

2025 ANNUAL REPORT



UNITED IS THE WAY





This year we celebrated the 25th Anniversary of having one United Way in Monterey County. The decision to merge United Way of the Salinas Valley and United Way of the Monterey Peninsula was made in 1999 with great vision and foresight, and on June 30, 2000 United Way Monterey County was born. In the intervening quarter century, we have brought resources, innovation, caring and connection to the people throughout Monterey County. Each year has brought new opportunities and challenges, and I continue to be inspired by our volunteers, staff, donors and community partners as we continue to band together for the greater good.

This past year brought challenges to our community in the form of shifting federal policies and funding freezes that negatively affected our most vulnerable residents. Yet the resilience of our community continues to show, as people step up with generosity and kindness to help us fill service gaps and boost opportunity. With your help we will continue to do so.

United is the way we create a better future for all.

Katy Castagna,
President and CEO

FAST FACTS



6,500 new backpacks packed with essential school supplies distributed to students in need



367 community members obtained or maintained housing



\$2.47 million in tax refunds delivered to working families

18,753 referrals provided by 211 Monterey County



Mission: Connecting people, partners, and pathways to improve lives across Monterey County

Vision: A thriving, united community where everyone has the opportunity to succeed

FINANCIAL SECURITY

Creating a stronger financial future for every generation

California Work Opportunity and Responsibility to Kids (CalWORKs) is a public assistance program that provides cash aid and services to eligible families with children in the home. UWMC, in partnership with the Monterey County Department of Social Services, matches clients with community service positions to build job skills, references, and connections. Over the past year, 159 customer referrals were made for Job Site Training and Case Management support totaling over 10,500 volunteer hours.

Financial Literacy Education Workshops empower people to take charge of their financial future. From one-time workshops that introduce budgeting and savings to multi-week series that guide participants step by step, the program supports people at every stage of their financial journey. In the past year, 642 participants attended 34 workshops, with 587 demonstrating improved knowledge and financial literacy skills.

Volunteer Income Tax Assistance (VITA) Program is a free tax preparation service for low-to-medium income working families and individuals throughout Monterey County. This service operates with the help of IRS-certified volunteers. 83 volunteers filed 1,305 tax returns for Monterey County residents. A total of \$2,470,000 was generated in Federal and State refunds.



YOUTH OPPORTUNITY

Helping young people realize their full potential

The Family, Friends, and Neighbors (FFN) Network empowers caregivers within their own communities, honoring each family's culture and language while providing the tools children need to succeed in school. Through 122 playgroups, trainings, workshops, and reflective sessions, 77 FFN providers gained tools and support to nurture and prepare children for kindergarten. These providers cared for 115 children, with 83% showing increased knowledge, skills, and confidence to build children's language and literacy development.

Monterey County Preschool Service Corps (PSC) Program places AmeriCorps members in preschools to provide individualized language and literacy tutoring. Members support kindergarten readiness and help children who are below age level in literacy. 18 members provided educational support to 109 children at 10 sites throughout Monterey County.

Preschool Spruce Up - UWMC upgrades play facilities at early childhood education centers throughout the county. The goal is to ensure that early learning environments are well-equipped to stimulate the social, emotional, and academic development of our youngest learners. 20 volunteers renovated the Art Room at Seaside Child Development Center.

Dr. Martin Luther King Jr., Day of Service: UWMC organizes opportunities for volunteers to engage in various community service activities and hosted a book drive, providing 360 new books to 13 preschool classrooms thanks to a grant from California American Water.

Read Across America celebrates children literacy by reading books throughout Monterey County on National Education Association's Read Across America Day. 20 volunteers engaged with preschool and kindergarten students promoting literacy and a love for reading.

Stuff the Bus provides new backpacks filled with age-appropriate school supplies to K-12 students who are experiencing homelessness or housing instability in Monterey County. This year, a total of 6,500 backpacks were provided with the help of 500 volunteers.

HEALTHY COMMUNITY

Improving health and wellbeing

The Hope and Help Network is focused on supporting Mental Health and Substance Use Disorder programs across Monterey County. It has strategically evolved from an information-sharing program into a collaborative action network. By convening partners to jointly address pressing system challenges, the Hope and Help program has emerged as a catalyst for coordinated community response.

Over the past year, the program has taken a leadership role in defining critical issues in the delivery of behavioral health care, drawing together a diverse set of partners that extend well beyond traditional mental health and substance use service providers.

COMMUNITY RESILIENCY

Addressing urgent needs today for a better tomorrow

United Way Monterey County Community Impact Center- Since opening in 2022, the Impact Center has become a hub for collaboration and innovation, where nonprofits unite to help families access housing, childcare, education, and financial stability. In the past year, 195 meetings were held with 34 different organizations serving over 3,996 people. The Impact Center also welcomed the Monterey County Office of Education, Educational Services and Student Services, and Parenting Connection of Monterey County as tenants.

211 Monterey County is a free, confidential information and referral helpline and website that connects people to essential health and human services 24 hours a day, seven days a week. It provides resources for a variety of needs, providing 18,757 referrals, from 12,308 contacts across text messages and phone calls. The most requested services in our community were electric service payment assistance, homeless shelters, and rent payment assistance.

The Smart Referral Network (SRN) allows users to make "closed loop" referrals. Case managers, other front-line workers, and residents in need of services use the program to identify needed services in the 211 Monterey County health and human service database to more effectively enroll clients. Currently, 94 agencies participate in the SRN, referring clients to each other's services.



2025 FINANCIALS

STATEMENT OF ACTIVITIES

SUPPORT AND REVENUE

Pledges, net	\$947,476
Grants and Contracts	\$1,991,461
Rental Income	\$377,833
Other	\$625,427
Investments	<u>\$288,417</u>
	\$4,230,614

EXPENSES

Community Investments net	\$395,387
Community Services	\$2,144,614
Impact Center	\$294,993
Management & Fundraising	<u>\$1,177,763</u>
	\$4,012,757
Change in net assets	\$217,857

STATEMENT OF FINANCIAL POSITION

ASSETS

Cash	\$2,733,453
Pledges/Receivable	\$287,372
Grants receivable	\$365,477
Other	<u>\$19,198</u>
	\$3,405,500
Property and equipment, net	\$6,152,471
Beneficial interest in assets held by others	<u>\$1,289,225</u>
	\$10,847,196

LIABILITIES & NET ASSETS

Accounts payable	\$128,090
Grants payable	\$200,000
Accrued expenses	\$112,548
Designated pledges payable	\$13,400
Deposits	\$26,887
Deferred revenue	\$63,980
Long-term debt	<u>\$2,548,605</u>
	\$3,093,510
TOTAL LIABILITIES	\$3,093,510
TOTAL NET ASSETS	\$7,753,686
TOTAL LIABILITY & NET ASSETS	\$10,847,196

BOARD

OFFICERS

Warren Hoy

Chair

Shyam Kamath

Vice Chair, Community Investments

Monica Tovar

Vice Chair, Resource Development

Fana Oldfield

Treasurer

Ann Kern

Secretary

BOARD MEMBERS

Daniel Chibaya**Glenna Datta****Alexis Garcia-Arrazola****Carmen Gil****Juana Gomez****Brayton Johnson****Stefan Lorch****Jordan Pratt-Thatcher****Shannan Watkins****\$380,000 IN GRANTS****Grants provided to following partners:**

Center for Community Advocacy

Central Coast Energy Services

Community Bridges

Door to Hope

Hartnell College Foundation | Bright Futures

Mujeres en Acción