

ED SCHOOL DIS

**ANSWERING**



**YOUR CALL**

**2023 ANNUAL REPORT**

United Way  
Monterey County



## Letter from Our President and CEO

### This past fiscal year contained many milestones for UWMC:

Our first year owning the Community Impact Center; the first year uniting our two offices into one in the heart of Salinas City Center; and our first year relaxing masking requirements since the start of the pandemic. As we continued to offer and adapt many of our core services, such as VITA and 211, we added other programs and services in response to community needs. In collaboration with the Visiting Nurses Association and the Community Health Workers through the Community Foundation for Monterey County, we were able to provide COVID-19 vaccinations in the fall and winter, reaching out to the most vulnerable communities to make it easier for people to maintain defenses against COVID-19.

Just as we thought we were winding down other forms of pandemic relief, such as rental assistance, we were granted the opportunity through the US Department of Agriculture and our state association, United Ways of California, to distribute financial assistance to farmworkers as part of an extended COVID relief program. Our collaborative work continued with the publication of the Community Health Needs Assessment, the development of referral infrastructure for mental health and substance use disorder providers, and support for the winter storm relief.

Monterey County is a special place because of the collaboration, inclusion, and belonging we feel individually and as an organization. We are honored to play a significant role in the community and are pleased to share a few of last year's highlights with you.



**Katy Castagna**  
*President and CEO*  
United Way Monterey County

## OUR MISSION

Engage the community and focus resources to improve lives in Monterey County.

## OUR VISION

A caring and connected community where everyone has an opportunity to succeed.



## Answering Your Call

Since its inception, United Way Monterey County (UWMC) has focused on fulfilling our promise to be here for our community. Over the past year, the needs of our community changed and evolved and UWMC made sure our initiatives reflected these needs. While strengthening existing programs, UWMC was activated to provide support during the Winter Storms, the Pajaro Flood, and for continued Pandemic Relief efforts. No matter what, UWMC is here for you, for your family, and for our community. We are here to Answer Your Call.

# Circle of Impact



# Our 2023 Focus Areas



**Asset Building**



**Early Care and Education**



**Housing**



**211/Resource and Referral**







## Asset Building

### Volunteer Income Tax Assistance

UWMC's Volunteer Income Tax Assistance (VITA) program offers free tax preparation services to low-to-moderate income residents to ensure that they obtain all the tax credits and refunds they are due. UWMC has been offering the VITA service to Monterey County since 2009. VITA relies on community volunteers who are trained and certified in tax preparation. These volunteers lend their services to tax sites around the county throughout tax season, helping thousands of residents and gaining important life skills.



**1,038 tax returns filed**



**\$1,898,197 in refunds**



### Prosperity Planners

UWMC supports Prosperity Planners through a grant to Goodwill Central Coast. Prosperity Planners help people change their behavior toward long-term planning through one-on-one coaching and work experience. This program supports residents experiencing financial instability and helps them achieve long-term goals such as creating a stable budget, increasing savings, and improving education and career opportunities.



**Success Story from Prosperity Platform client:**  
*"I am beyond thankful for the opportunities that the Planner has provided and assisted me with. Any time I have questions or concerns the planner provides information or seeks outside resources to help me progress towards my goals. I am more confident as a mother, employee, and individual."*



UWMC offered **57 Financial Literacy Education Workshops** in Spanish and English.



**924 participants demonstrated improved financial literacy knowledge, skills, and abilities.**

### Financial Literacy Education

UWMC's Financial Literacy Education workshops benefit those earning below the federal poverty level. These workshops, offered in Spanish and English, help individuals learn how to make informed financial decisions and feel confident in money management.

The workshop curriculum teaches participants how to set financial and career goals, manage a budget, understand and repair credit, and inform them about available child care and subsidy programs. These workshops also raise awareness about UWMC's VITA free tax preparation service and the 211 resource and referral helpline.

### CalWORKs

California Work Opportunity and Responsibility to Kids (CalWORKs) is a public assistance program that provides cash aid and services to eligible families. In partnership with the Monterey County Department of Social Services, United Way matches clients with community service positions to build job skills, references, and make connections.



**Success Story from MEarth:**  
*"MEarth was first contacted by a United Way Case Worker to inform us a client was interested in volunteering in our garden. Our team was excited for the opportunity to expand our team. After only a week, we knew we had made a great decision. The person who joined us had great previous experience, was dedicated and focused to the work, and was enthusiastic about being at MEarth on a regular basis. We knew we wanted to keep her on the team for longer. We wholeheartedly hope to continue supporting additional members of the community as well as fill a growing need for support at our worksite."*

**112 individuals received referrals for Job Site Training and Case Management support.**





## Early Care and Education

### Monterey County Preschool Service Corps



The goal of the Preschool Service Corps (PSC) is to help children reach age level proficiency and support kindergarten readiness. AmeriCorps members are recruited and trained by United Way to serve in preschool classrooms and provide students who are reading under age level with individualized tutoring during their regular school day.



### Family, Friends, & Neighbors

There is a large gap between the number of children ages 0-5 and the number of licensed childcare providers in Monterey County. Consequently, a significant portion of children are receiving care from non-licensed caregivers, usually embodied by their Families, Friends, and Neighbors (FFNs). This program focuses on providing these early childhood educators with the resources and training necessary to provide children with an engaging and safe environment that stimulates development and encourages readiness for school.

**This year, 72 FFNs**



**Provided quality care for 128 children**



**Attended 118 playgroups, workshops, and reflective groups**

*“I learned more about child development, the stages of growth, and how important the first five years of a child’s life are.”*

*Joba Mendez, FFN Provider*



**In the 2022-23 academic year, the program served 104 children at 11 partnering sites.**

## Housing Solutions

The high cost of housing poses a significant challenge for families in Monterey County, as 41% of all households in the county spend more than 30% of their income on housing-related expenses. In Monterey County, an individual needs to work almost three times the state minimum wage to afford the average monthly rent. Housing costs drive up the prices of everything else in Monterey County as service providers of child care, goods, and services build these housing costs into their prices. Expensive housing can also result in long commutes, traffic, or overcrowding in homes.

### Emergency Rental & Utility Assistance Program

UWMC continued working with the Department of Social Services to operate the Emergency Rent and Utility Assistance Program (ERAP) to address the need for help for those affected by COVID-19. UWMC collaborated with community partners to disburse State and Federal funding.

### Housing Stability Program

There is a significant need for housing stability in Monterey County as many families are relatively financially stable but struggle to overcome the burden of transitioning to a new home or stepping out of homelessness. To address this need, ERAP funding was provided to 5 agencies who are providing housing navigation assistance, case management, and financial support for obtaining permanent housing, serving 164 families this year.



**This year, \$6,632,479 of assistance was distributed to Monterey County households.**



## Stuff the Bus

**Stuff the Bus** is a countywide drive to provide new school supplies and backpacks for children who live in homeless or near homeless conditions. In 2023, more than 11,395 students were identified as homeless throughout Monterey County.

**Stuff the Bus** eases the financial burden on families, promotes learning, encourages self-esteem, and motivates students to stay in school.

## 211 Monterey County



### 211 Monterey County

211 Monterey County is the comprehensive information and referral service for Monterey County. 211 connects Monterey County callers and texters with information about health and human services available to them. Services are available 24/7 in over 220 languages. During times of disaster, 211 provides incident-specific information in coordination with local emergency services, including road closures and shelters both locally and nationwide.

**15,516**  
CALLS or TEXTS

**36,128**  
WEBSITE VISITS

**21,481**  
REFERRALS MADE

### Winter Storms

During the response and recovery from the winter storms, 211 played a pivotal role in connecting residents with essential information and resources related to the storm. This involved active participation in our county's Emergency Operations Center, where 211 shared crucial, real-time updates on evacuation warnings/orders, road closures, shelter locations, resource distribution efforts, and details about the Local Assistance Centers.

### 211 Sponsors

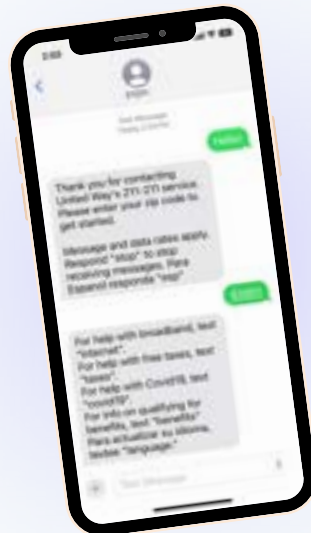
- City of Carmel-by-the-Sea
- City of Del Rey Oaks
- City of Gonzales
- City of Greenfield
- City of Marina
- City of Monterey
- City of Pacific Grove
- City of Salinas
- City of Soledad
- Community Foundation for Monterey County
- County of Monterey
- Harden Foundation
- Kaiser Foundation
- Monterey Peninsula Foundation
- Pacific Gas & Electric Company
- Salinas Valley Health

### Affordable Broadband

In partnership with United Ways of California, 211 screened and connected residents to UWCA's Broadband Initiative for low-cost internet and information about the Affordable Connectivity Program.

### USDA Food and Farmworker Relief

UWMC partnered with United Ways of California to support food and farmworkers with direct financial assistance. Nearly \$250,000 was awarded to qualified community members through \$600 cash cards.



## Smart Referral Network



This year, with a total of 72 active partners, 1,694 individuals received referrals from the SRN.

The Smart Referral Network (SRN) is a collaboration of community benefit organizations who coordinate services to help people access services, reach financial stability, and improve well-being.

*"If there's a bed available in a program that my patient's eligible for, but we don't know it, we can't get that patient connected to care. And so that's where we're working right now [with The Hope & Help Program]. In real-time, we're able to find what that patient needs and get them connected to the services that are available."*

Dr. Reb Close  
Emergency Physician & Addiction Medicine Specialist  
Montage Health

## The Hope & Help Program

UWMC launched the Hope & Help Program in 2022 to address the rising need for mental health and substance use disorder services. The goal of the program is to give residents experiencing mental health distress and substance use disorders the tools they need to achieve emotional and physical well-being. This is accomplished by improving access to mental health services, addiction treatments, and essential support services. The program achieves this by creating a collaborative, bi-directional smart referral network of service providers.

Residents can access personalized services through 211 and the Smart Referral Network, which enables "closed loop" referrals. Case Managers, frontline workers, and residents in need of services utilize the program to identify necessary services in the County 211 health and human service database and efficiently enroll in them.



## Texting Campaign for Behavioral Health

In 2022, the Hope & Help Program launched a text campaign to help residents access resources for mental health and substance abuse disorder support. UWMC partnered with community organizations to ensure the information reached those in need.

To access the texting program, residents can text the following keywords to (831) 215-3342.



**CARE** for substance use resources



**HOPE** for suicide prevention



**WELLBEING** for mental health resources



**YOUTH** for youth resources





## Community Engagement

### 47th Annual LIVE UNITED Awards

Hosted by KION Chief Meteorologist Dann Cianca, this year's LIVE UNITED Awards celebrated the hard work of over 35 volunteers.



## Special Initiatives and Groups

### Everyone's a Teacher

In partnership with UWMC, KION Anchorwoman Veronica Macias hosted a 10-week segment called *Everyone's a Teacher*. Each week, she visited a different preschool in Monterey County, read to students, and interviewed UWMC partners and members of the community. Macias herself struggled with an inadequate literacy education in her youth and is passionate about ensuring children receive the guidance and mentorship necessary to promote healthy reading habits.

### Emerging Leaders Society

UWMC's Emerging Leaders Society (ELS) is back in full swing. This year, ELS expanded membership and developed a regular schedule of fundraisers, networking events, and volunteer opportunities.



### MLK, Jr. Day

In honor of MLK, Jr. Day of Service, UWMC hosted a book drive which generated 150 brand new books for local preschools.



### 24th Annual Community Breakfast

Emceed by News Anchor for KSBW Action News 8, Dan Green, our closest partners and supporters joined us for an up close look at how UWMC has answered your call with a special focus on Housing initiatives, expanding the substance use disorder and mental health network, and assisting during the winter storms and other crises.

### Read Across America

To celebrate Dr. Seuss Day, 26 volunteers spread the love of books by reading to 22 preschool and kindergarten classrooms throughout the county.

### Preschool Spruce Up

Preschool Service Corps members and community volunteers joined to spruce up local preschool play areas. Their work helps create a welcoming environment and ensures that early learning environments are well equipped to stimulate social, emotional, and academic development of our youngest learners.

**This year, over 35 volunteers spruced up the play areas of the MPC Early Childhood Education Lab School, which hosts a total of 67 preschool students.**



### UWMC Community Impact Center

Since acquiring the building in 2022, the UWMC Community Impact Center has made headway as a resource for local nonprofits and like-minded community groups. The Community Impact Center was created to foster space for nonprofits in our community to utilize and advance their missions. In its first year, the Community Impact Center welcomed 15 nonprofits and community organizations totaling nearly 1,000 guests for trainings, workshops, and more.





## 2022-23 Board Members

### Executive Committee

**Sandi Eason**  
*Chair*  
Pacific Valley Bank

**Jacob Martinez**  
*Vice Chair of Community Investments*  
Digital NEST

**Monica Tovar**  
*Vice Chair of Resource Development*  
TMD Creative

**Steve Emerson**  
*Treasurer*  
First Pacific  
Financial Services

**Deborah Sober**  
*Secretary*  
CHOMP

### Board Members

**Warren Hoy**  
Catholic Diocese of Monterey

**Shyam Kamath**  
Community Volunteer

**Katherine Kantardijieff**  
CSU Monterey Bay

**Ann Kern**  
Community Volunteer

**Stefan Lorch**  
Monterey Marriott

**René Mendez**  
City of Watsonville

**Fana Oldfield**  
Community Volunteer

**Juan P. Rodriguez**  
County of Monterey

**Shannan Watkins**  
Early Development  
Services

## 2022-23 Funded Partners

- Boys and Girls Club of Monterey County
- California Rural Legal Assistance
- Center for Community Advocacy
- Central Coast VNA
- City of Greenfield
- King City
- City of Salinas
- City of Seaside
- City of Soledad
- Community Action Partnership of San Luis Obispo County
- Community Bridges
- Community Emergency Response Volunteers
- Community Foundation for Monterey County/Community Health Workers support
- Community Human Services
- Door to Hope
- Gathering for Women
- Goodwill Central Coast
- Hartnell College Foundation
- Housing Resource Center
- Monterey County Office of Education
- Monterey Peninsula College
- Mujeres en Acción
- Pajaro Valley Prevention & Student Assistance
- Salvation Army Salinas Corps

## Community Reports

### Real Cost Measure

The Real Cost Measure, a report by United Ways of California, reveals that millions of California households struggle to cover basic expenses. Over 40,000 of these households are in Monterey County, with nearly 50% in Salinas. Data from this report helps UWMC shape programs to address needs specific to Monterey County and supports our reasoning for promoting financial stability. Scan the QR code below to view the report.



### Impact Monterey County

The Impact Monterey County (IMC) Report provides high-level insights for local nonprofits, government, and funders into where energy and desires for change exist within the community. The report highlights community perspectives on solving certain issues and how agencies and community members can address these challenges. Scan the QR code below to view the report.



### Community Health Needs Assessment

The Community Health Needs Assessment (CHNA) highlights known health needs in the community, such as diabetes, nutrition, and heart disease. The report also demonstrates the need to address access to care issues and calls to attention the need for resources and increased awareness around behavioral health and substance use. The report is conducted by the Monterey County Health Needs Collaborative, which is a group of organizations dedicated to improving the health of the Monterey County community. The partnership includes the Community Hospital of the Monterey Peninsula, Salinas Valley Memorial Healthcare System, Mee Memorial Healthcare System, Natividad, the County of Monterey Health Department, and United Way Monterey County.





## 2023 Financials

### STATEMENT OF ACTIVITIES

#### Public Support and Revenue

Pledges, net	\$1,316,619
Grants and contractual agreements	\$10,314,928
Other Support and revenue	\$1,042,250
	<u>\$12,673,797</u>

#### Expenses

Community investments and designations, net	\$8,643,550
Community Services	\$2,459,746
Management, general, & fundraising	\$1,334,674
<b>TOTAL EXPENSES</b>	<u><b>\$12,437,970</b></u>

<b>Change in net assets before investment return</b>	<b>\$235,827</b>
Investment income (loss)	\$107,830
<b>Change in net after investment return</b>	<u><u><b>\$343,657</b></u></u>

#### Footnotes:

\* Includes donated advertising in the amount of \$468,656

### STATEMENT OF FINANCIAL POSITION

#### Assets

Cash and cash equivalents	\$3,033,013
Pledges receivable, less allowance	\$384,003
Grants and accounts receivable	\$1,404,981
Other current assets	\$37,195
	<u>\$4,859,192</u>
Property and equipment, net	\$6,187,483
Beneficial interest in assets held by others	\$1,052,484
Other nonconcurrent assets	--
	<u><u>\$12,099,159</u></u>

#### Liabilities & Net Assets

Accounts payable	\$91,020
Grants payable	\$1,124,704
Accrued expenses & other liabilities	\$186,672
Refundable advance	\$316,478
Long-term debt	\$2,922,507
	<u>\$4,641,381</u>
<b>TOTAL NET ASSETS</b>	<u><u><b>\$7,457,778</b></u></u>
	<u><u><b>\$12,099,159</b></u></u>

## Our Donors



The impact UWMC makes in our community is only possible because of our supporters. Thank you to all of our donors who are dedicated to improving lives in Monterey County. Scan the QR code above to see a list of all of our donors for 2022-2023.