

SANTA BARBARA UNITED

A NEWSLETTER FROM UNITED WAY OF SANTA BARBARA COUNTY

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90th Annual Awards

UNITED WAY OF SANTA BARBARA COUNTY

United Way of Santa Barbara County hosted its 90th Annual Awards Celebration at the Four Seasons Biltmore Resort in Montecito, on Wednesday, May 15, 2013. This annual dinner recognizes local organizations and individuals for contributing to the community and United Way activities, such as its award winning Fun in the Sun program. The event was made possible partially by the Biltmore's and Floral Ambiance's generous sponsorships. First District Supervisor Salud Carbajal, Master of Ceremonies, was

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Financially Empowering the Community

UNITED WAY OF SANTA BARBARA COUNTY'S FINANCIAL EMPOWERMENT PARTNERSHIP (FEP) is a collaborative effort involving 21 organizations and businesses to help families achieve financial stability in Santa Barbara County by building long-term financial assets. FEP provides financial literacy classes, access to affordable financial savings products, and free tax assistance through the national Volunteer Income Tax Assistance (VITA) program for families earning less than \$53,000 a year.

This tax season, 185 volunteers prepared 2,638 tax returns, bringing back \$4.7 million in refunds to the community. Of those volunteers, 65% were high school and college students. The Regional Occupational Programs at Dos Pueblos High School, Santa Barbara High School, and Santa Ynez High School, as well as UCSB Associated Students' VITA Club, collaborated with United



UWSBC President & CEO Paul Didier, Jenny Aguilar, Dave Meister, Jesus Terrazas, Rachel Bishop & Lee Ann Knodel from Dons Net Cafe

Way to give students an opportunity to gain real-life experience and career ready skills in tax preparation while giving back to those who need this service most in Santa Barbara County.

Only 62 high schools across the country offer this program, three of which are now in Santa Barbara County. All students and volunteers participating in the program are required to pass IRS certification tests at basic, intermediate, and/or advanced levels. This year, for the first time in Santa Barbara County history, three Santa Barbara High School students, Jenny Aguilar, Rachel Bishop, and Jesus Terrazas successfully passed all three IRS certification exams to become advanced tax preparers. Preparing taxes at an advanced level means they can assist individuals and families with a variety of the most complicated of tax returns with multiple schedules. Together we will increase the number of lower-income families who are financially stable in Santa Barbara County.

Renee Grubb to Lead the 2013-2014 Community Campaign

President of Village Properties to join as Community Campaign Chair

RENEE GRUBB, PRESIDENT OF VILLAGE PROPERTIES will lead United Way of Santa Barbara County's 2013-2014 Community Campaign as the Community Campaign Chair. The Chairs' main role is to provide leadership, direction, and support to the Campaign Cabinet to ensure a successful campaign.

Renee Grubb founded Village Properties in 1996 with her business partner, and has since been successfully in business. Renee's innovative ideas, however, do not stop with real estate. She is also a pioneer for charitable giving here in Santa Barbara. The establishment of the award winning "Teacher's Fund," to help local public and private elementary, junior high and high school teachers buy the supplies and books they so desperately need, only shows a small part of her rare dedication to the community and education. This fund also aligns with United Way's 10-year community driven goal focused in education.

Community service and volunteering are an ongoing part of her professional and personal life. Currently

Renee serves as the newly-elected Chairwoman of the Board of Directors for the Santa Barbara Region Chamber of Commerce. She also served as President of the Santa Barbara Association of Realtors in 1995. Other affiliations include: Member of the Montecito Education Foundation, Chairperson twice for the American Heart Association, Vice President of the Santa Barbara Chamber of Commerce, Graduate of the Mediation Institute of Santa Barbara, and is also a South Coast Business & Technology Committee Member since 2004.



Renee Grubb

We are happy to welcome her to the United Way Community Campaign!

90th Annual Awards Celebration

Continued from page 1

assisted by Cynder Sinclair, CEO of Nonprofit Kinect in presenting the evening's awards.

Special appreciation was given to Anne Smith Towbes as outstanding "Fun in the Sun Individual of the Year"; Montecito Bank & Trust, Community Impact Organization of the Year; and Union Bank, for their continued outstanding employee & corporate participation in helping United Way reach their community driven 10-year goals.

"There are so many other United Way activities and so many more individual, family, and senior stories that all of you here, plus thousands more, have helped create and make real. Thank you all. You are part of a community team that produces and multiplies excellence" said Paul Didier before the award ceremony began.



Alex Koper, David Prichard, Eve Ortiz and Holly Ann Nelson from Bank of America

A total of 30 awards were given to local volunteers, as well as businesses, schools, organizations and the individuals that lead them for their outstanding support of United Way of Santa Barbara County and its numerous programs in the Santa Barbara Community.

For pictures of the event and a full list of winners please go to unitedwaysb.org or scan this code:



2013- 2014 Board of Directors

Board Officers

John Hanna - Board Chair

Former Business Executive

Diane B. Doiron, CLU - Vice Chair

Doiron Financial Associates

Joe Holland - Vice Chair

County of Santa Barbara

G. Paul Didier, CFF, MBA - Board Secretary

United Way of Santa Barbara County

Rick W. Scott - Chief Financial Officer

Cancer Center of Santa Barbara

Board Members

James Armstrong - *City of Santa Barbara*

David Cash, Ph. D. - *SB School District*

Lance Connor - *Reliable Engineering Service*

Ron Cortez - *University of California, SB*

Henry Dubroff - *Pacific Coast Business Times*

Blas Garza - *Cal Lutheran University*

Lori Gaskin, *Santa Barbara City College*

Renee Grubb - *Village Properties*

John Karbula, *Solvang School District*

George Leis - *Union Bank*

Cliff Lundberg - *Westmont College*

Bob Montgomery - *Montgomery Vineyards*

Mike Nissenson - *Real Estate Executive*

Mike Noling - *Community Volunteer*

David Prichard - *Bank of America*

Ron Werft - *Cottage Health System*

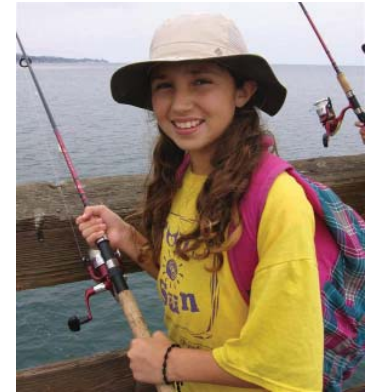
John Wigle - *AGIA Insurance Services*

Fun in the Sun 2013

Education Beyond the Classroom

FUN IN THE SUN (FITS) HAS BEEN PROVIDING COMPREHENSIVE services for children and their families during the summer months for the last 17 years. With the collaboration of an array of community partners (involving 63 service delivery partners, 19 funding partners, and 500 volunteer mentors), FITS serves an average of 250 financially and academically at-risk children (ages 7-18) for seven weeks each summer. All participants come from low-income families and qualify for free and reduced-price meals during the school year.

This year, FITS seeks to improve the academic, social, behavioral and life skills of each participant while reducing and reversing summer learning loss which research shows accounts for two thirds of the achievement gap separating income groups. The program offers participants a fun learning environment with a daily emphasis on literacy, including reading and writing. Afternoon enrichment opportunities include activities in science, technology, engineering, arts, and math (STEAM), service learning, and field trips throughout the summer. In 2012, 76 percent of participants showed an average of 2 reading grade level gains, according to program evaluation.



FITS participant at a fishing field trip



FITS participants touring BEGA in Carpinteria

By utilizing the strengths of over 60 local partners, the program offers a comprehensive package that no single organization can provide on its own. In fact, because of its success in reversing summer learning loss, last year FITS was awarded the 2012 Excellence in Summer Learning Award from The National Summer Learning Association (NSLA), an affiliate of Johns Hopkins University. Since 1997, 90 community partners have contributed to the program's success and the program has served more than 2,500 local children and 1,500 parents.

Local individuals and groups have the opportunity to volunteer an hour of their lunchtime to serve as mentors for FITS students. During "Lunch Bunch", the volunteer mentor component to Fun in the Sun, students learn about different career and academic paths and are encouraged to succeed while volunteers enjoy a fun and rewarding experience.

To volunteer or to receive a private tour, please contact Ashley King at aking@unitedwaysb.org or 965-8591 x116.

Alexis de Tocqueville & Leadership Circle News

20th Annual Thank You Reception



Mike Noling, Dennis Forster and David Prichard



James Tamborello, Mike Nissenson with Jim & Stephanie Sokolove

MEMBERS OF THE ALEXIS DE TOCQUEVILLE SOCIETY and Leadership Circle gathered on May 23rd, 2013, at the El Encanto for the 20th Annual Thank You Reception to enjoy perfect weather, wonderful wines, fabulous food and great company in an exquisite setting. In 2012, United Way's Leadership Circle was comprised of 334 individuals who pledge between \$1,000 and \$9,999 from home and in the workplace. Their combined gift was over \$680,936.

Members of the Alexis de Tocqueville Society make a gift of \$10,000 or more on an annual basis to United Way. In 2012, 30 individuals, couples and local family foundations contributed over \$570,000 for United Way programs.

This recognition event was made possible by the generosity of Credit Suisse Securities which



Michele & Benjamin Helvey

sponsored the event, Bridlewood Estate Wines, for providing their wonderful wines and Paper Ink, for partially sponsoring the invitations.

Paul Didier, United Way's President & CEO, addressed the members: "These are 350 people who generously donate to support our

partnerships and services for local children, families & seniors and help United Way meet Santa Barbara County's 10-year community driven goals in Health, Financial Stability and mainly - Education. With the help of these community members, United Way is able to ensure the betterment of the Santa Barbara Community."

REDUCE YOUR 2013 TAXES
With an IRA gift

Did you know that you can reduce your taxes for 2013 by making a gift from **YOUR IRA TO CHARITY?**

The fiscal cliff law permits individuals who are 70½ to roll over up to \$100,000 from their IRA to charity free from federal income tax. Better yet, an IRA rollover gift qualifies for your 2013 required minimum distribution, permitting you to lower your income and taxes for this year while helping our cause.

Contact us to learn more about how you can redirect unneeded IRA income to charity, help further our mission and enjoy valuable tax savings this year.

Heritage Club Celebrates 28 Years

UNITED WAY'S HERITAGE CLUB IS MADE UP OF FORWARD-THINKING PEOPLE who have chosen to leave



Mike Berquist, Marilyn Anticouni & Joe Green

their legacy to this community as part of their overall estate plan. Each year we celebrate this elite group of supporters during a private luncheon, and this year it took place at the historic Santa Barbara Club on Wednesday, June 5th. Twenty-seven Heritage Club members and their guests enjoyed the plush garden views as they celebrated United Way's successes that are made possible as a result of Legacy Giving.

The Heritage Club Luncheon was generously sponsored this year by Union Bank.

Heritage Club members extend their United Way support for generations to come through wisely planned gifts. Their gifts come in many forms, including Charitable Remainder Trusts, Gift Annuities, Donor Advised Funds, Pooled Income Funds, Bequests, and gifts of Retirement Accounts or Life Insurance policies.

United Way's Endowment and Gift Planning Services Program, under the guidance of a premier group of volunteer estate and financial planning professionals, offers a variety of techniques which are individually tailored to achieve the philanthropic goals of our donors. These gifts are invested in at least one of five Endowment Funds which provide a solid foundation of perpetual support for United Way of Santa Barbara County. These endowments ensure the future of United Way's unique and innovative programs for generations to come.

United Way's Endowment and Gift Planning

If you have named United Way in your estate plan, please let us know so that we might have the opportunity to thank you for your thoughtful generosity and to honor you as a member of the Heritage Club.

To learn more please contact our Gift Planning Services Officer, Judy Goodbody, CFRE, CRTP at 965-8591 ext.120 or email jgoodbody@unitedwaysb.org or visit our website at www.unitedwaysb.org/giftplanning.

Please complete and return this reply coupon

- Please send me free literature about gift planning (check all applicable)
 Gift Annuities Charitable Remainder Trust Gift of IRA or Retirement Plans
 Gift of Stocks Gift of Real Estate Other _____

I have already included United Way of Santa Barbara County in my estate plan.
 Please tell me how I qualify as a member of the Heritage Club.

Please contact me about a free no-obligation personalized estate planning illustration.

Name: _____ Phone: _____

Address: _____

City, State, Zip: _____

e-mail: _____ Fax: _____

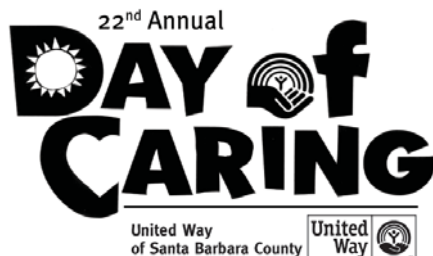
Mail this form in the enclosed return envelope, attention Judy Goodbody, CFRE, IAR, CRTP
 Gift Planning Services Officer, or mail to: United Way of Santa Barbara County,
 320 E. Gutierrez Street, Santa Barbara, CA 93101-1736, or fax to 962-3461



Tom & Barbara Brashears

Save the Date for the 22nd Annual Day of Caring

Lend a Hand, Build a Community



THE 22ND ANNUAL DAY OF CARING WILL TAKE PLACE on September 28, 2013. This is the largest one-day volunteer event of its kind in the Tri-Counties! Each year, thousands of volunteers gather to complete over \$350,000 worth of work at local non-profits and other charitable organizations. The work sites vary from parks to schools, churches and shelters and the work performed includes painting, gardening, landscaping, cleaning, building, organizing and much more...

Event Details:

Saturday, September 28, 2013

Free Kick-Off Breakfast at Page Youth Center

4540 Hollister Avenue at 8:00 AM

Volunteer at various sites from 9:00 AM to 1:00 PM

For more information on sponsorship, project submission and volunteering, please check our website: unitedwaysb.org/dayofcaring or scan this code



Virtual Reading Summer Camp



Local schools and programs are partnering with United Way of Santa Barbara County to give students the opportunity to improve reading comprehensions over the summer. Research shows when students complete 25 or more United Way Power Reading sessions they will show an average increase of 2 reading levels.

This is your opportunity to enroll your child and family!

Students who complete 30 or more 30-minute sessions of United Way's Power Reading from June 17- August 17, 2013 will be eligible to win family prizes. Parents who participate with their child and complete 30 or more sessions will also be eligible to win family prizes.



To sign up for Virtual Reading Summer Camp, please contact Laura Finlay at

lfinlay@unitedwaysb.org or

965-8591 x122

Registration Fee: \$20/family of three

Each additional person: \$5



Amber Ortiz Completes Four Years of Service as YLS Chair

WE WOULD LIKE TO THANK AMBER ORTIZ FOR HER FOUR YEARS of service on the Young Leaders Society Executive Committee. Amber has demonstrated extraordinary leadership in her devotion to the community of Santa Barbara. She is a catalyst for volunteerism and effortlessly empowers those around to give back what they can in time, talent, and treasure.

During summertime you will find Amber volunteering at Franklin Elementary School as a mentor through United Way's Fun in the Sun program for local low-income at-risk youth. She has volunteered

with the program for over 8 years.

As the chair of United Way's Young Leaders Society and member of United Way's Leadership Circle Committee, she has been an instrumental leader in inspiring other professionals to take time to participate in philanthropic and volunteer endeavors.

Ortiz is stepping down as the Chair of the Young Leaders Society Executive Committee to have her first child, due later this June. Thank you Amber & congratulations on the new family addition!



Amber Ortiz at Fun in the Sun Lunch Bunch

For the Love of Green



YLS Members and guests at SB Lawn Bowls Club

YLS members and guests gathered at the Santa Barbara Lawn Bowls Club on June 20, to learn more about the benefits of green business certification and a green life style. Kent Epperson from Santa Barbara County Association of Governments, along with Erik Haney from Movegreen gave an informative presentation, followed by guests enjoying the sunset, wine & lawn bowling!

Upcoming YLS Events

<p>Fun in the Sun Lunch Bunch:</p> <ul style="list-style-type: none"> July 2 and July 11 from 11:45 - 1:15 PM Franklin Elementary School 1111 East Mason Street 	<p>Day of Caring:</p> <ul style="list-style-type: none"> September 28 from 8:00 - 1:00 PM El Camino Elementary School
<p>Summer BBQ:</p> <ul style="list-style-type: none"> August 18 from 12:00 - 3:00 PM Oak Park 	<p>United We Bowl:</p> <ul style="list-style-type: none"> November 15 from 6:00 - 8:00 PM Zodos Bowling & Beyond \$30/bowler & \$180/team of 6

For more info go to www.unitedwelead.org

2013-14 YLS

Executive Committee:

Chair:

Sarkes Khachek

Santa Barbara County Association of Governments

Past Chair:

Amber Ortiz

Union Bank

General Members:

Eric Bravo

Edward Jones

David Duarte

MacFarlane, Faletti & Co.

Lee Foster

Santa Barbara Bank & Trust

Aaron Gilles

Village Properties

Alex Koper

Bank of America

Steve Ortiz

United Way of Santa Barbara County

Kerstin Padilla

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