping people every day...one generation voluntarily and compassionately paving the way for future generations.

Innovative – Using the *Power of Partnership*[™], we connect strengths, multiply resources, and create the best ways to make measurable improvements in local lives.

Trustworthy – we are the finest stewards of your donated time, ideas, and money.

Leadership – we initiate, influence, and support desired positive changes in our neighborhoods and communities.

Background to the Strategic and Business Plans

United Way of Santa Barbara County (UWSBC) is an independent, community-based organization that has dedicated itself to strengthening the Santa Barbara community and bettering the lives of those in need since its inception in 1923. UWSBC receives charitable gifts from over 8,000 individuals and 200 employers contribute. Formerly a traditional United Way organization focused solely on fundraising and grant making, UWSBC has succeeded in transforming itself into an organization that serves as a multi-faceted catalyst for collaboration and grassroots change. Formerly a traditional United Way organization focused primarily on fundraising and grant making, UWSBC has succeeded in transforming itself over the past several years into an organization that serves as a multi-faceted catalyst for collaboration and grassroots change. Today, UWSBC builds innovative partnership programs, helps fund and staff them, and coordinates services to meet the real needs of our communities.

Towards the achievement of our mission and vision, we seek to craft effective agendas within and across communities; build coalitions around these agendas; and increase investments of time, money, and ideas in these agendas.

During 2007-2008, UWSBC has been involved in coordinating, directing, and/or participating in more than twenty-eight collaborative, strategic initiatives positively impacting the lives of local people. In addition, we partner with many local organizations to provide a network of more than eighty interrelated health and human services centering around child and youth development, families, frail seniors, safe communities, health care, and changing the underlying community conditions giving rise to crisis situations in people's lives. Furthermore, each year UWSBC recruits approximately 2,000 volunteers to help achieve our mission and vision. All told, the services we help provide each year touch more than 80,000 people or one out of every three members in our primary

service area of Santa Ynez Valley to Carpinteria. Our secondary service area is the entire county, with eleven county-wide projects underway.

In 2005, UWSBC began an extensive planning process to create a new strategic plan and business plan designed to optimize the positive impact of the organization in the local community. Over the years, UWSBC has repeatedly transformed itself to correspond to shifting patterns in our community's overall environment so that we could serve our community in the most effective manner. However, the rapidity of these changes has increased dramatically in the past decade. Accordingly, our Board of Directors realized that not only is it important to react appropriately to a changing environment, but to plan for future success. With this in mind, UWSBC began its strategic planning process to ensure that the organizational mission, vision, values, and strategic plan are in accord not only with the lessons learned from recent changes but also with what 1.) the community needs; 2) what donors want; and 3) the environment will support. To help design and implement the strategic and business planning process, UWSBC retained the services of national consultant Dirk Van Den Bosch of Van Den Bosch & Associates.

To help create the new strategic plan, UWSBC solicited and received ideas, suggestions, input, and feedback on our role in the community from more than 1,200 local individuals and hundreds of organizations. These ideas were synthesized into the basic message of our strategic plan and vetted through the Community Annual Campaign. In January, 2007 UWSBC's Board of Directors formally adopted the new Strategic Plan consisting of our new Mission, Vision, Values, and core organizational goals and aspirations.

II. Building on a Strong Foundation: Our History of Caring

In 1923, local community members came together to unify their efforts in addressing the needs of the people of Santa Barbara County, and formed the Santa Barbara Community Chest. At that time, the Community Chest benefited nine local charities. In 1925, the Community Chest aided the survivors of the 6.3 earthquake that shook Santa Barbara, which destroyed downtown businesses and damaged many homes. Nine years later in 1934, the Santa Barbara Community Chest was looked upon as one of the most outstanding Chests in the country. That year, one out of every six people in Santa Barbara was a contributor, making it the second highest per capita donor group in the country. In 1942 the Community Chest joined the War Chest campaign to assist during the wartime emergency. A few years later the War Chest dissolved, and Santa Barbara's Community Chest went on to adopt the Red Feather as a symbol of giving.

In 1955 Jack Rathbone was elected President of the Community Chest, and remained on the board of directors through 1969 when the Community Chest of Greater Santa Barbara became United Way of Santa Barbara County. 1973 brought about the Loaned Executive program which started with businesses such as Santa Barbara News Press, Santa Barbara National Bank and IBM, which loaned executives to United Way for the purpose of growing the fundraising potential of the organization.

In 1974, Paul Didier began his career with United Way of Santa Barbara County, and was named Executive Director the following year. United Way surpassed the one million-dollar mark in annual contributions in 1980, and established a nationally recognized Endowment and Planned Giving program in 1982. The following year United Way collaborated to launch the first women and children's homeless shelter in the tri-counties. In 1983, United Way of Santa Barbara County launched a campaign to purchase a permanent headquarter facility, and on July 24, 1986 UWSBC moved into the facility at 320 E. Gutierrez Street. The Board established the Building Maintenance Endowment Fund, which would create a perpetual fund that could pay for maintaining the structure.

Sixty five community volunteers served at the first annual Day of Caring in 1991, and 16 years later more than 1,200 volunteers provide needed services at 48 charitable worksites throughout the county. In 1992 United Way coordinated services and direct assistance to 698 survivors of the Painted Cave Fire. The first Linkages multi-agency grants were awarded by United Way in 1994.

1997 was the beginning of a new era with the First Annual Red Feather Ball. It also marked the beginning of the first UWSBC led multi-agency initiative, the Fun in the Sun summer enrichment program for homeless and poverty level children in Santa Barbara, for which the proceeds from the Red Feather Ball are used. In 2001 this program was expanded with the launch of an after school homework and tutoring program, Project Learn/A-OK. That same year, Fun in the Sun and Project Learn/A-OK reached 250 unduplicated children and teens at three sites. Twenty-six public and private agencies joined the effort. As of 2008, more than 2,000 children have benefited from the nationally ranked summer learning loss program.

United Way of Santa Barbara County has a long history reflecting the experience necessary to assume the responsibilities recommended in this plan. A partial list of significant long-term results during the past thirty years include: merger assistance, emergency assistance, and partnership innovations.

Mergers

UWSBC has played a significant role in a variety of nonprofit mergers. Some of the organizations involved include Boys and Girls Clubs, Hospice of Santa Barbara, Visiting Nurses, both Goleta and Santa Barbara Girls Inc., Community Resources Information Service, Helpline, Klein Bottle Youth Programs, Social Advocates for Youth, and Family Service Agency.

Emergency Assistance

UWSBC has helped a number of local charities “turn the corner” when they were faced with unexpected financial problems. Some of the organizations helped include: Shelter Services for Women (now Domestic Violence Solutions), Goleta Girls Club, Community Resources Information Service, Helpline, Rape Crisis Center, Visiting Nurses, Boy Scouts, East Lift, and YMCA.

Partnership Innovations

UWSBC has helped launch a variety of new services through our work with local organizations and individuals. Some of those innovations include opening the first women and children’s homeless shelter in the tri-county region, creating more than 500 new infant and preschool position, launching the creation of a senior daycare center in Santa Ynez Valley, creating effective food collection programs involving youth, opening youth programs to disabled populations, crafting the first common grant application used by both public and private sector funders, revolving loan fund for homeless or near homeless families, and launching a coordinated jobs program and preschool program for homeless families.

III. Volunteers and Staff

Each year UWSBC recruits more than 2,000 volunteers to help achieve its mission and vision. Hundreds of these volunteers, contributors, and recipients are also integrally involved each year in ensuring that UWSBC maintains the highest financial standards by serving on the Board of Directors and other volunteer committees.

United Way of Santa Barbara County's Board of Directors

The United Way's Board of Directors is comprised of a group of up to 31 community leaders from a variety of industries, sectors, demographics, and backgrounds. Within the diversity they have one important focus in common: an extremely high level of dedication and commitment to using their strengths and talents in partnering with United Way to have a positive affect on the lives of local people. Below are bios and photos of our board members.



James L. Armstrong
City Administrator
City of Santa Barbara

In October 2001, James L. Armstrong was appointed to the position of City Administrator for the City of Santa Barbara. In that capacity he acts as the Chief Executive Officer of an organization with over 1,000 employees and an annual budget of \$250 million.

Jim received his education at UCLA, where he earned his BA in both Political Science and Psychology. After attending UCLA, he obtained his Masters Degree in Public Administration at Cal State Long Beach. Prior to being appointed in Santa Barbara, Jim served as City Manager of both Fullerton and Hanford California, and also served as Assistant City Manager of Anaheim.

Jim was honored as the Public Administrator of the Year in Orange County in 1993 and served as President of Orange County's City Manager's Association in 2000. He has also taught graduate level Public Administration at both Cal State Long Beach and Cal State Fresno. Along with his professional achievements, Jim is a member of the International City Management Association, Rotary International, the Aircraft Owners and Pilots Association, and the Baja Bush Pilots. Jim's wife Linda is a banker and they reside in Santa Barbara.



Charles A. Bischof

Charles Bischof is a seasoned executive with broad experience and significant accomplishments at the executive management level in high tech start-ups and Fortune 500 companies. Mr. Bischof has over 25 years of experience in high tech medical, wireless and electronic hardware in business operations and manufacturing, ranging from start-up operations to business development, high volume manufacturing, process control and maturity.

Most recently he was co-founder and CEO of a company which developed ferroelectric materials used in RF circuits for commercial and DoD wireless applications. Previously he was co-founder and President of a miniature optical heads-up display company. Other senior level positions in his resume include Vice President Operations at semiconductor equipment, medical device and aerospace systems companies. His credentials include a BS degree in Business Management, Cal-State University San Jose, and a Masters of Business Administration from Golden Gate University.



Thomas Brashears
Community Volunteer

Tom Brashears is retired, formerly serving as chairman and majority owner of THE OFFICE MART, a tri-county distributor of office supplies and office furnishings. He has served as President of United Way of S.B. County, Santa Barbara Chamber of Commerce, and Rotary Club of Santa Barbara. Brashears earned a bachelors degree in Business and Finance from USC.



Michael F. Brown
County Executive Officer

Michael Brown is a life long local government professional with 35 years of public service experience. Before being appointed County Administrator of Santa Barbara County in 1996 he served as City Manager of the City of Tucson Arizona, City Manager of the City of Berkeley California, Deputy City Manager and Director of Public Safety of Hartford, Connecticut. He also served as Chief Deputy Commissioner of Housing of the State of Connecticut, Department of Housing.

Mr. Brown's civic involvement includes Chair of Santa Barbara County's Annual Community Campaign for 2003/4. He concurrently serves as a member of the United Way Board of Directors and has Chaired United Way's Public Sector Campaign for the past five years. He is a member of the Board of Directors of the Economic Community Project. Member of the Steering Committee of the Fighting Back Anti-Drug and Alcohol Initiative and as a member of the Vestry of St. Mark's in the Valley Episcopal Church. On a national level he is Vice President of the Board of Trustees of the Commission on Fire Department Accreditation International, and Chair of the International City/County Management Association's Center for Performance Measurement in local government.

Brown was educated at Santa Monica Public High School (SamoHi), the California State University at Northridge, and the University of California at Berkeley. Additionally, he holds a Master of Arts in Public Administration from the University of Texas at Austin. He holds professional certificates from the University of Connecticut Institute of Public Affairs; the New York University Real Estate Institute; the Yale School of Organization and Management; and the University of California at Berkeley, Goldman School of Public Policy, Brown is also a Credentialed Manager of the International City/County Management Association (ICMA University).

He resides in the Santa Ynez Valley with his wife of 33 years (Rinda) and his son Zackery who is a freshman at Santa Barbara City College. His daughter Samantha is an actress in Los Angeles and in New York.



Dennis Cagan
Founder and Executive Officer
Santa Barbara Technology Group

Dennis Cagan has been a successful entrepreneur in the high-technology industry for more than 37 years, having founded a dozen different companies. He currently serves as chief executive officer of Santa Barbara Technology Group, a private investment and consulting firm primarily engaged in working with and investing in early-stage technology companies.

Cagan has served as an investor and consultant for more than 23 years, and as a member of more than 36 boards. He is currently on the board of several tri-county companies and organizations, including Commission Junction, Bargain Network, InTouch Health, the University of California, Santa Barbara College of Engineering, the UCSB Center for Entrepreneurship & Engineering Management, and the Central Coast Venture Forum.

Cagan attended the University of California at Los Angeles, where he majored in economics. He is a member of UCSB's Lancaster Society, Santa Barbara City College's President's Council, United Way of Santa Barbara County's CEO Club and Alexis de Tocqueville Society, and is a board member

for United Way of Santa Barbara County. Dennis and his wife Angelia have three daughters and a foster child, and live in downtown Santa Barbara.



Lance Connor
Reliable Engineering Services, Inc.

Lance Connor is a biomedical engineer and biostatistician. He holds dual master's degrees, an MA in Applied Statistics (UCSB, 2003) and an MS in Quality Assurance (CSUDH, 1996). He earned his BS in Engineering at Tulane University. Lance is an ASQ Certified Reliability Engineer, Certified Quality Engineer, Certified Software Quality Engineer, Certified Quality Auditor, and Six Sigma Black Belt. He is a specialist in applying statistical tools to the development of medical technology.

Lance and his partner Nancy Werner, a biomedical engineer and biomaterials scientist, operate a local business, Reliable Engineering Services, Inc. Their company provides technical staffing and engineering support services to medical device manufacturers in the United States and Europe.

Reliable Engineering Services' giving program targets organizations which provide medical care and other human services, both in our local community and worldwide, through highly efficient means.

They began supporting United Way in 1998 through the workplace giving program. In addition to their work for UWSB, the couple is active with Direct Relief International and Doctors without Borders (*Médecins Sans Frontières*).

Nancy and Lance have two children. The entire family participates in Casa Alegria Children's Center on the Santa Barbara campus of St. Vincent de Paul.



William Curtis
Founder and Chairman of SullivanCurtisMonroe

William R. Curtis is founder and chairman of SullivanCurtisMonroe, an insurance services firm with more than 175 insurance professionals employed among its offices in Pasadena, Irvine and Corona, California. His professional career of nearly 40 years spans a wide range of marketing and executive management experience.

Curtis joined The Sullivan Companies, a group of associated organizations involved in different areas of the insurance brokerage business, in 1972. He began as an account executive with Walker & Sullivan in Los Angeles, 1972-1980, then held the position of vice president of Gerald J. Sullivan & Associates in Los Angeles from 1980 to 1986. From 1987 to present, he has served the company in his current position. Prior to joining Sullivan Companies, he was employed by Aetna Casualty & Surety.

A graduate of the University of Southern California, Curtis holds a bachelor's degree in science with emphasis in finance, real estate and insurance. He also attended the Wharton School of Business Management.

Curtis is an active member of several professional associations including the Council of Insurance Agents and Brokers, the National Association of Casualty & Surety Agents, the Professional Insurance Agents and the IBA West. He is also a board member of the United Way and Young Life organizations and served in the U.S. Army in Vietnam from 1968-1969.



G. Paul Didier, CFP

Secretary

President & CEO

United Way of Santa Barbara County

Paul Didier has been President and CEO of United Way of Santa Barbara County since 1978. A Certified Financial Planner, MBA holder, and a former real estate broker and syndicate with his own firm, he has applied for-profit, market driven innovations to United Way and other non-profit organizations. He has been a presenter to local and national United Way and non-United Way conferences on fund raising, marketing, direct mail, leadership giving, planned giving, and computerized information systems. He has consulted with other local United Way organizations as well as hospitals, universities, environmental groups and other types of social service agencies.

His United Way accomplishments include: fifteen years of successful endowment programs, over ten years of direct mail, key designer on six different fund raising software systems (currently working on a seventh), successful capital campaigns for headquarters & flood disaster, performance related evaluation systems, innovative multi-agency, public/private service projects, market & community driven fund distribution systems and low cost donor involvement programs.



Diane B. Doiron, CLU

2nd Vice Chair

Owner

Doiron Financial Associates

Diane has been in the insurance business since 1974 working with individuals, families, business owners and professionals in the areas of risk management, employee benefits, Estate Planning and Long Term Care insurance. She is a recognized expert on Long Term Care issues and solutions. She teaches a class on Long Term Care for SBCC's Adult Ed program, and for the staff at UCSB and at SB City College, and frequently lectures at other Central Coast venues on this subject.

Since 1981 Diane has also specialized in Charitable Estate Planning working directly with many non-profits and their donors. In this capacity she has traveled throughout the state of California helping to secure millions of dollars in charitable gifts.

Diane is a Past-President of both the Santa Barbara Estate Planning Council and the Planned Giving Round Table of Santa Barbara County and is currently the Chair of the Endowments and Planning Giving Committee at United Way of Santa Barbara. She is also a member of the Endowment Committees at both Visiting Nurse and Hospice Care and Santa Barbara City College.

In addition, Diane serves as Treasurer of the Channel City Club and on the Boards of the Beacon of Light Foundation and Life Chronicles. She was a past Board President of United Way of Santa Barbara County where she continues to serve as a member of the UW Management team.



Henry Dubroff

Executive Editor

Pacific Coast Business Times

Henry Dubroff is chairman, editor and majority owner of the Pacific Coast Business Times, the weekly business journal for Santa Barbara, Ventura and San Luis Obispo counties in California. The Business Times has been publishing since March 17, 2000.

Dubroff directs the company's newsroom operations, its community outreach and its corporate finance functions. He founded the company with seven outside investors in October 1999.

He graduated from the Graduate School of Journalism at Columbia University in 1982, where he won a New York Financial Writers Association scholarship. Prior to attending graduate school, he was a teacher and VISTA Volunteer in Holyoke, Mass. and worked for the Knoxville-Knox County Private Industry Council in Tennessee.

He currently serves on the Board of Governors of the Society of American Business Editors & Writers Inc. He is a past president of that organization and co-chaired the successful effort to create the SABEW-Missouri Chair in Business Journalism at the University of Missouri.

He has hired and trained a number of young journalists who now work at news organizations including the New York Times, the Oregonian, the Boston Globe, the Denver Post, Ventura County Star, Reuters, Great Falls Tribune and Rocky Mountain News.



Kent Englert, CPA

Past Chair

Kent Englert is a certified public accountant and a principal at Englert & Associates. He has a bachelor's degree in business administration from the University of Denver. Kent was Senior Managing Partner of McGowan Guntermann for many years. He also has served as CEO of Mission Linen. Kent has been involved with United Way of Santa Barbara County for over 20 years and aside from the Board, he has also served on the Endowment Committee, Volunteer Review, and Campaign Cabinet.

Kent and his wife Jill have two daughters and three grandsons.



Blas Garza, Ed.D.

3rd Vice Chair

**Director of Bilingual Education
California Lutheran University**

Mr. Garza is an Assistant Professor of Education for California Lutheran University. He has held the position of Director of Bilingual Education during his 13 years in this field. Prior, Mr. Garza held the position of elementary school principal for 15 years and spent five years as Assistant Superintendent and Acting Superintendent. He received his B.A. from University of Texas, his M.Ed. from the University of Houston and Ed.D. from University of Southern California. His areas of expertise are education, bilingual education, and teacher training.

Garza became involved with United Way in 1974 as the chair of the Adams School and Franklin Fund, and joined the Board of Directors in 1978. He continues to support the Board and is a Past President, as well as Allocations Chair. Garza is a past president of the Rotary Club of Santa Barbara North, and a board member for both Council of Drug and Alcohol Abuse and the Family Service Agency. He says, "United Way is the only organization that involves volunteers from all walks of life in Santa Barbara and which serves the needs of individuals who find themselves in unfortunate circumstances."



John T. Hanna
Community Volunteer

John Hanna has a degree in electrical engineering from the Kettering Institute. In Goleta he worked in engineering and program management at Delco Electronics and Litton Industries. Hanna, an engineer by trade, once worked for General Motors.

Along with serving as a board member on the United Way of Santa Barbara County's Board of Directors, Hanna is the vice president of the Wildling Art Museum in Los Olivos.

Hanna enjoys playing tennis, walking, History, Art, and Art History. He and his wife, Susan, have two children.



Joe Holland
County of Santa Barbara

Joe Holland was elected to the Office of Clerk, Recorder, and Assessor on March 5, 2002 and reelected on June 6, 2006. As the County Clerk, Recorder and Assessor Mr. Holland oversees a multifaceted department that provides necessary election, recordation and property assessment services to residents of Santa Barbara County.

Educational credentials include a BA in Business Economics and an MA in Economics—both from UCSB. He also graduated from the UCLA Executive Program at the Anderson School of Business.

Mr. Holland holds the designation of a Certified Public Finance Officer (CPFO) from the nationally recognized Government Finance Officers Association. Mr. Holland has served as a United Way of Santa Barbara County volunteer for over 20 years. He currently serves as the Chairperson for the FEMA Emergency Food and Shelter Program.

Joe and his wife Kathy and their children Scott, Bridget, and Michelle live in Goleta.



Richard Nightingale, CPA
Past Chair
Principal
Damitz, Brooks, Nightingale, Turner, & Morrisset

Richard A. Nightingale is a C.P.A with the firm of Damitz, Brooks, Nightingale, Turner & Morrisset. He holds a B.S. degree in accounting from California State University at San Luis Obispo. In 1973 he joined Arthur Andersen's Santa Barbara office and was promoted to tax manager in 1977. Then in 1982 he joined Tom

Brooks and Earl Damitz to form their own firm. Richard serves on the boards of Pacific Capital Bancorp (Santa Barbara Bank & Trust), various charitable private foundations and is a former Board President of United Way of Santa Barbara County. Richard's practice is heavily focused on income, trust and estate planning. He is a member and former Board President of the Rotary Club of Santa Barbara, Goleta Boys & Girls Club, and La Cumbre Country Club. He and his wife Diane have two grown children and enjoy golf, snow skiing, and tennis.



Michael Noling, CPA

Mike Noling is a founding member and a past President and Board member of the Santa Barbara Region Economic Community Project (ECP). The ECP has been focused on resolving South Coast regional issues and increasing the economic vitality and quality of life in Santa Barbara through retention and growth of core high technology businesses in the software, medical devices and telecommunications segments. He is a past President of the Santa Barbara Region Chamber of Commerce, and a member of the Community

Environmental Council Board and Executive Committee. He is a long time member of the United Way of Santa Barbara County's Board of Directors and chairs the Strategic Planning and Audit committees. Mike previously served on the Boards of the Milwaukee and Los Angeles United Ways.

Mr. Noling received a BS in Engineering and an MBA from the University of Wisconsin, Madison, he also is a CPA.

After college, Noling joined Accenture (formerly Andersen Consulting) and became a managing partner with responsibility for the Western US consulting practice. During his career with Andersen Consulting, the Consulting business grew from 100 to 35,000 professional consulting personal. Accenture is the world's leading management consulting and technology services organization.

In September, 1993 Mr. Noling joined Wavefront Technologies as President and Chief Executive Officer and was a member of the Board of Directors. During the next two years, Wavefront completed an IPO and subsequent secondary stock offering and was subsequently acquired by Silicon Graphics.

Mr. Noling has used his experience to assist many businesses by serving on their Board of Directors. His experience includes the Board Chair of Web Associates, Accsense, and Motion Engineering, as well as the Boards of Transoft Networks and EarthShell Corporation.



Karen Anne Platt, CPA

Chief Financial Officer

AppFolio, Inc.

Karen Anne Platt recently joined AppFolio, Inc. as chief financial officer.

AppFolio is a software development company in the start up phase focusing on delivering multiple applications for the small to medium sized business. She

leads the company's operations and oversees accounting, human resources, facilities, risk management and legal. Previously she was with Network Hardware Resale (NHR) where she led the development of financial systems and processes that are critical to the operational efficiency that enabled NHR to provide seamless service to a global customer base. Platt holds a bachelor's degree in business administration from the University of Southern California and a master's degree in business administration in finance from Golden State University.



David Prichard

Market President

Bank of America

David Prichard is a senior vice president and private client adviser who provides integrated financial advice to high-net-worth customers in Bank of America's Santa Barbara region, which covers all of Santa Barbara and San Luis Obispo counties.

He has been a part of Santa Barbara's private banking scene for 23 years. Ten of those years, he has worked for Bank of America. Prichard is also the Bank of America market president for Santa Barbara and Ventura counties. In that role, he represents the Bank of America Foundation in its philanthropic relationships with nonprofit organizations in the region.

Prichard holds a bachelor's degree in Business Economics and Cultural Anthropology from the University of California at Santa Barbara. He is a certified trust and financial adviser, holds a certificate in personal financial planning from the University of California at Los Angeles, and has a real estate license.

David and his wife, Cristina, have two children. Their daughter, Maria, is a freshman at University of Southern California; their son, Daniel, is a sophomore at Dos Pueblos High School.



Mike Rattray

Mike Rattray works in business administration for Smart Office Interiors, a local company. He holds a master's in business administration. He has volunteered for many community organizations, including the Goleta and Westside Boys & Girls Clubs and Camp Whittier. Rattray also serves on the boards of directors of Partners in Education and United Boys & Girls Clubs of Santa Barbara County. He lives in Goleta with his wife Judith.



John B. Romo

President

Santa Barbara City College

John Romo is the President of Santa Barbara City College. John's 22-year history at the college began in 1977 when he was hired to be an instructor in the Essential Skills Department and Director of the Reading/Study Skills Center. He became Dean of Instructional Services in 1983, and from 1986-1994 was Vice President for Academic Affairs. From 1994-1999 John served as Vice President for SBCC's Continuing Education Division, overseeing more than 400 instructors offering more than 2,000 courses and services to the community each year.

In 1999, John accepted the position of Chief Operating Officer of the Planned Parenthood Federation of America in New York City. Although he and his wife, Mary, planned to stay in New York for five years, they happily returned home early when John was given the opportunity to assume the presidency of Santa Barbara City College in August 2002.

During his 35 years in Santa Barbara, John has been actively involved in community service. He was chairman of the Santa Barbara Downtown/Waterfront Visioning process, and a member of the Santa Barbara Museum of Art Board, Santa Barbara County Schools Board of Education, the Foundation for Santa Barbara City College Board of Directors, the Santa Barbara Region Economic Community Project Leadership Group, the Santa Barbara Planned Parenthood Board of Directors, the Scholarship Foundation of Santa Barbara, and the Santa Barbara Area Chamber of Commerce Board of Directors

John has also been a member of the Hispanic Chamber of Commerce, the Hispanic Business Council of the Santa Barbara Chamber of Commerce and the Santa Barbara Hispanic Achievement Council Board of Directors. In 1999, he was named recipient of the annual Santa Barbara Hispanic Achievement Council Award for leadership and service to the community.

Among other awards John has received are the Latinos for Better Government Community Service Award, the Santa Barbara Hispanic Business Council Volunteer Service Award, and the Distinguished Community Service Award from the Anti-Defamation League and Santa Barbara B'nai B'rith Lodge.

John earned a Bachelor of Arts degree in German Literature from the University of Redlands. He received his Standard Lifetime Elementary Credential, Administrative Services Credential and M.A. in Educational Administration from UCSB. He also completed all course work and exams toward his Ph.D. in Educational Psychology.



**Gerry Rubey
Community Volunteer**

Gerry Rubey is currently a community volunteer and consultant specializing in local political campaign management. Prior to retirement, she had been General Manager and President of several large manufacturing corporations in the Santa Barbara area. Gerry received her B.A. from the University of California at Santa Barbara in Spanish.

Gerry is a proud wife, mother, and foster parent. The bulk of her time is spent as a volunteer case manager for Court Appointed Special Advocates in Ventura County. She has been a United Way volunteer since 1982 and is a former Board President. Gerry has participated in a variety of United Way committees including the Volunteer Review Cabinet and Community Impact Design Team. She has also played a major role in agency relations.



**Brian Sarvis
Superintendent
Santa Barbara City School Districts**

Brian Sarvis has been committed to public education for 29 years. He joined the Santa Barbara School Districts in 2001 and was selected to serve as superintendent in 2004, overseeing all operations, educational strategies, and strategic plans for 21 elementary and secondary schools, including 16,000-students and 1,800-employees.

Dr. Sarvis' broad experience includes service as assistant superintendents, principal, university instructor, school psychologist, and director of various divisions responsible for accountability, evaluation, technology, curriculum, staff training, and special education. He has a bachelor's degree in sociology, a master's degree in psychology, a doctorate in educational administration, and has completed post- doctoral study in technology.

Dr. Sarvis is a member of the Fighting Back Steering Committee, Partners in Education Executive Committee, Santa Barbara Rotary, UCSB Gevirtz Research Center Executive Committee, Santa Barbara Public Education Foundation, and UCSB research projects. A man of many interests, his free time is often spent trekking, climbing, biking, or traveling to distant lands with his wife, Ann, and their six grown children. As someone who has seen firsthand the positive impact of United Way's programs for youth, Dr. Sarvis is committed to the organization's mission. He is pleased to be part of United Way's CEO Club



Rick Scott

Rick Scott is the president of the Cancer Center of Santa Barbara. Previously, Scott has also served as the center's chief financial officer and executive director.

His past experience includes serving as the director of finance at Santa Barbara Cottage Hospital and other various positions as a Certified Public Accountant. He earned a bachelor's degree in business economics from the University of California at Santa Barbara and has studied counseling psychology.



Patrick Steele
Managing Director
First Republic Investment Management

Patrick is a Managing Director at First Republic Investment Management. Previously he was Executive Vice President - Marketing and Director of Starbuck, Tisdale & Associates, a former subsidiary of First Republic Bank. He formerly managed the pension department at Santa Barbara Bank & Trust and prior to that he was a Senior Administrator and Director of Marketing for American Trust Company of Hawaii, Inc. He has a B.A. Degree from University of Southern California and is responsible for marketing/business development and client contact.



William S. Thomas, Jr.
Chair
Community Relations Executive
Santa Barbara Bank & Trust

Tom Thomas retired as President and Chief Executive Officer of Pacific Capital Bancorp and Santa Barbara Bank & Trust in April 2007. Tom is now working as Community Relations Executive for the Bank with responsibility for establishing the Company's Charitable Foundation. He joined Santa Barbara Bank & Trust in 1994 as Manager of the Trust & Investment Services Division. He was named President and Chief Operating Officer of Santa Barbara Bank & Trust in 1996 and President and CEO of Pacific Capital Bancorp and Santa Barbara Bank & Trust in April 2000.

Tom has been active with United Way since 1996 and was Campaign Chair in 2000-2001. He has served on the United Way Board since 2001 and is currently the Board President. In addition, he has served on the Boards of C.A.L.M, The Santa Barbara Symphony, Santa Barbara Chamber of Commerce and the Santa Barbara Museum of Art. He is currently on the boards of Partners in Education and the Courthouse Legacy Foundation, a trustee of the UCSB Foundation and the Montecito Community Foundation and a member of the Westmont College Board of Advisors.



Ron Werft
President & CEO
Cottage Health System

Ron Werft has headed the region's largest nonprofit organization, Cottage Health System, since January 2000. He previously served 13 years as its chief operating officer. Before that, he was associate director of the University of Minnesota Hospital.

At Cottage, which employs more than 2,300 people, Werft oversees the system's three facilities, including the flagship Santa Barbara Cottage Hospital and the

associated Cottage Children's Hospital, Goleta Valley Cottage Hospital, and Santa Ynez Valley Cottage Hospital. Ron is a graduate of the University of California at San Diego, and he holds a master's degree in hospital and healthcare administration from the University of Minnesota.



John Wigle
Chairman & CEO
AGIA Insurance Services

John began his insurance career in 1971 when he went to work for National Ben Franklin Life Insurance Company in Chicago, Illinois. In 1973, John joined AGIA in Chicago as Director of Sales and, in 1976, relocated to Santa Barbara as VP of Marketing. Today, John is Chairman and CEO of AGIA which has grown from 25 associates to 300+ with offices in Carpinteria, Chicago, Des Moines, Minneapolis, Scottsdale and Washington DC. AGIA offers life, health and accident insurance plans on a private label, turn-key basis through Affinity Relationships and serves as a full service Third Party Administrator. Clients include national financial institutions, membership groups and unions.

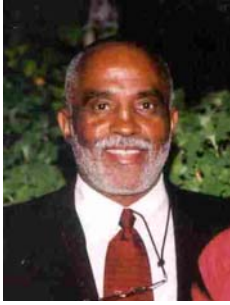
John is a member of the following professional and service organizations: California Association of Life Underwriters, National Association of Health Underwriters, National Association of Life Underwriters, AIPAGIA, Charter Member and past Board Member of the Professional Insurance Mass-Marketing Associates (PIMA). On the local front, John received the Paul Harris Fellow Award from Rotary International and was named Entrepreneur of the year by the Carpinteria Chamber of Commerce. He is a past Chairman of Cub Scouts Pack 50, and a member of the Santa Barbara Chamber of Commerce and the Carpinteria Valley Chamber of Commerce. Additionally, John has played an integral part in the local chapter of the Young President's Organization (YPO), has chaired the men's Forum, and was Chairman of the Santa Barbara Chapter of the World Presidents' Organization (WPO).

Of special interest to John, was a program he founded and chaired in 1993 known as C.O.P.E.; Community Operating in Partnership to Empower. John founded this program to prevent unwanted homelessness in Santa Barbara County, and to help those on the brink to become self-sufficient. In doing so, 4 Santa Barbara non-profits worked in collaboration; Shelter Services for Woman, Catholic Charities, Storyteller Preschool, and Transition House. During its 4 years, COPE raised in excess of \$250,000 to help prevent homelessness in the Santa Barbara community.



James A. Wolfe

Jim Wolfe retired as President/CEO of Balance Bar/Kraft in Carpinteria. Previously, he was President of Wolfe Marketing in Santa Barbara and has held executive positions in marketing at Welch's, 7-Up Foods, and Coca Cola. He earned a degree in business administration from the University of Buffalo and did graduate work at New York University. Wolfe serves on the board of Hillside House and chairs the Advisory Board. He volunteers as a mentor for the Fighting Back youth mentor program. He is also actively involved as a counselor for SCORE, providing free business counseling for existing and startup businesses.



Michael D. Young, Ph.D
Vice Chancellor-Student Affairs
University of California Santa Barbara

Michael Young has been Vice Chancellor for Student Affairs at UC Santa Barbara since January 1990. Vice Chancellor Young oversees all the departments in the Division of Student Affairs, some of which include Admissions, Financial Aid, Office of the Registrar, Women's Center, Recreation, the Educational Opportunity Program, Arts & Lectures, the MultiCultural Center, Student Health, Counseling & Career Services, and the Office of Student Life. In addition, he serves as the institutional control point for issues pertaining to Isla Vista and child care. Under his leadership, the University opened a Community Services Center in Isla Vista, renovated the Orfalea Family Children's Center, and constructed the Recreation Center and the Student Affairs/Administrative Services Building (SAASB). Student Affairs is currently involved in the design, development, and construction of a Recreation Center Expansion and a Student Resource Building (SRB).

In 1997 Dr. Young was elected to the National Vice Presidents Group, an organization of highly respected vice presidents for student affairs from across the United States. He is also a member and has served as chair of the UC Systemwide Vice Chancellors for Student Affairs in addition to serving as co-chair of the UC Admissions Processing Task Force. Over the years, he has served on many other campus and systemwide committees, including the advisory group for UCSB's Center for Black Studies.

Prior to coming to UCSB, Vice Chancellor Young served for eleven years as the Associate Dean of the College and University Registrar at Wesleyan University in Middletown, Connecticut. At Wesleyan he was responsible for implementing undergraduate education policies and for guiding all programs related to registration, matriculation, and student information systems. He also served for eight years as a member of the Middletown Board of Education.

Dr. Young has taken an active role in community affairs during his years in Santa Barbara; he is a member on the Santa Barbara Public Education Fund's Board of Directors; Goleta Valley Community Hospital's Board of Directors and Executive Committee; the Board of Directors and the Personnel Committee of the Family Service Agency of Santa Barbara, and the Steering Committee of the Santa Barbara Fighting Back Task Force. In 1994, he assumed the role of Senior Campaign Chair for UC Santa Barbara's United Way Campaign. The next year, he was appointed to the Chairman's Council of the Campaign Cabinet for the United Way of Santa Barbara County's 1995-96 Annual Campaign. More recently, he assumed the General Campaign Chairship for the County's 1997-98 Annual United Way Campaign, and Chair of the County's Day of Caring Committee for 1998-99, 1999-2000, and 2000-2001. He has been a member of the Board of Directors for the United Way of Santa Barbara County since 1997.

Vice Chancellor Young received his Ph.D. in Higher Education Administration from the University of Iowa, his M.A. in history from the University of Michigan (Ann Arbor), and his B.A. in history from Beloit College in Wisconsin. Michael also served a term on the Beloit College Board of Trustees.

United Way of Santa Barbara County Volunteer Committees:

- Audit Committee
- Campaign Cabinet
- Career Day Mentors
- Community Campaign Chair
- Community Campaign Cabinet

Community Design Team
Finance Committee
Endowment Committee
Leadership Committee
AdT Committee
Day of Caring
Investment Committee
Management Committee
Volunteer Review of Community Investments
Workplace Campaign
Red Feather Ball

United Way of Santa Barbara County Staff

The United Way staff is a group of talented, educated, diverse, committed, dedicated and qualified individuals who work as a team to have a powerful impact on the lives of people in the community. They are aware of the importance of having the responsibility of stewardship of community dollars and are extremely respectful of the role they play in putting those dollars to the best use. Below are staff bios:

G. Paul Didier, CFP, MBA President and CEO

Paul Didier has been President and CEO of United Way of Santa Barbara County since 1978. A Certified Financial Planner, MBA holder, and a former real estate broker and syndicate with his own firm, he has applied for-profit, market driven innovations to United Way and other non-profit organizations. He has been a presenter to local and national United Way and non-United Way conferences on fund raising, marketing, direct mail, leadership giving, planned giving, and computerized information systems. He has consulted with other local United Way organizations as well as hospitals, universities, environmental groups and other types of social service agencies.

His United Way accomplishments include: fifteen years of successful endowment programs, over ten years of direct mail, key designer on six different fund raising software systems (currently working on a seventh), successful capital campaigns for headquarters & flood disaster, performance related evaluation systems, innovative multi-agency, public/private service projects, market & community driven fund distribution systems and low cost donor involvement programs.

Susan Baker Community Impact Manager

Susan Baker, the newest member of the United Way of Santa Barbara County team, joined the Community Impact Department in March 2008. She will be assisting with resource development, fund distribution, and program design and implementation for identified UWSBC Initiatives.

Born and raised in Southern California, Susan comes to us with over 15 years experience in non-profit management. She has worked with Tres Condados Girl Scout Council, Camp Fire USA, and for the past 5 years was the Director of Youth Services for Interface Children and Family Services.

Robert P. Blessing
Database Coordinator

Robert Blessing has been the Database Coordinator at United Way of Santa Barbara County since 2004. He is the lead staff person in managing the internal relational database, generating operational reports and coordinating the direct mail program.

Bobby is a native of Santa Barbara and attended school here locally. He previously worked for Cox Communications in Santa Barbara as an analyst for three years before coming to United Way of Santa Barbara County. He has a degree in Computer Information Systems from Santa Barbara City College and many certificates in Information Technology. He runs a local Boy Scout Troop and also is an active member of the Goleta Lions Club.

Leo R. Bopp
Financial Services Coordinator

Leo joined the United Way of Santa Barbara County in July 2002. He works in the Finance Department, where he handles all the pledge card processing, accounts payable, accounts receivable, and is the Local Board Contact for the Emergency Food and Shelter Program.

Born in Pennsylvania but moved to southern California at the age of 5. Before joining United Way of Santa Barbara County, Leo worked in the retail business as a District Manager and as an auditor. Leo also believes it is also important to give back to the community, he coached little league for over 10 years and is active with the Goleta Lions Club having served as President.

Jen Bowman
Assistant to the Community Impact Department

Jen Bowman joined the United Way of Santa Barbara County in 2007. She currently works in the Community Impact Department, where she is the CTK administrator (CTK is an agency grant reporting software and database), assists the Director for Community Impact and the Special Projects Director, and completes various research assignments.

She is a native Santa Barbaran graduating from the University of California at Santa Barbara with a Bachelor's Degree in Women's Studies in 2005. Jen recently completed all coursework required for her Certificate in Nonprofit Management through the University of Illinois at Chicago's External/Online Education Program. Prior to joining the United Way, Jen spent six years working in the financial industry, before deciding she wanted to go into the nonprofit field.

Charles Caldwell, M.A.
Director of Special Projects/*Power of Partnership Initiative*

Charles Caldwell serves as Special Projects Director for United Way of Santa Barbara County. Since 1999, his responsibilities at United Way have included workplace and corporate fundraising, volunteer management, directing the fund distribution system, directing the *Power of Partnership Initiative*, program design and management, developing measurable outcomes, agency relations, marketing, building partnerships, grant writing, strategic planning, and business planning.

Charles is a native Californian, but has lived in several Western States, the Midwest, the East Coast, and in the South. He also lived in Paris for a couple years where he worked as a marketing consultant for the New York Times. He returned to California and moved to Santa Barbara, where he became one of the managers of the Earthling Bookshop before joining United Way. In 2005, Charles completed his Masters degree in Mythological Studies from Pacifica Graduate Institute.

Jeanette Delgado**Front Office Coordinator/Executive Assistant**

Jeanette Delgado serves as the Front Office Coordinator and Executive Assistant for United Way of Santa Barbara County. Over the past several months, her responsibilities during the day at United Way have included greeting and directing all visitors of United Way of Santa Barbara County, managing the telephone system, answering general questions regarding United Way of Santa Barbara County, directing individuals in need of assistance to the proper source of help and maintaining inventory of office supplies. In the afternoons she assists the CEO, Paul Didier, with his scheduling, setting up meetings, article distributions among staff, organizing Board of Directors meetings, and other day to day duties.

Jeanette is originally from Los Angeles, having moved here in the fall of 2003. While living in Santa Barbara, she earned a Bachelors Degree in Film Studies and Spanish from the University of California Santa Barbara. Jeanette's past work experiences have included working for Arts and Lectures and being a peer advisor for the Spanish Department at UCSB up until her graduation in 2007.

Joel Dinan**Senior Campaign Executive**

Joel Dinan serves as a Senior Campaign Executive for United Way of Santa Barbara County. Over the past year, his responsibilities at United Way have included workplace and corporate fundraising, agency relations, and volunteer management.

Joel is originally from Massachusetts, having moved here in the spring of 2006. While in Massachusetts, he earned an Associates Degree in Business from Northern Essex Community College before receiving a Bachelor's Degree in Marketing from the University of Massachusetts at Amherst in the Spring of 2003. Joel worked for a large window company from the time he graduated from college until he relocated to Santa Barbara.

Sara Driskell**Leadership Services/Red Feather Ball Assistant**

Sara Driskell recently joined the United Way of Santa Barbara County's Leadership Team as the Leadership Services/Red Feather Ball Assistant. Sara was raised in Richmond, Virginia and earned a Bachelors of Arts in Psychology and Studies of Women and Gender from the University of Virginia. Sara is passionate about helping her community and is excited to join the team in Santa Barbara.

Kaniesia Evenson, M.A.Ed**Assets for Youth Coordinator**

Kaniesia Evenson joins the United Way of Santa Barbara County, Community Impact Team, in the position of Assets for Youth Coordinator. Kaniesia was born and raised in Central California, before attending Humboldt State University and earning Bachelors of Science degrees in Marine Biology, Zoology and Life Science. Her passion for informal educational environments led her to live and work in Arizona, Alaska, New England and currently Santa Barbara. Her higher education experience includes a Certificate in Museum Studies from Harvard, and a Master's in Secondary Education from the University of Phoenix, and CA & AZ teaching certifications.

Through 12 years of educational experience, Mrs. Evenson maintains a strong belief that all children should be exposed to classroom, outdoor, hands-on, and real-life learning experiences, to best determine their paths of interests and future pursuits of happiness.

Ina Frank, M.A.**Leadership Services Representative**

Ina Frank joined the United Way of Santa Barbara County as the Leadership Services Representative in April 2008. Ina has extensive development, major gifts, and planned giving experience, as well as six years working with the United Ways of Ventura County and Greater Los Angeles. Ina was the Founding Executive Director of the Santa Barbara Jewish Federation and has led programs in individual philanthropy for the American Heart Association – Western States Affiliate, and March of Dimes – Southern California Chapter.

She serves on the Board for the National Women's Political Caucus and was the National Vice President and Development Chair for the Antioch College Alumni Association. Ina received a Master of Arts in Organizational Management from Antioch University in Santa Barbara.

Judy Goodbody, CFRE, RIA, CRTP**Gift Planning Services Officer**

Judy began her career with United Way of Santa Barbara County on January 24, 2000. As Gift Planning Services Officer, her responsibilities include oversight of United Way's Endowment and Gift Planning programs, and assisting donors and their professional advisors with complex charitable giving vehicles as part of their overall estate planning.

With the aid of a volunteer team of premier estate planning professionals, Judy's department advises donors on the use of Charitable Remainder Trusts, Gift Annuities, Pooled Income Funds, Life Insurance, Living Trust Provisions, and Wills. She also facilitates gifts of appreciated assets such as stocks, bonds, real estate, gifts of IRA's, and other retirement plans. Judy's team develops plans for United Way donors to achieve their charitable and financial planning goals.

Judy is a Registered Investment Principal and a licensed tax consultant. She was the investment advisor for two credit unions prior to joining the staff at United Way. Judy has a strong background in sales and marketing having worked as an Account Manager for Procter & Gamble, the Sales Manager for Core Mark Distributors, and as a Registered Representative with MetLife Resources.

Judy is the Executive Director for HELP of Carpinteria, and serves as President of the Planned Giving Roundtable of Santa Barbara. She was named one of 2007's Top 50 Women in Business by the Pacific Coast Business Times. Judy volunteers at her church and for several nonprofit organizations throughout the community, and was recognized by the Arthritis Foundation with the 2006 Angel Award. She attended Parkland College in Champaign, IL, and in 2004 she was awarded the Certified Fundraising Executive credential. Judy was born and raised in San Diego, CA, and moved to Carpinteria in 1976 where she enjoys golf, the theater, and our remarkable environment.

Courtney Jue**Community Campaign Assistant**

Courtney serves as a Community Campaign Assistant for United Way of Santa Barbara County. Her responsibilities at United Way started out in workplace and corporate fundraising, and have since switched to planning and organizing campaign events and managing newsletters and media for the sales team.

Courtney has moved quite a bit, originally from Arizona, her family then moved on to Washington, Southern California, New Jersey and finally Santa Barbara where she attended Westmont College.

She earned her Bachelor of Arts Degree in English Literature in May of 2007, right before taking on her job here at UWSBC.

Karen Knight

Leadership Services Representative & Red Feather Ball Coordinator

Karen started at United Way in July 1993 and guided the ADT and Leadership Circle Programs until 2003. She returned to United Way of Santa Barbara County after a four year hiatus upon moving to the Temecula area and is now part-time, working virtually with regular monthly week long trips up to Santa Barbara. Her primary function is point staff person for the Red Feather Ball in addition to reestablishing existing strategic relationships with Leadership and de Tocqueville donors.

Karen's business background includes 19+ years of quality achievement in business development, fundraising, marketing, and event planning for profit and non-profit organizations. She has an impressive track record of: customer service skills, organizational skills, relationship building, and development of marketing materials.

While at United Way for almost ten years, she has been responsible for growing the Leadership Homegivers and de Tocqueville programs from \$200,000 in 1992 to \$675,000 in 2002. Karen was also responsible for launching and orchestrating the Red Feather Ball, increasing revenues from \$60,000 in 1997 to \$230,000 in 2002. The revenue and marketing video from this event enabled us to raise additional revenue to support the growth of Fun in the Sun.

Julie Lank

Campaign Executive

Julie Lank is a new Campaign Executive at United Way of Santa Barbara County. Previously, she worked as a fundraiser at United Way of King County in Seattle, WA, and in development/public relations for Ronald McDonald House in Salt Lake City, UT. She has bachelor's degrees in Mass Communication and Psychology from the University of Utah and Brigham Young University respectively. For several years, she also ran her own successful small business in Seattle. Prior to that, she worked as a salesperson for Nestle and Nordstrom.

Terry Miller, M.A.

Director for Community Impact

Terry is the new Director for Community Impact at UWSBC, after having served the past 14 years as the Vice-President and Chief Program Officer of Interface Children Family Services, the largest non-profit organization of its kind in the tri-counties area.

Since her entry into the field of non-profit management 37 years ago, Terry has overseen a wide variety of family support programs in the areas of juvenile delinquency, youth mentoring, family literacy, foster care, child abuse and neglect, youth and family crisis, mental health and domestic violence. Terry is a strong supporter of public/private partnerships and community collaboration. She is the proud single mom of two adopted children in a wonderful multi-cultural family.

Ruth E. Mudge

Volunteer Systems Coordinator

Ruth E. joined the United Way of Santa Barbara County in November 2007 as the Volunteer Systems Coordinator. Ruth E. brings 21 years of experience in personnel support and information systems management to this position.

She retired as a Lieutenant Commander from the United States Navy in 2006. During her last tour she served as Administrative Director for Naval Reserves Commander Naval Forces Korea Headquarters. Previously she had worked as the Administrative Department Head at Naval Communications Area Master Station Mediterranean, Naples, Italy, and Assistant Officer in Charge, Personnel Support Detachment, London, England. She holds a MS in Information Systems Management from the University of Southern California.

Jerold W. Newton

Director for Financial Services

Jerry Newton has been the Director for Financial Services of United Way of Santa Barbara County since 1994. A native of Santa Barbara, he has nearly 40 years of experience in the finance/accounting field. Jerry started as an auditor/tax preparer for a local CPA firm in the 1960's and became the finance director of the local television station for nearly fifteen years (1971-1985). He managed his own accounting practice in Phoenix, Arizona for nine years before coming back to the Santa Barbara area in 1994 when he accepted the finance director position at United Way of Santa Barbara County.

His United Way accomplishments include: Successful annual audits by three different audit firms over the past ten years. Jerry is in charge of all financial reporting, journals, ledgers, financial statements, analytical reports, etc.

Steve Ortiz

Director of Workplace Development

Steve Ortiz is the Director of Workplace Development for United Way of Santa Barbara County. Since 2005 his responsibilities at United Way have included workplace and corporate fundraising, volunteer management, agency relations, event planning, strategic planning, and marketing.

Before joining United Way, Steve was a Financial Manager (Contract Negotiations and Purchasing) for a local organization. He has also served as a loan consultant and financial advisor in Los Angeles. In 2004, Steve completed three Bachelor Degrees at the University of California Santa Barbara: Business/Economics, Global Studies with an emphasis in Economics and Politics, and Spanish.

Recent accomplishments include UCSB's seventh Annual Business Plan (First Prize Award for Excellence in Business Writing). Specialty Merchandise Corporation and the University of California Writing Program sponsored the award.

Penny Rowan

Assistant to Gift Planning Services

Penelope Rowan serves as the Gift Planning Services Assistant for United Way of Santa Barbara County. Penelope started work at United Way in 1996 in the Leadership Department and after leaving United Way for a year she returned to work in Gift Planning.

Penelope is originally from England and spent some time studying French at the Sorbonne in Paris. She worked for several years for a large Mutual Fund company in Los Angeles.

Jessica Stampe

Assistant to the *Power of Partnership Initiative*

Jessica is a Santa Barbara native and joined United Way of Santa Barbara County in November of 2007. Before beginning her position at UWSBC, Jessica worked in both event promotions and planning and as a contractor in the editorial department for a medical marketing firm in San Diego.

She holds a Bachelor's degree in Psychology from the University of California, San Diego where she was involved in behavioral research.

IV. Resource Development

Annual Giving

In addition to special projects, county-wide initiatives, and capital needs, United Way and all of its partners require support every day. This type of on-going, long-term support is called Annual Giving. Annual Giving is the lifeblood of any charitable organization, without which charities would cease to exist.

United Way's Annual Campaign is focused on uniting various business sectors and individuals that have identified themselves to be open to fundraising, sponsorships, and event sponsorships. In addition to various local businesses, entrepreneurs, retirees, and others participate in the annual community, building support from their home. Annual Giving can be done via cash, check, payroll deduction, debit card, credit card, stocks, auto donations, real estate, and other forms of value. The purpose of Annual Giving is to provide the revenues to conduct operations which range from paying for utilities, transportation, maintenance of facilities, salaries and a variety of other daily operational expenses for ourselves and our partners.

Leadership Giving

United Way continues to be supported by very generous people in our community. Through the *Power of Partnership*[™], members of the Tocqueville Society and Leadership Circle ensure children, families, and seniors receive services that are helping them develop a hopeful future.

Key Leadership Giving Facts

- \$1.2 million of our annual fundraising comes from approximately 500 Tocqueville Society and Leadership Circle donors – this represents more than 1/3 of our total Annual Campaign.
- Of the 500, nearly 375 are Community All Stars who have given \$500 or more to United Way of Santa Barbara County continually for 3+ years.
- There are 273 donors (74%) who give 100% of their annual gift to our resources under management which are distributed after careful consideration by volunteer committees.
- Over the past 5 years, Leadership Circle membership has grown by more than 150 donors.

Leadership Circle Giving Levels

Gold Circle:

Annual gift of \$6,000 - \$9,999

Silver Circle:

Annual gift of \$3,000 - \$5,999

Bronze Circle:

Annual gift of \$1,200 - \$2,999

Tocqueville Society of Santa Barbara County

Tocqueville Society recognizes individuals who contribute \$10,000 to \$1 million and beyond. The name of the Society was chosen because of Alexis de Tocqueville's admiration for the American spirit of voluntary association and voluntary effort for the community good. It was founded 30 years ago by United Way of America (our trade association) to recognize outstanding philanthropists across

the United States.

Many opportunities are open to you as you recognize community needs and consider your charitable intentions. As your annual charitable giving level approaches the \$10,000 level, membership in the Tocqueville Society offers you the options and flexibility you need to expand your philanthropic influence in our community.

- The convenience of writing one check, making payments or payroll deductions to United Way to cover all your annual charitable giving.
- The flexibility of establishing a Personal Giving Account.
- The opportunity to set an example for national and local philanthropic leadership.
- The ability to contribute to organizations anonymously through United Way.
- The opportunity to gather with other like-minded individuals from Santa Barbara County and across the nation for social events and informational seminars.
- The power to produce local community solutions that meet existing and emerging Santa Barbara County needs.

Grant Seeking

United Way also seeks grants from a variety of different public and private sources. Within the last two years, United Way has more than doubled the amount of grants received from local foundations. These grants are made to a variety of United Way partnership projects and initiatives. United Way is currently in the process of expanding its grant seeking to regional and national private foundations as well as city, county, state, and national government sources.

Home Based Giving

United Way of Santa Barbara County offers a variety of ways to become involved and support our unique community building efforts. In addition to corporate gifts, foundation grants, employee giving, and gifts of stocks and options, there are a variety of ways that home based business people and retired individuals can become involved in supporting our work.

For example, individuals can give through the mail by check, credit card, debit card, stocks, options, automobiles, art, jewelry, real estate, etc. Our direct mail program consists of periodic letters, invitations and reports to selected audiences. Home based giving is not just about monetary donations; we very much value your contributions of time and ideas.

United Way's Long Term Financial Sustainability

Endowment Fund

United Way's endowment creates a stable foundation to ensure the long-range financial health of our organization and the human services provided to the people of our community. In 1982 United Way of Santa Barbara County established the policies for our **General Endowment Fund** to provide resources to respond quickly to challenging conditions in our community. Since then we have added five additional endowment funds for the purpose of dedicating perpetual dollars toward the long-term needs of the organization and the focus areas that you, our donors and volunteers have told us are important to Santa Barbara. Those endowment funds are:

Building Endowment Fund keeps our Gutierrez Street home in good repair; assisting with maintenance and large capital needs that arise.

STAR Staff Endowment Fund addresses the need to attract, develop and retain talented staff. **Customized Family Fund** allows individuals to earmark their charitable investments for specific projects, charitable goals, and areas of concern.

Children's Services Endowment Fund focuses on the needs of children, as they are the highest priority for those who give to United Way of Santa Barbara County.

Fun in the Sun Endowment Fund insures the on-going funding for United Way's summer enrichment collaboration which addresses the complex social and academic issues faced by local at-risk children.

The Heritage Club

The Heritage Club was founded in 1982 to honor those forward-thinking individuals who have shown their long-term commitment to the community by leaving their legacy to United Way Santa Barbara County. These philanthropic friends share an important vision – their commitment to the wellbeing of this community and the people who live here. They also share a profound understanding of the powerful impact such a commitment has on our community, not only today, but for generations to come.

Their gifts come in the form of Charitable Remainder Trusts, Gift Annuities, Pooled Income Funds, Philanthropic Funds, Life Insurance and Bequests. Through these thoughtful estate plans, their endowment provides a solid foundation of perpetual support for United Way of Santa Barbara County and the human services needs of our community.

That is why the Heritage Club recognizes those who make planned gifts on the Wall of Honor, which is a permanent plaque located in the Stuart Taylor Main Conference Room, and in the Annual Thank You Report. Each year United Way honors our Heritage Club members at the Annual Heritage Club Appreciation Luncheon, which is hosted by one of Santa Barbara's exclusive restaurants and sponsored by a local business. Of course, those who prefer anonymity in their philanthropy are completely respected with strict confidentiality, and are listed as Anonymous Donors in all our materials.

The nation's tax laws provide incentives that encourage philanthropy, because of the unique role that charitable organizations play in meeting the important needs of society. There are many benefits that charitable financial planning can offer in structuring a gift.

V. Events

Campaign Reception – A thank you reception for the Campaign Cabinet & Board members.

Day of Caring – The largest volunteer day in the tri-counties. It also kicks off the Annual Campaign on the third Saturday in September.

Red Feather Ball – A silent and live auction that underwrites the Fun in the Sun program on the second Saturday in October.

Annual Awards Celebration – Honoring volunteers and supporters of the campaign season on the second Wednesday in May.

Executive Club Luncheon – Honoring Executive Club members.

Heritage Club Luncheon – honoring those who have named United Way in their estate plan on the first Wednesday in June

Tocqueville Society and Leadership Circle Reception – Celebrating all donors who give \$1,200 and up.

Tocqueville Society Celebration of Philanthropy – A dinner celebrating donors who give \$10,000 and up to United Way.

Holiday Bash – A holiday reception to update donors about the Annual Campaign on the first Wednesday in December.

Pacesetter Luncheon – A lunch for pacesetter campaigns to join and strategize ways of being more successful for the upcoming campaign year.

Red Feather Ball VIP Reception – A special reception for key United Way donors

Leadership from Home Campaign Kick Off – a reception to kick off the annual leadership drive.

VI. Volunteers

Volunteer Opportunities with United Way of Santa Barbara County

United Way of Santa Barbara County has a wide range of volunteer opportunities for individuals, groups, agencies, and corporations. As a volunteer-led organization, United Way depends on the commitment of volunteers to help raise awareness around our mission.

United Way of Santa Barbara County has a wide variety of volunteer opportunities. Listed below are some of our opportunities:

- Career Day Mentors
- Campaign Cabinet
- Day of Caring
- Fundraising
- Fun in the Sun
- HomePlay Learning Kits
- Individualized Placement
- Lunch Bunch
- Community Leadership Initiative
- Board of Directors
- Office Assistance

Volunteer Santa Barbara County!TM (www.volunteersbc.org)

United Way's Board of Directors made a commitment to investing with partners and advanced technology to allow for expansive volunteer opportunities across the Santa Barbara County landscape. This new initiative, Volunteer Santa Barbara County!TM, is available to all employees, retirees, students, and local charities throughout Santa Barbara County to provide opportunities through listing, linking, reporting, tracking, and training. This new partnership already includes the Non-Profit Support Center of Santa Barbara County and First 5 Children and Families Commission of Santa Barbara County.

VII. Unique Value to the Community:

Power of Community Partnership and Facilitation

Each year the United Way of Santa Barbara County surveys our donors to determine the areas of need that are most important to address. Consistently, the results of these surveys tell us that we must focus our efforts on children, families and seniors. United Way's inherent position as a community leader by virtue of our fundraising and grant making process gives us the ability to assess the services made available by individual non-profit organizations, as well as the gaps in needed services. By convening expert forums from our three focus areas to determine the needs of the community, it became clear that United Way is in the unique position to step into a more profound leadership role in creating partnerships among the already existing service providers. Through the *Power of*

Partnership[™], United Way brings together local health and human service leaders, schools, local funders, and a variety of community leaders and stakeholders with an aspirational and achievable vision for the people of Santa Barbara County.

Partnership Initiatives and Collaborations – Listing

Successful Children & Youth, Strong Families, Independent Seniors and Better Communities

Fun in the Sun – Santa Barbara and Goleta

Fun in the Sun – Carpinteria

Assets for Youth Initiative

Character Counts! Character development in schools

First 5 of Santa Barbara County: Early Childhood Projects

Californians for Healthy Kids

Born Learning

Pre-Kindergarten Institutes

Home Play Learning Kits

Home Instruction for Parents of Pre-school Youngsters

Welcome Every Baby

Healthy Kids Santa Barbara County

‘Jeopardy’ Learning Games and Devices for Schools

MERIT Program – Music Education Reinforces Intellect and Talent

Project Learn/A-OK: After school tutoring

Affordable Housing

Prescription Drug Discount Program

Community Just Cause Assistance Program

Family Senior Caregiver Respite Program

Senior Caregiver Coalition of Santa Barbara County

Power of Partnership Initiative

211: 24 hour information and referral

VolunteerSBC!

Day of Caring

Online Resource/Service Directories – Countywide

United Way Partnership Initiatives - Overview and Detail

This overview is divided into the following 4 sections, with a more detailed section on our Partnership Initiatives at the end:

1. Successful Children and Youth

2. Strong Families

3. Independent Seniors

4. Better Communities

1. Successful Children and Youth

Fun in the Sun - Santa Barbara and Goleta:

Fun in the Sun is a safe, nurturing summer education and enrichment program for 300+ local disadvantaged children taking place annually. It focuses on positive character development, scholastic improvement, and parental involvement.

Partners include: Assistance League of Santa Barbara, Girls Inc. of Greater Santa Barbara, Family Service Agency Santa Barbara, Cancer Center of Santa Barbara, City of Santa Barbara Parks & Recreation, Clinics on Wheels, Community Action Committee, Community Environmental Council, Cornelia Moore Dental Foundation, Dancing Drum, Santa Barbara Botanic Gardens, Santa Barbara

Jazz Dance Academy at Arts Alive!, Santa Barbara Neighborhood Clinics, Santa Barbara Public Library, Santa Barbara School District, Santa Barbara Tennis Patrons, and United Way of Santa Barbara County.

Fun in the Sun – Carpinteria:

The same life-changing program as is taking place in Santa Barbara and Goleta.

Partners include: Girls Inc. of Carpinteria, Boys & Girls Club of Carpinteria, Carpinteria School District, and most of the Santa Barbara and Goleta partners (see above).

Building Strengths in Young People Initiative:

Long-term program focused on increasing the number of “assets” for Santa Barbara County teens. “Assets” are 40 key traits identified by the Search Institute of Minnesota that help teens transition into successful adulthood.

Partners include: Council on Alcoholism & Drug Abuse, Dos Pueblos High School, La Cumbre Junior High School, Goleta Valley Jr. High, Santa Barbara County Education Office, Santa Barbara High School District, and United Way of Santa Barbara County.

Character Counts!:

This program is currently in place in twenty-four Santa Barbara County elementary schools, providing curriculum, assemblies, and incentives for improving student behavior through the six pillars of character: trustworthiness, respect, responsibility, fairness, caring, and citizenship.

Partners include: Boys & Girls Club of Santa Barbara, Rotary Club of Santa Barbara, School Districts (Carpinteria, Goleta, Santa Barbara, and Santa Ynez), and United Way of Santa Barbara County.

First 5 of Santa Barbara County: Early Childhood Projects

Community Grant Fund Collaboration matches United Way dollars with state dollars for 12 county-wide early education projects as well as health insurance for toddlers who are without. United Way volunteers serve on County Commissions and County Representatives serve on United Way committees, improving the effectiveness and efficiency of public and private dollars.

Partners include: 39 early childhood partners, First 5 of Santa Barbara County, and United Way of Santa Barbara County.

Californians for Healthy Kids:

This collaboration of twenty-five United Way organizations throughout California works to create statewide models of health insurance for children who have no health insurance of any kind.

Partners include: The California Endowment, numerous elected officials, Santa Barbara Chamber of Commerce, and a consortium of twenty-five United Way organizations across California including the United Way of Santa Barbara County.

Success by 6: Born Learning

Public education/engagement campaign helping parents, caregivers, pediatricians, clinics, and communities create early learning opportunities for young children.

Partners include: First 5 of Santa Barbara County, local pediatricians, Sansum Clinic, Santa Barbara Health Department, Santa Barbara Neighborhood Clinics, and United Way of Santa Barbara County.

Pre-Kindergarten Institutes:

Special summer classes for low-income 5 year-olds to prepare them academically, socially, and

behaviorally to succeed in kindergarten.

Partners include: First 5 of Santa Barbara County, Goleta Union School District, Santa Barbara School District, Healthy Start, Isla Vista Youth Projects, and United Way of Santa Barbara County.

Home Play Learning Kits:

Provides bilingual home based games to train and stimulate parents and children to prepare for them school.

Partners include: First 5 of Santa Barbara County, Healthy Start, Isla Vista Youth Projects, Santa Barbara School Districts, and United Way of Santa Barbara County.

HIPPY (Home Instruction for Parents of Pre-school Youngsters):

Provides in-home parent education for low income families.

Partners include: Healthy Start, Santa Barbara School District, and United Way of Santa Barbara County.

Healthy Kids Santa Barbara County:

Collaboration to provide health insurance for 4,000 low income Santa Barbara County children who have no health insurance of any kind.

Partners include: Cottage Health System, County of Santa Barbara Health Department, County of Santa Barbara Social Services, First 5 of Santa Barbara County, Neighborhood Clinics, Santa Barbara Regional Health Authority, and United Way of Santa Barbara County.

‘Jeopardy’ Learning Games and Devices for Schools:

‘Jeopardy-like’ electronic learning devices designed and constructed by United Way volunteers to stimulate classroom learning.

Partners include: Dos Pueblos High School, La Cumbre Junior High School, Santa Barbara County Education Office, Santa Barbara School District and United Way of Santa Barbara County.

MERIT Program (Music Education Reinforces Intellect and Talent):

An intensive summer program of classical music education and performance for Santa Barbara County teens.

Partners include: Music Academy of the West, Music Association of Santa Barbara Schools, Santa Barbara Youth Symphony, selected music teachers, and United Way of Santa Barbara County.

Project Learn/A-OK:

After-school tutoring and homework assistance for low-income children.

Partners include: Girls Inc. of Greater Santa Barbara, Hollister Elementary School, Santa Barbara Museum of Natural History, and United Way of Santa Barbara County.

2. Strong Families

Affordable Housing:

A partnership to increase the number of affordable housing units in Santa Barbara County.

Partners include: Catholic Charities, Coastal Housing Partnership, Housing Trust Fund of Santa Barbara County, St. Vincent’s, and United Way of Santa Barbara County.

Prescription Drug Discount Program:

Provides a bilingual prescription discount card to more than 10,000 low/moderate income families, saving over \$3 million per year.

Partners include: Bonita School District, Council on Alcoholism & Drug Abuse, Domestic Violence Solutions, First 5 of Santa Barbara County, Girls Inc. of Carpinteria, Head Start, Healthy

Start, Independent Living Resource Center, Isla Vista Youth Projects, Santa Barbara Family Care Center, Santa Barbara Neighborhood Clinics, Santa Barbara Rescue Mission, Santa Ynez Valley People Helping People, St Vincent's Institution, Storyteller Children's Center, Transition House, Unity Shoppe Inc., Visiting Nurse and Hospice Care, and United Way of Santa Barbara County

Community Just Cause Eviction Assistance Program

Partnership to provide rental assistance services to individuals and families who are evicted through no fault of their own.

Partners include: Catholic Charities, University of California Santa Barbara, and United Way of Santa Barbara County.

3. Independent Seniors

Family Senior Caregiver Respite Program:

Partnership to leverage more resources and federal dollars for caregiver respite services.

Partners include: Area Agency on Aging, Friendship Senior Day Care Center, and United Way of Santa Barbara County.

Senior Caregiver Coalition of Santa Barbara County:

A community coalition providing care and services to family caregivers of dependent adults through competent and caring community volunteers.

Partners include: Alzheimer's Association - California Central Coast Chapter, Coast Caregiver Resource Center, Friendship Adult Day Care Center, Independent Living Resource Center, Visiting Nurse and Hospice Care of Santa Barbara, and United Way of Santa Barbara County.

4. Better Communities

Power of Partnership Initiative

A community-wide United Way of Santa Barbara County initiative to develop a community consensus plan for children, family and seniors, consisting of a vision statement, prioritized goals, measurable objectives, benchmarks, and strategies.

Partners include: Dozens of government leaders, elected officials, CEOs, non-profit executives, education leaders, foundation executives, and community volunteers.

211

Santa Barbara County, statewide and national integrated information/referral service and website, available 24/7. Provides phone and web based services.

Partners include: Children's Resource and Referral, County of Santa Barbara, Family Service Agency, First 5 of Santa Barbara County, Santa Barbara County Education Office, Senior Connection, and United Way of Santa Barbara County.

VolunteerSBC!

Partnership with community agencies and local businesses to create a comprehensive website to match community volunteers with the needs of local charities.

Partners include: First 5 of Santa Barbara County, the 39 agencies they support, Isla Vista Youth Projects, Nonprofit Support Center, Family Service Agency, and United Way of Santa Barbara County.

United Way of Santa Barbara County's Day of Caring:

Community organizations partner to support the largest single-day volunteering event in the Tri-

Counties. In just 5 hours on Saturday morning, September 15, over 1,000 volunteers will work at 50 charity sites throughout south Santa Barbara County to achieve \$150,000 worth of results. **Hundreds of Partners including:** Community non-profit organizations, local schools, businesses, and super-star sponsors.

Online Resource/Service Directories

Youth, Educators, and Parents Pages: Links parents, teachers, and students to vital programs and services through an easy-to-use website. www.unitedwaysb.org/helponline.htm and click on YEPP.

Seniors: Up-to-date reference of services focused on supplying and increasing support for seniors and caregivers. www.unitedwaysb.org/helponline.htm and click on Senior Online Resource Directory

Early Childhood: Under development

Child Abuse Prevention: Under development

Foster Children Care & Education: Under development.

Partners include: 211, Area Agency on Aging, Adult and Aging Network, Caregiver Coalition of Santa Barbara, County of Santa Barbara Social Services, Family Service Agency, Friendship Senior Center, Santa Barbara County Education Office, and United Way of Santa Barbara County.

5. Detailed Information on Five Partnership Initiatives:

This section includes detailed information on several key United Way initiatives:

A. Fun in the Sun

B. Youth Investment Partnership

C. Pre-Kindergarten Institutes

D. Day of Caring

E. Volunteer Santa Barbara County!

A. Fun in the Sun (FITS):

In our community, many low-income children do not participate in summer school or any other summer program and find themselves in a very dangerous position during the summer. These children are threatened with isolation, gang violence, drug abuse, and other risky personal and social behaviors. In addition, the lack of structured activities and adult guidance over the summer months leads to a dramatic learning loss which triggers a downward spiral effect on their academic achievement and behavior during the school year.

Twelve years ago, to combat this ongoing problem, United Way launched Fun in the Sun, a highly specialized summer enrichment program for these at-risk children.

The children who attend Fun in the Sun are from the neediest families in the local community. Participants are primarily Latino children in first through sixth grades, whose parents work multiple jobs, have limited proficiency in English or are monolingual Spanish-speakers. These families have extremely limited economic resources, i.e. all are federal low-income qualified for the Free/Reduced Lunch program (income under \$37,000 for a family of four) and/or are referred from local homeless shelters. The program is offered at no cost to these children since their families otherwise could not afford a summer program. FITS also includes a Counselor in Training Program (CIT) for children in seventh through eleventh grades, which focuses on leadership development and age-appropriate programming for youth.

The scale and complexity of the challenges these children face requires a comprehensive solution. More than 30 public and private organizations partner with us each summer to present a research-based, educationally diverse program that is the most comprehensive our community has ever known.

Throughout the all-day, seven week summer session, FITS presents an integrated series of planned educational, artistic, relational, and recreational activities—strategically aligning our efforts to reinforce attitudes and learning that would otherwise languish over the summer months. The aim of these efforts is to provide the children with the tools they need in order to thrive—in the present and the future. FITS strengthens learning skills and gives children a sense of connectedness, as well as the life skills and self-respect they need to produce long-term internal, behavioral, and academic improvements and to resist self-defeating behaviors. To do this, FITS focuses on helping the children develop in three main goal areas: 1) reading achievement and reading enjoyment; 2) positive self identity and self control; and 3) positive perceptions of family and community support.

Besides providing all-day, all-week, all-summer day care programming at no cost for families, Fun in the Sun also recruits partners to provide health and dental screening, character enrichment, Family Advocate services, nutritious daily snacks and meals, sets of new clothing and shoes, and backpacks filled with school supplies to every child.

To address our goal of building positive identity and positive self-control, many activities are designed to increase the children's sense of positive self esteem and group belonging. UWSBC trained staff provide the main instruction for the Character Counts program, which is reinforced by all the providers. Character Counts is a curriculum designed for elementary school age children. The program emphasizes the importance of good character through lessons and adult interaction. The six pillars of Character Counts are: trustworthiness, respect, responsibility, fairness, caring, and citizenship. These pillars are incorporated into multiple subjects and character development is reinforced throughout the day in an age and subject appropriate way.

To address our goal of maintaining or improving upon reading competence and positive perceptions of reading, Girls Inc. join with the Santa Barbara Public Library to provide the reading enhancement component to the program. This curricula is comprised of daily activities around an extensive reading practice, group discussions regarding the books read, words of the day which are integrated into many activities, essay contests, daily journaling, poster creation from the daily reading and words of the day, and personalized reading mentoring.

To address the goal of increasing parent and adult involvement in the childrens' activities and lives, all parents must come and be involved in at least one FITS activity. In addition, many parents also receive one-on-one parenting instruction to help them better meet their child's needs. Also, there are two Parenting Skills Workshops provided for the FITS parents, including information on better communication with their child. Another way in which we address this goal is through our Lunch Bunch program. Each day during lunch time, local volunteers come out and eat lunch, play, and interact with the children. These Lunch Bunch volunteers provide many dozen hours of direct career discussion, modeling, and mentoring.

In the summer of 2008, FITS is currently projecting to serve 400 children at five sites from Isla Vista to Carpinteria. Children in Carpinteria will benefit from FITS at Canalino Elementary School.

United Way of Santa Barbara County's long-term commitment to FITS has enabled children and families to enroll for multiple years, and the cumulative effect has made a significant and measurable positive impact. In 2006 and 2007, a Senior Researcher from PRES Associates and a Ph.D candidate at Claremont Graduate University, Miriam Resendez, took the lead in evaluating the impact of FITS. The results were astounding. With a demographic group that usually loses two months of reading

achievement over the summer break, FITS helped 76% of the children increase their reading abilities by over 12%.

Fun in the Sun has proven so effective at improving reading achievement levels, as well as promoting positive self-identity, character development, and positive behavior choices, that the Santa Barbara School District asked that Fun in the Sun sites act as School District summer schools this year.

B. Youth Investment Partnership:

Search Institute was founded in 1958 as an applied social science research organization focused on the healthy development of young people. Since then, their mission has evolved to a broad focus on the healthy development of all children and youth in multiple settings in community and society. In 1996, Search Institute launched the Healthy Communities-Healthy Youth initiative. This initiative seeks to motivate and equip individuals, families, organizations, and communities to work together to build Developmental Assets for and with children and adolescents. To date, 560 communities across the United States and Canada have formed asset-building initiatives. In addition, 24 states and two Canadian provinces have formed statewide networks.

Search Institute has surveyed over two million youth across the United States and Canada since 1989. Researchers have learned about the experiences, attitudes, behaviors, and the number of Developmental Assets at work for these young people. Studies reveal strong and consistent relationships between the number of assets present in young people's lives and the degree to which they develop in positive and healthful ways. Results show that the greater the number of Developmental Assets experienced by young people, the more positive and successful their development will be. The fewer the number of assets present, the greater the possibility these youth will engage in risky behaviors such as drug, alcohol and tobacco use, unsafe sex, and violence.

In 2001, United Way of Santa Barbara County began meeting with Channel Islands YMCA and the Council on Alcoholism and Drug Abuse to develop and implement Asset Building activities targeted for local youth. Initial activities included conducting an Asset Survey at Dos Pueblos High School to determine where our community stood with regards to the number of assets our youth possess. Results indicated our youth experienced slightly more than 19 assets on average, similar to the national norm. The Search Institute's research indicates that children need at least 25 assets to have the proper foundation to thrive in school and in life.

The Youth Investment Partnership will provide a comprehensive framework for growing the number of assets that local youth possess, providing them with the support and character to develop into successful adults. The initiative plans to begin by introducing and building assets at the heart of where children get much of their valuable learning – in their schools; then moving out in concentric circles of involvement into the greater community.

The Search Institutes extensive research reveals that the more assets that youth possess, the stronger their foundation is for making positive choices and avoiding negative behaviors. For youth who possess 30-40 assets, high-risk behaviors such as problem drug and alcohol use, early sexual activity, and violence decline dramatically and thriving behaviors such as success in school, exhibiting leadership, valuing diversity, and maintaining good health, soar in converse proportion.

What are the 40 Developmental Assets?

External Assets

Support

1. Family support – Family life provides high levels of love and support.
2. Positive family communication – Young person and her or his parent(s) communicate positively and young person is willing to seek advice and counsel from parents.
3. Other adult relationships – Young person receives support from three or more non-parent adults.
4. Caring neighborhood – Young person experiences caring neighbors.
5. Caring school climate – School provides a caring, encouraging environment.
6. Parent involvement in schooling – Parent(s) are actively involved in helping young person succeed in school.

Empowerment

7. Community values youth – Young person perceives that adults in the community value youth.
8. Youth as resources – Young people are given useful roles in the community.
9. Service to others – Young person serves in the community one hour or more per week.
10. Safety – Young person feels safe at home, school and in the neighborhood.

Boundaries and Expectations

11. Family boundaries – Family has clear rules and consequences and monitors young person's whereabouts.
12. School boundaries – School provides clear rules and consequences.
13. Neighborhood boundaries – Neighbors take responsibility for monitoring young people's behavior.
14. Adult role models – Parent(s) and other adults model positive, responsible behavior.
15. Positive peer influence – Young person's best friends model responsible behavior.
16. High expectations – Both parent(s) and teachers encourage the young person to do well.

Constructive Use of Time

17. Creative activities – Young person spends three or more hours per week in lessons or practice in music, theater, or other arts.
18. Youth programs – Young person spends three or more hours per week in sports, clubs, or organizations at school and/or in the community.
19. Religious community – Young person spends one or more hours per week in activities in a religious institution.
20. Time at home – Young person is out with friends “with nothing special to do” two or fewer nights per week.

Internal Assets

Commitment to Learning

21. Achievement motivation – Young person is motivated to do well in school
22. School engagement – Young person is actively engaging in learning.
23. Homework – Young person reports doing at least one hour of homework every school day.
24. Bonding to school – Young person cares about her or his school.
25. Reading for pleasure – Young person reads for pleasure three or more hours per week.

Positive Values

26. Caring – Young person places high value on helping other people.
27. Equality and social justice – Young person places high value on promoting equality and reducing hunger and poverty.
28. Integrity – Young person acts on convictions and stands up for her or his beliefs.
29. Honesty – Young person “tells the truth even when it is not easy”.
30. Responsibility – Young person accepts and takes personal responsibility.

31. Restraint – Young person believes it is important not to be sexually active or to use alcohol or other drugs.

Social Competencies

32. Planning and decision making – Young person knows how to plan ahead and make choices.
33. Interpersonal competence – Young person has empathy, sensitivity, and friendship skills.
34. Cultural competence – Young person has knowledge of and comfort with people of different cultural/racial/ethnic backgrounds.
35. Resistance skills – Young person can resist negative peer pressure and dangerous situations.
36. Peaceful conflict resolution – Young person seeks to resolve conflict nonviolently.

Positive Identity

37. Personal power – Young person feels he or she has control over “things that happen to me”.
38. Self-esteem – Young person reports having a high self-esteem.
39. Sense of purpose – Young person reports that “my life has a purpose”.
40. Positive view of personal future – Young person is optimistic about her or his personal future.

C. Pre-Kindergarten Summer Institutes:

Pre-Kindergarten programs that provide a quality learning environment lead to important development in children’s intellectual and social capabilities – factors critical to their future success in school and in life. Young children from low-income families, who lack access to or awareness of these early childhood opportunities, begin their scholastic career with an imposing deficit. Many of these children never have the chance to catch up with their middle-income peers. According to the Healthy Start Director, approximately half of the Santa Barbara Elementary School District’s incoming kindergartners are deeply under-prepared for the school experience that awaits them: formal standards and assessments, structured classes, and instruction in English. Many children struggle from the start without some transitional help. They may not know English, or how to use scissors, sit still in a circle, share, or cope with frustration.

Launched in 2001, the Pre-Kindergarten Summer Institute program provides a condensed, high quality classroom experience that helps children be more ready to enter school, to feel supported as learners, and to feel comfortable interacting in a social setting. Delivered on elementary school campuses where the children will become kindergartners, the program aims to help these 4½ year old children feel they belong at school, help them practice appropriate classroom behavior, and develop a variety of skills essential to kindergarten success as well as long-term academic and behavioral improvements.

Towards these goals, the program seeks to improve children's capability in four key developmental areas: social/emotional development, language skills, approach to learning, and motor skills. In addition, the program also strives to provide activities that help parents to gain specific knowledge about how to help their children learn, engage in parent-child learning activities, feel more comfortable talking with their child's teacher, and access community support services.

There are two separate components to our Pre-Kindergarten Summer Institute program. One is administered through the Santa Barbara School District (SBSD) and the other through Isla Vista Youth Projects (IVYP). At our SBSBD component, we provide a high quality, well-coordinated and materials-rich learning experience that helps each child develop and/or improve several important skills. We are able to individualize the teaching by having a small student/teaching staff ratio (Average: 7.5:1) and are able to provide these children with a daily, very positive school environment, paced to their particular learning needs, and supportive of their efforts to adapt to a

structured school setting. The result is that these children enter kindergarten class with more confidence, more knowledge, and are better prepared to succeed.

At the SBSB sites, the program strengthens families and parents through: a) targeted, persistent outreach to recruit their underserved or high need children to the program; b) interviewing each family to identify their access to or need for health and dental care/insurance and other basic needs; c) referrals and case management as necessary. We help parents enroll children in the school's free or reduced lunch program and tell them about its Family Resource Center and about the 211 helpline. We also incorporate how to read to your child as a weekly element for parents. The program provides parent workshops on discipline and children's learning where parents learn strategies for caring, effective communication, and the importance of consistent, respectful discipline for child development/learning and for parent-child relationships. Each summer institute class also organizes an end of class celebration for the families.

At the IVYP site, the Summer Pre-K Institute provides 25 children with educational support the month before they enter Kindergarten. The participants involved are those who have had very little school experience or those who need additional assistance preparing for the transition to Kindergarten. Our staff meets with the Kindergarten teachers to discuss the abilities of each child and areas where the child is struggling. This allows Kindergarten teachers to place the child in a classroom that will best meet each child's needs. This type of communication allows us to develop and strengthen our curriculum, which in turn allows us to better prepare the children to enter Kindergarten. Families also receive support for kindergarten registration/screening, as well as resources and referrals through our Family Resource Center. All children receive scholarships to attend Safety Town at Isla Vista Elementary School for a one week (sponsored by Soroptimist International). Each family also receives seven Home Play Learning Kits to foster vital skill development at home.

The 2007 Pre-Kindergarten Summer Institutes helped 160 children prepare for the 2007/08 school year. The evaluation report, based on teachers' pre/post assessments, found significant improvements in the four measured skill areas; Social/Emotional skills, Language skills, Approach to Learning in the classroom, Motor skills.

- In the Social/Emotional skills area, the students' mean scores significantly improved by 37%.
- In the Language skills area, the students' mean scores significantly improved by 47%.
- In the Approach to Learning skills area, the students' mean scores significantly improved by 33%.
- In the Motor skills area, the students' mean scores significantly improved by 28%.

These outcomes reflect the vital benefits the children receive in school and life readiness by attending the Pre-Kindergarten Summer Institutes. The activities and environment provided by the program strengthen children and families in ways specifically designed to help them succeed.

D. Day of Caring:

Local nonprofit organizations dedicate countless hours of community service to Santa Barbara County, yet they often run on a "barebones" budget. For the past 16 years, United Way of Santa Barbara has provided an opportunity for the community to provide much-needed help to these organizations by conducting their annual Day of Caring, the largest single-day volunteer event in the Tri-county area.

Every year, on the second Saturday in September, volunteers from across the county unite with one common goal; to provide direct and indirect benefit to people in need by donating their time to help

local charities. In 2007, over 1,000 volunteers participated including young people from local schools, families, churches, and community service groups.

After a rousing kick-off breakfast, made possible by generous sponsorship from many local businesses, the volunteers then disperse to over 50 charity sites throughout south Santa Barbara and spend 4 hours completing much needed “hands-on” tasks such as indoor and outdoor painting, gardening, sorting and organizing contributed goods, and general repairs. These projects directly benefit the charitable agencies, and the people who are helped by them.

The contribution of services that the Day of Caring provides goes a long way to make up for charitable organizations hit hard by budget cuts and reduced cash donations. Last year, the volunteer services were valued at over \$150,000.

E. Volunteer Santa Barbara County! (www.volunteersbc.org)

In Santa Barbara County, there is no centralized coordination for the recruitment, education, and/or training of volunteers to effectively serve non-profit organizations and schools. Due to many factors including infrastructure costs, a bricks and mortar volunteer center is not a feasible option for our community. One of the greatest needs that local non profits have is for qualified, effective volunteers to help them in the pursuit of their mission, including qualified Board Members. Our communities have many individuals who would like to volunteer their time but lack a clear method to learn about various volunteer opportunities and how to contact the appropriate agencies. Volunteer Santa Barbara County! (VSBC) will work to increase the potential volunteers’ awareness of opportunities and facilitate the interface between agency and volunteer. VSBC will help to provide non profit organizations with the volunteers they need in order to serve their constituency most effectively.

In our continuing commitment to growing volunteering opportunities within Santa Barbara County, United Way is launching a new, county-wide volunteer website for individual volunteers and charitable agencies in need of volunteers. The site will be intrinsically different and more effective than other volunteer websites such as Volunteer Match. Those sites essentially show a listing of various volunteer opportunities for people to look through. Volunteer Santa Barbara County’s website offers technology that creates a dynamic interchange between volunteer and agency that enables volunteers to choose from a variety of agencies and volunteer opportunities that have been automatically selected due to matching interests and availability. Both the agency and the potential volunteer specify volunteer opportunities based upon areas of interest, age of volunteer, age of clients, types of skills, time of day or year available, frequency, and other criteria, then the technology matches them.

The website will then offer the volunteer the four best matches. As new matching opportunities arise, the website will generate an email detailing the opportunities. The technology behind Volunteer Santa Barbara County functions a little bit like the E Harmony web-based dating service except for volunteering. Volunteers coming to our website will be able to choose from a variety of volunteer opportunities that fit their interests and dedication to our community. By registering on our volunteer website, charities will be able to update their varying needs on a continual basis and volunteers will be notified through an automatic email of all of these updated volunteer opportunities. As of April 2008, VolunteerSBC! has 650 volunteer opportunities.

VIII. United Way’s Evolving Future, Building on Today

UWSBC’s vision is to provide a hopeful future for each person in the community. Towards the achievement of the mission and vision, UWSBC seeks to craft effective agendas within and across communities, build coalitions around these agendas, increase investments in these agendas, and create

innovative partnerships to address a wide variety of needs in the local community. During the past year, 80 interrelated services worked together to comprise the *Power of Partnership*[™]. Each dollar contributed is a solid investment in the health and vitality of all people in the local community.

United Way has leveraged its strengths to transform its role in the community and will continue to do so. United Way's strengths are its long term credibility in the community, its depth of knowledge of the community on all levels, and its ability to convene diverse groups including business, public sector, nonprofit, and individual leaders in the service of community needs. It also has the benefit of a long term executive director, a stable board, a diverse range and large number of supporters and donors, a consistent history, and a strategic plan for the future.

Due to its unique role in the community, United Way is able to leverage both hidden and obvious community resources to create strategic partnerships for change.

Over the past few years, UWSBC has been involved in coordinating, directing, and/or participating in more than twenty-eight collaborative, strategic initiatives positively impacting the lives of local people. In addition, UWSBC partners with many local organizations to provide a network of more than seventy-five interrelated health and human services centering around child and youth development, families, seniors, safe communities, health care, and changing the underlying community conditions giving rise to crisis situations in peoples' lives.

In the future, United Way will continue to develop its role as the convener and/or facilitator of a network of community relationships that support at risk children, families, and seniors by building on community and individual collective assets. United Way's future involves positively impacting the social and economic conditions that combine to impact an individual or family in a negative way. UWSBC endeavors to turn these conditions around to create ongoing positive impacts on individuals in need.

IX. The United Way Brand Value Proposition

The Partnership and Investment Model

Partnerships with Groups and Agencies:

United Way brings diverse people and resources together to address the urgent and important issues that the Santa Barbara community faces. Through unique partnerships and approaches United Way mobilizes resources beyond the dollars that are pledged with their fundraising efforts. Community partners often include schools, government agencies, businesses, employees, financial institutions, voluntary and neighborhood associations, retirees, community development organizations, and the faith community: The *Power of Partnership*[™]!

United Way's Community Impact Agenda only focuses on work which concerns children, family, seniors and community building in Santa Barbara County. Agendas are set by a broad range of caring individuals, dedicated to making a difference in the lives of children, families, seniors, and neighborhoods. Included are those directly affected by the agenda and community-based organizations. Strategies include identifying and building on community strengths and assets, supporting programs and initiatives, advocating for public policy changes, and collaborating with others in support of these and related issues every day.

Partnerships with Individuals:

In the past, UWSBC worked primarily with businesses and corporations, and through that avenue established relationships with individuals. Over the recent past, work with individual donors outside

of the large business or corporate setting has increased as community demographics, social and economic factors have changed. Larger businesses are moving out of the area or are no longer offering local decision making for charitable giving, while individual entrepreneurs, retired people, small foundations and other donor prospects are becoming more prevalent. This changing economic and social situation requires a different approach.

The new donor wants to leverage his/her investment and wants to know results and outcomes of investments. He/she wants to be kept informed.

In order to respond to the situation described above, United Way created the new model of donor relations, The Brand Value Proposition, shown in the Strategic Plan. The brand is the accumulated series of experiences people have with United Way. More than a name or a logo, the brand incorporates and reflects the images, ideas, values, and behavior that define who United Way is and why it is different. The customer is the investor—who aspires to improve peoples' lives and make the community stronger. The brand is a promise of results—a promise that United Way makes, not only to its investors, but to itself and our community as well.