

UNITED FOR CHANGE

ANNUAL REPORT
2022/2023



**United Way of
San Luis Obispo County**



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The Real Cost of Living in San Luis Obispo County

31%

of SLO County residents do not earn sufficient income to meet basic needs

\$98,196

Average annual budget for a four-person household to make ends meet in SLO County

71%

of single mothers in SLO County are below the Real Cost Measure

LETTER FROM OUR BOARD CHAIR

Dear Neighbor,

I'm proud to call SLO County my home, and I'm privileged to serve on the board of an organization that brings our community together to address the issues that make us stronger.

2023 has been an exciting year of transition for United Way San Luis Obispo County! After the retirement of our longtime CEO, our local board of directors has taken the time to evaluate our impact in the community and examine the community priorities we're tackling. The SLO county neighbors we meet each day in our work teach us a lot about the current needs in our community, and we modify our services to meet those needs better. This year's analysis has strengthened the work we do and positioned us to be a positive force moving into the future.

Our work is centered on three impact areas that give people the best start for a successful life: Early Childhood Education, Family Financial Stability and Community Strengthening. You will see these 3 areas framing our work in our communications and on the new website which will debut soon.

We encourage you also to find a volunteer opportunity in one of these areas. Whether you'd like to volunteer in a group, alone or from your home, using your mind or your hands, we have the opportunities for you at www.unitedwayslo.org/volunteer!

We invite you to join our work financially. While we live in a beautiful place with many advantages, these benefits come with a cost. In SLO County, 31% of our neighbors earn less than it takes to meet the cost of living here. United Way's biannual Real Cost Measure tells us that 90% of those folks are working at least one job. Our programs deliver the education and resources that can help families succeed, in the present and for the next generation.

Please join me! Together we can do our part to make a stronger community in SLO County that benefits us all!

With appreciation,



Trish Avery-Caldwell
Board Chair



OUR MISSION

To foster structural change by addressing root causes in order to safeguard the future of our community.

OUR VISION

A strong, healthy, compassionate community that gives youth the foundation to thrive and succeed.

OUR FOCUS

United Way of San Luis Obispo County has been an active member of our community since 1958. We focus our efforts on three impact areas: Early Childhood Education, Family Financial Stability, and Community Strengthening. Through our work, we strive to improve the standard of living for each person in SLO County.



EARLY CHILDHOOD EDUCATION

The first five years are the most critical for brain development and set the path that will determine a child's success. Our programs provide parenting advice, model parent-child communication and build vocabulary through exposure to books. Kids with books can have twice the vocabulary when they start school, setting a course for success.



FAMILY FINANCIAL STABILITY

Because the money habits children establish by age eight will follow them through life, our financial literacy classes for kids are essential. Our tax preparation assistance returns a half million dollars in tax refunds each year to our local economy.



COMMUNITY STRENGTHENING

Supporting United Way maintains the VolunteerSLO platform, matching community needs with volunteers year-round. Our 2-1-1 helpline provides access to vital support for people unsure of where to turn. We also lead a critical collaborative of nonprofits who respond with the government when disasters strike.

EARLY CHILDHOOD EDUCATION



The first five years of a child's life are pivotal for brain development. Investing in this early stage can mitigate the need for costly remedial interventions later. To support this crucial phase, we provide a range of resources and programs. We offer financial literacy courses for children in grades 1-3 to establish healthy financial habits early on. By enrolling children in the Imagination Library, we initiate a lifelong journey of reading and learning for kids and their parents, starting from birth and continuing until they reach the age of five. Parents can also receive valuable tips through our text subscription service, enhancing their parenting skills. Additionally, we've established Born Learning Trails across the county, offering interactive and engaging learning experiences for both children and parents.

Our Impact Over the Last Year



5,556

Books received by children under 5 in SLO County



\$88

Matching funds available to each child after they complete financial literacy classes



5

School districts received school supplies for kids in need



Literacy 2.0

An early education initiative that combines financial literacy courses designed for young kids along with a custodial savings account and matching funds.



Imagination Library

Developed in 1996 by singer Dolly Parton, this early learning program puts a new, age-appropriate book every month in the hands of kids from birth through 5 years of age.



Born Learning Trails

Signposted trails in area parks providing a fun and interactive experience for caregivers and children that turn everyday activities into learning moments.



Stuff the Bus

An annual back-to-school drive to collect and deliver school supplies to students in need. This helps boost their self-esteem while encouraging them to stay in school.

FAMILY FINANCIAL STABILITY



Financial stability is a significant indicator of future success. Recognizing this, United Way of San Luis Obispo County conducts seminars for unbanked populations in the county, focusing on essential topics like savings, debt reduction, and credit building. Complementing these efforts, our free tax preparation service aids numerous individuals in preparing their basic tax returns, ensuring they take full advantage of benefits such as the Earned Income Tax Credit and Child Tax Credits. This holistic approach helps lay the groundwork for financial well-being in the community.

Our Impact Over the Last Year



485

Tax returns UWSLOC helped file this year



\$429K

Returned to our local economy in tax refunds we helped file



\$1.26M

Injected in local economy through COVID relief payments for area farm workers



MyFreeTaxes.org

A service offered both in-person and remotely to help hard-working, low-income residents claim available tax credits and file their federal and state tax returns for free.



Money Talks

A 5-week, hands-on experience that teaches residents how to create a personal budget, manage credit scores, develop goal setting strategies, and make good financial decisions.



VITA Tax Assistance

Provides free basic tax return preparation for low- and moderate-income taxpayers with the help of IRS-certified volunteers.



“I am beyond grateful to have access to a tax preparation service that does their homework. United Way changed my life tremendously. As a single-parent, I can’t thank you enough!”

—Alisha, Tax assistance client

COMMUNITY STRENGTHENING



United Way of San Luis Obispo County is at the forefront of a collaborative network comprising private and non-profit entities poised to respond swiftly in times of disaster, complementing the efforts of county government responders. The organization upholds a 2-1-1 helpline, staffed by live expert resource specialists, to assist those uncertain of where to find help. This helpline taps into a comprehensive database of services, including both non-profit and government offerings. Additionally, UWSLOC's Youth Board program empowers high school students with practical community engagement experiences, educating them about community services and fostering a commitment to volunteerism.

Our Impact Over the Last Year



9,000+

Calls, texts, and clicks to our 211 helpline



6,563

Residents use our volunteer matching website to find volunteer opportunities



30

Volunteer organizations active in disaster relief coordinated by UWSLOC



211 Helpline

211 is an easy to remember number for free information and referral to health and human service programs via phone, text messaging, and an online tool.



Youth Board

A unique volunteer experience that gives high school seniors the opportunity to make a direct impact on their peers by addressing the needs of their community.



KYXZ 107.9 FM

Community radio that fosters cultural diversity, cross-generational respect, and supports the arts, community events, community services and organizations.



VOAD

Voluntary Organizations Active in Disaster (VOAD) promotes collaboration among community organizations, faith-based groups, and government agencies to help people affected by disasters.



A SURPRISING CATALYST FOR CHANGE

Discovering New Opportunities to Support Food and Farm Workers in San Luis Obispo County

In 2023, UWSLOC began administering a program for the U.S. Dept. of Agriculture which provides COVID relief payments for food and farm workers in SLO County. We have the opportunity to meet one-on-one with each of the 4,000 applicants as we enroll them.

In addition to injecting \$2.8 million into our local economy, this program has had another tremendous positive benefit. The personal contact required by the program's enrollment process has allowed us to hear directly from a significant segment of our county's population that is often hidden and without a voice.

Food and farm workers are an important part of the SLO County economy. Our agriculture businesses rely on them, our local retail businesses benefit from their patronage, and they are involved across our social spectrum from education to religion.

We have learned valuable information about how our social services network functions across SLO County and the steps we can take to improve and expand services.

Here's a sampling of learnings and actions to date:

- Food and Farm Workers are frequently unaware of the extent of services available to them.
- When there is awareness of services, families can feel uncomfortable coming forward and utilizing programs.
- Better collaboration between community impact organizations and government agencies can help connect people with the broad range of services our community offers.
- UWSLOC partners with organizations and shares information for many programs available to this population, such as CAPSLO, SLO County Undo-cuSupport, EDD, Crisis Support Services, and more.
- When UWSLOC goes into the field (sometimes literally!) to meet with farm workers, partner organizations often accompany us to provide their services as well.
- UWSLOC will soon debut a set of financial literacy seminars for farm workers based on feedback we received.

SLO County has a valuable resource in our food and farm worker neighbors. As they contribute to our economy, they also teach us how we can be increasingly responsive to all the people who make our county a successful place to live and work!



2022-2023 FINANCIALS

Full financial data is available at: unitedwayslo.org/financials

BOARD OF DIRECTORS



Trish Avery-Caldwell
Chair

County of San Luis Obispo –
Dept. of Social Services (Retired)



Carlesha Harris
Mission College Prep

Mission College Prep



Jennifer Cusack
Ombuds

Balance Treatment Center



Michael Hicks
Treasurer

Hicks Pension Services



Nicholas Drews

County of San Luis Obispo Health Agency



Natasha Mercurio
Secretary

Richardson Properties



Zoe Elliott
Youth Board President



Christy Mulkerin, MD
Healthcare Consultant

Healthcare Consultant



Jeff Hamm
Past Chair

County of San Luis Obispo Health Agency
(Retired)

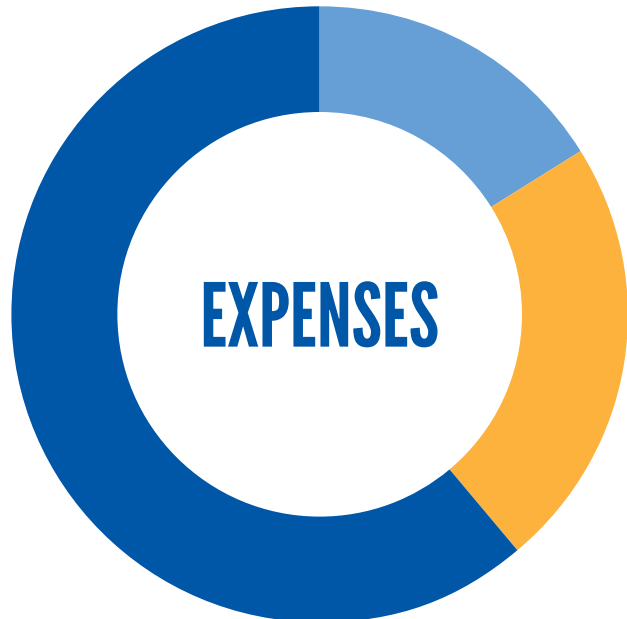


Cliff Stepp
Vice Chair of Marketing

SteppUp Consulting



- 64% Individual Giving
- 14% Corporate Giving
- 13% Grants
- 9% Other



- 62% Grants to Community Programs
- 23% United Way Community Programs
- 16% Operations



CONTRIBUTORS

JULY 2022 – JUNE 2023

TOQUEVILLE \$10,000+

Jennifer & Carrie Cusack
Bert & Candace Forbes
William Frost
Anonymous

CERRO ALTO \$5,000+

Patricia Avery-Caldwell
Rich & Hilde Minkel
Anonymous

HOLLISTER PEAK \$2,500+

Bob & Debby Alberti
David & Sandra Buck-Moyer
Michael Hicks
Joseph Mercardante
Henry Myers
Jose Martinez Alvarez
Anonymous

MORRO ROCK \$1,000+

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Stuart & Arlene Atkins
JD Armstrong
Jeffrey & Ashlee Brown
Judith Colglazier
Gerald Clare
Penny Borenstein
Laurent & Azita Bernad
Geoffrey Halpin Tree
Jeff & Joannie Hamm
John Hofschroer
Andrew & Jeanne Greensfelder
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Josh Krebs
Rick London
Robert & Laurie Neumann
Ian Parkinson
William Safarjan Ph.D.
Edward Stettler
Timothy Onello
Anonymous

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Karen Wiley
Robert & Nancy Wilkinson
Linda Wingert
Dorothy A. Wirth
Anonymous

CORPORATE CONTRIBUTORS

JULY 2022 – JUNE 2023

1st Capital Bank
 Alfano Motors
 Altrusa International Foundation San Luis Obispo County, Inc.
 American General Media
 American Legion Post 432
 American Riviera Bank
 Automobile Club of Southern California
 Balance Treatment Center
 Blaze Pizza
 Bottom Line Bookkeeping & Tax Preparation
 BTC HEG, Inc.
 Bunyon Bros. Tree Care, Inc.
 Caltrans District 5
 Carol & Warren Sinsheimer Foundation, Inc.
 Caterpillar Inc.
 Chipotle Mexican Grill
 City of Paso de Robles
 City of Pismo Beach
 City of San Luis Obispo
 Coast BMW-Nissan
 Coastal Pediatric Dentistry
 Costco of San Luis Obispo
 County of San Luis Obispo
 County of San Luis Obispo Sheriff's Office
 Covelop Inc.
 Creekside Community
 Cuesta College
 Cullen-Hirsch Family Legacy Fund
 Delta Airlines c/o United Way of Greater Atlanta
 Digital West Networks Astound Business Solutions
 Dimes Media Central Coast
 Duke Energy Corporation
 Eli Lilly Sales Force c/o United Way of Central Indiana
 Enterprise/Taylor Charitable Entities
 Eventbrite Inc.
 FedEx Express
 Five Cities Plumbing, Inc DBA Morro Bay Plumbing
 Fluor Corp.
 Foster and Foster Incorporated
 French Hospital Medical Center Dignity Health
 Idler's Home
 ITW Global Tire Repair / Illinois Tool Works
 Ivernia, Inc. (DBA McDonald's)
 JC Penney #2755 – Paso Robles
 Kon Tiki Inn
 KPMG c/o Bergen County's United Way
 KSBY
 La Chance Charitable Fund
 Lindsey Harn Group, Inc.
 Loan Depot
 Lucia Mar Unified School District
 Madonna Inn Enterprises
 Management Information Control Systems

Marc Amesse Insurance and Fin Services, Inc.
 Meathead Movers
 Mechanics Bank
 Microsoft Donation Program
 MindBody, Inc.
 Miners Ace Hardware
 Murphy Bank
 Nationwide Insurance Enterprise
 New Times
 Pacific Gas and Electric Company
 Pacific Western Bank San Luis Obispo
 Paso Robles Joint Unified School District
 Payless ShoeSource c/o United Way of Greater Topeka
 PCL Construction, Inc.
 R. J. Weyhrich Charitable Trust
 REIS Family Mortuary & Crematory
 Rockwell Sales Office c/o United Way of Greater Milwaukee
 Rogers Jewelry Co.
 RRM Design Group
 San Luis Coastal Unified School District
 San Luis Obispo Sheriff Association
 SDSA Sworn Deputy Sheriff's Association
 SeaCrest OceanFront Hotel
 Semmes & Co. Builders, Inc.
 SESLOC Federal Credit Union
 Sharkey Foundation (Michael Wolfe)
 Sierra Vista Regional Medical Center Tenet California
 SLO Credit Union
 Specialty Construction, Inc.
 Specialty Gear & Transmission Service Inc.
 Stephen K. Hall & Associates
 Stepp Up Consulting
 Suez WTS
 Sunset Honda
 Superior Courts of California
 Susan Polk Insurance
 Target Store #2759 – San Luis Obispo
 Temple Ner Shalom
 The Modafferi Charitable Fund
 The Niner Foundation
 UHG
 United Way Worldwide
 United Ways of California
 UPS
 US Bank
 UU Community of Cambria
 Verdin Marketing Ink Co.
 Wallace Group
 Walmart #2556 – Arroyo Grande
 Whacker Wealth
 Woodstock's Pizza
 Zurn Elkay Water Solutions

WORKPLACE GIVING

Thank you to the generous employees who contributed through workplace campaigns!

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 Balance Treatment Center
 Caterpillar, Inc.
 Charter Communications
 City of Paso de Robles
 City of San Luis Obispo
 Costco of San Luis Obispo
 County of San Luis Obispo Sheriff's Office
 Cuesta College
 Delta Airlines
 Duke Energy Corporation
 Eli Lilly Sales Force
 Enterprise Rent-A-Car

Farm Supply Co.
 FedEx Express
 Fluor Corp.
 ITW Global Tire Repair / Illinois Tool Works
 JC Penney Store – Paso Robles
 KPMG
 Lucia Mar Unified School District
 Microsoft Donation Program
 MindBody, Inc.
 Motorola Solutions
 Nationwide Insurance Enterprise
 PCL Construction, Inc.
 Pacific Western Bank San Luis Obispo
 Paso Robles Joint Unified School District

Payless ShoeSource
 Promega BioSciences
 Rockwell
 SLO Superior Court
 San Luis Coastal Unified School District
 Suez WTS
 Susan Polk Insurance
 TD Ameritrade
 Target
 UHG
 UPS
 US Bank
 Verdin Marketing Ink Co.
 Walmart
 Zurn



County Supervisor Dawn Ortiz-Legg presents a Resolution from the Board of Supervisors recognizing the generosity of ITW Global Tire Repair.



ITW Global Tire Repair and Employees
 Celebrated \$1,000,000 in Contributions Since 2010



GIVE TODAY!



United Way of San Luis Obispo County

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