

DAN DONATES \$10 TO
HELP FIGHT POVERTY

JESSICA MEETS WITH
LAWMAKERS TO ADVOCATE
FOR 211 FUNDING

MONA GIVES MOCK INTERVIEWS TO
STUDENTS PREPARING TO ENTER
THE WORKFORCE

80,000 TAX RETURNS
FILED FOR LOW-INCOME
FAMILIES

14 SPARKPOINT LOCATIONS
PROVIDING FREE FINANCIAL
COACHING

A YEAR IN MOMENTS

2015 - 2016



UNITED WAY BAY AREA

Annual Report



DEAR FRIENDS,



DEC, 2015
BEGAN COMBINING 2
UNITED WAYS FOR A
BIGGER BAY AREA IMPACT

Poverty is complicated. There are multiple ways to define it and many factors that contribute to it. And it's easy to think of it as a problem that is too big, too systemic, too overwhelming to solve. Fighting poverty can seem like an uphill battle.

But it's not. Poverty is a solvable issue. The solution is not an easy one, and it requires a wide variety of data-driven approaches, an army of caring service providers and volunteers, partners in every sector of the community, and a relentless drive to keep at it every single day. These are United Way Bay Area's strengths, and as you'll see in the results within this report, we are succeeding because of the thousands of people who invest in our work with their time and resources.

You may have seen our Make Your Moment campaign this year where we highlighted ways that every individual can make an impact on the larger community. By an hour of volunteering, a \$10 donation, a call to your Senator's office, all of these seemingly small, singular acts have enormous collective impact when we're all in it together. This is how community improvement happens. This is how the progress in this annual report is made—person by person, moment by moment.

While much of the impact of our work is expressed in numbers, remember that these numbers are people. They have stories, struggles, hopes, and like all of us at times, they needed a helping hand that we were able to provide thanks to you. You will meet some of them throughout this report.

It was a busy year full of successes, new opportunities, and some challenges that relied heavily on our spirit of innovation and tenacity. We learned quite a bit this year, and we have given you a sense of the vision ahead that is informed by those learnings. I hope that you are as inspired as we are about what is ahead because when we are all in, each of us making moments for others to succeed, poverty doesn't stand a chance.

On behalf of the tens of thousands we serve, thank you for your support of United Way Bay Area, and I hope that you take enormous pride in what we have accomplished together. Let's continue making moments that benefit our entire community in the coming year.

Warmly,

Anne Wilson



IN FISCAL YEAR 2016

United Way Bay Area inspired 40,170 local people to donate \$33,965,515 in support of 1,550 nonprofits as well as our own work in ending the cycle of poverty in the Bay Area.

While some donors choose to designate their gifts to specific agencies, gifts directly to United Way Bay Area allow us to invest in initiatives and partner with agencies that work to end the cycle of poverty from multiple angles so that all Bay Area residents have the opportunity to prosper and thrive — wherever they are in their life. Last year, these gifts directly impacted lives in the following ways:

FREE FINANCIAL COACHING
ALLOWS HENRY TO SAVE FOR
HIS SON'S COLLEGE FUND

Empowering Adults & Improving Our Economy

- **5,686** people received financial and career coaching at **13 SPARKPOINT CENTERS** putting them on individualized paths to better care for themselves and their families.
- **80,970** tax returns were filed by over 3,000 trained volunteers for low- to middle-income families through **200+** Earn It! Keep It! Save It! sites, putting more than **\$83 MILLION** back into the local economy.

Inspiring Youth & Mobilizing Employers

- Through programs like Mayor's Youth Jobs+ we connected **6,365 YOUTH** (primarily from low-income families) to career-track jobs and internships with **61 BAY AREA COMPANIES**.
- **122 MAYOR'S YOUTH JOBS+ PARTNERS** placed youth in jobs, conducted resume reviews and mock interviews, and served as a resource for youth at career exploration events.

Providing Support in Moments of Crisis

- **191,627 CALLS ANSWERED** through 211 to connect those in need of vital services, like food and shelter.
- **575 FAMILIES** in the Bay Area received hardship assistance with housing, health, utilities, and job access issues through the Labor-United Way partnership.
- **1.5 MILLION MEALS, 70,000 BED NIGHTS OF SHELTER,** and **244 RENT BILLS** provided for Bay Area residents through the Emergency Food and Shelter Program's distribution of federal and state funds to social services programs.

CAMILA SparkPoint Beneficiary

Camila is a single parent whose journey to financial success began when a United Way SparkPoint center helped her access childcare services for her seven children so she could focus on her job search. Seeing all the services available to her, Camila utilized multiple programs with various agencies. She says that no one believed in her to the degree that the SparkPoint center staff did. Before, Camila had never made more than minimum wage. Now, after receiving SparkPoint services, she's on a path to a career as a carpenter and making enough to fully support her family.



I went from a minimum wage paying job to received child care. SparkPoint was so I've accomplished without this program.



making double what I was being paid before and I also helpful to me... I wouldn't be able to accomplish what

”



MERGED IN 2016:

On June 30, 2016, United Way of the Bay Area and United Way Silicon Valley officially announced a merger to form United Way Bay Area (UWBA), committed to improving lives and strengthening communities across eight Bay Area counties—Alameda, Contra Costa, Marin, Napa, San Francisco, San Mateo, Santa Clara, and Solano.

Together, these counties represent one of the largest metropolitan areas in the country, a diverse community that is known not only for its great wealth, innovation, and highly educated workforce but also increasingly for growing wage inequality, skyrocketing housing costs, and a steep skills gap.

The newly reimagined organization is uniquely positioned at the intersection of all sectors to work with community leaders, businesses, policymakers, nonprofits, and individuals to effect change on a scale that no single organization can achieve on its own.

TOGETHER FOR GOOD

With 1 in 4 Bay Area residents living in poverty, the merged United Way strives to grow its efforts in improving income stability for residents across all eight counties.

United Way Bay Area remains committed to partnering with local agencies dedicated to creating a better life and a stronger community.

The combined organization draws from the talents of the corporate, nonprofit, and public sectors from both geographic areas. It will provide businesses, their employees and other constituencies with opportunities to join a network dedicated to building a better life and a stronger community—for everyone.

JUN, 2016



BRANDON

Mayor's Youth Jobs+ Beneficiary

Brandon was a high school student struggling to find bus money to get to school. In frustration, he decided to head to his school counselor's office. His counselor referred him to the Beacon Center, a nonprofit supported by United Way Bay Area. From there, Brandon was connected to the Mayor's Youth Jobs+ program, where he could practice mock interviews, search for jobs, and gain more confidence.

MAR, 2015
MAYOR'S YOUTH JOBS+ HELPS BRANDON
PREPARE FOR JOB INTERVIEWS



Today, I go to school, I have a job. United Way helped start my future.





ADVOCATING FOR POLICY CHANGES

When reflecting on our advocacy efforts in 2016, the United Way network has had one of its most successful years to date. Having co-sponsored two bills in this past year's legislative session, United Way Bay Area (UWBA) and its state association, United Ways of California, secured two legislative victories that passed without opposition. A third bill we supported also passed with bipartisan support, placing California at the forefront of health reform.

Here's a brief description of each bill:

AB 1847 (Stone) EITC Employer Notice bill helps more low-income working Californians learn about California's new state Earned Income Tax Credit (Cal EITC). It adds a paragraph about Cal EITC to the existing notice employers are required to distribute.

SB 1339 (Monning) Inter-County Transfers bill ensures more low-income Californians will be able to move across county lines without confusion, delays, or interruptions in their health and income support programs. Inter-county transfers have been an issue for years and this bill should clarify and simplify procedures.

SB 10 (LARA) – Health4All bill requires the state to apply for a 1332 waiver from the federal government, allowing all residents regardless of immigration status to purchase insurance through Covered California with their own money. This bill brings us one step closer to ensuring all Californians have access to care.

These wins represent a small part of the policy improvements we need to make if Bay Area families are to achieve the full economic opportunity our region is developing. Despite being one of the wealthiest regions in the nation, many communities still struggle to make ends meet in an increasingly costly place to live.



KEEPING COMMUNITY COLLEGE STUDENTS IN SCHOOL

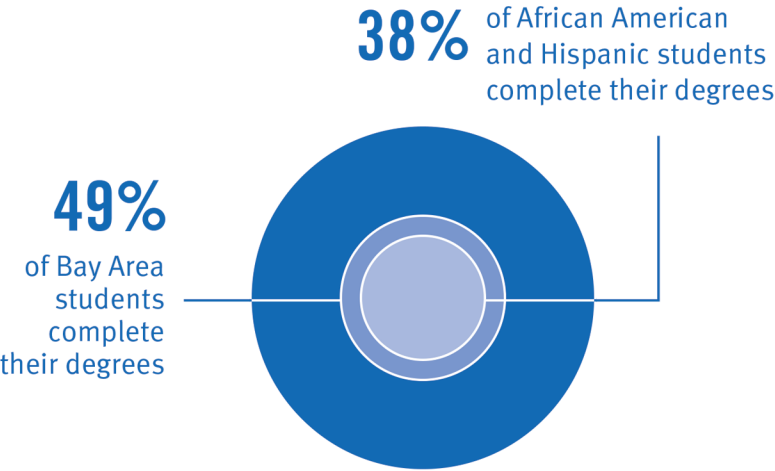
In the Bay Area, only half of students from low-income families make it to high school graduation – and less than half of students who enroll in community colleges complete their degrees. Students who fail to earn a college degree will, on average, earn a million dollars less over the course of their lifetimes than college graduates. This is unacceptable, and it’s a cycle we can end.

By partnering with community colleges, SparkPoint services provide a sense of belonging and support to students moving through training programs, and it helps to remove barriers and challenges on the path to graduation. After graduation and initial employment, SparkPoint coaching services remain available to help an individual navigate the “after hire” financial world.

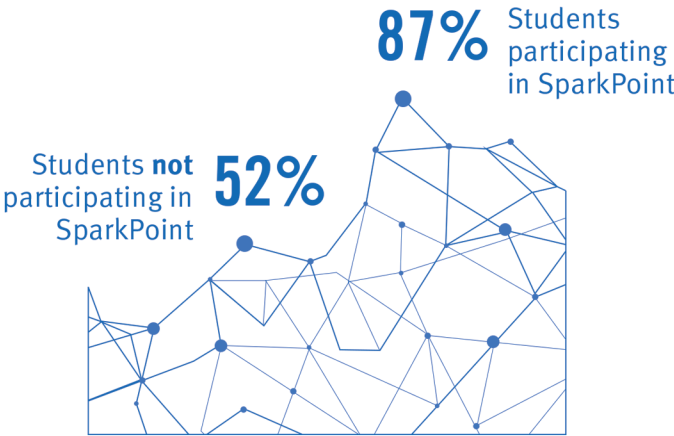
We also work to ensure that individuals looking to start a career later in life, or to start a new career – for example, veterans and re-entry populations – have access to these opportunities.



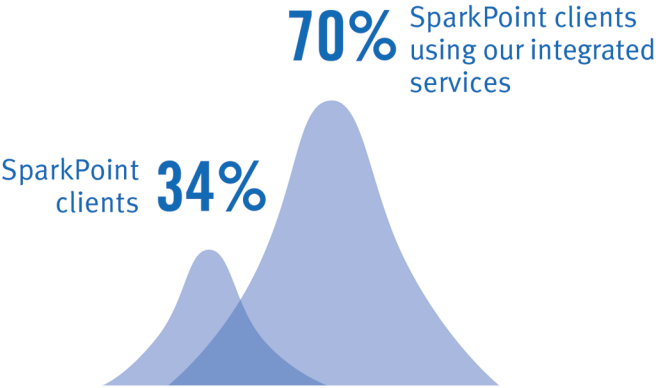
COMMUNITY COLLEGE STUDENTS IN THE BAY AREA



SEMESTER-TO-SEMESTER PERSISTENCE RATES FOR SKYLINE COMMUNITY COLLEGE STUDENTS (STRONG PREDICTOR OF COLLEGE COMPLETION)



SPARKPOINT CLIENTS ACHIEVING ONE OR MORE POSITIVE FINANCIAL OUTCOMES





VISION

Encouraged by our progress, informed by our learnings, and inspired by the moments we are making together, UWBA has outlined three primary goals to take our work even further in the 2016-17 fiscal year.

JUN, 2013
SPARKPOINT HELPS VICTOR
FIND A WELL-PAYING JOB

Addressing the needs of Santa Clara County

Now that United Way of the Bay Area and United Way Silicon Valley have merged, we are eager to combine what's working in both organizations to address the needs of Santa Clara County residents. Santa Clara County has the largest population and the second highest poverty rate in the Bay Area. Working with nonprofit professionals and community leaders, we will work to understand the specific needs of the county and bring our combined experience and resources to address these issues head on.

Expanding Advocacy Work to Address Housing

Housing is a key component of economic success – yet affordable housing is increasingly out of reach for many individuals and families. California's lowest income renters spend a median of 68% of income on rent, leaving little left for food, transportation, child care expenses, and other needs. While every county in the state has an affordable housing shortfall, the Bay Area's lack of supply has become so acute that both low and middle income households face an affordability crisis. Recognizing the critical role of housing access and affordability in addressing and preventing poverty, UWBA will advocate for policies and programs that not only increase the supply of housing, but also improve conditions for low and moderate-income families to secure safe and affordable housing.

Helping the Helpers

UWBA believes that we all have a role to play in improving our community and our world. For over 90 years we have connected those who want to help to those in need of help primarily through workplace campaigns. As technology and workplace culture has changed, we need to find new ways of supporting individuals who want to better their community. Using the talents of the many creative minds in the Bay Area and across the United Way network, we are exploring new ways to provide individualized experiences and opportunities for community members to make an impactful difference.



SOBRATO FAMILY FOUNDATION

The idea of innovation in Silicon Valley is a modern-day version of the American Dream. But it's a dream that never becomes reality for many people in the region. We believe that with so much energy and creativity, we can make it a place where we all have the opportunity to go as far as our talents and tenacity take us.

THANK YOU TO OUR GENEROUS DONORS

EMPLOYEE GIVING CAMPAIGNS | Thank you to the Bay Area employers and employees who give so generously to support our community through workplace giving. These gifts were received between July 1, 2015 and June 30, 2016.

\$7,500,000+ Wells Fargo Bank	Federal Reserve Bank of San Francisco FedEx Gordon & Rees Johnson & Johnson Companies Nordstrom Paul Hastings LLP PG&E Corporation Reed Smith LLP Sandia National Laboratories Sidley Austin Target Corporation Western Digital	\$25,000 - \$49,999 Anheuser-Busch, Inc Ball Corporation Bank of Marin Bryan Cave LLP Coupa Dr Pepper Snapple Group Kaiser Permanente Matson Nationwide Insurance Company NuStar Regency Centers Corporation SamTrans Solano County Government Employees ACCO Engineered Systems Alameda County Government Employees Chinatown Fundraising Dinner City National Bank Comerica Bank Dentons US LLP Dow Chemical Company East West Bank GE Company Jones Day Lawrence Livermore National Laboratory McKinsey & Company, Inc. San Francisco City & County Employees Shell Oil Products US Squire Patton Boggs (US) LLP	Cooley LLP Deluxe Corporation East Bay Municipal Utility District Genworth Gibson, Dunn & Crutcher LLP Graniterock IBM Corporation Illinois Tool Works JCPenney King & Spalding LLP KPMG LLP L-3 Communications Levi Strauss & Company Marin County Government Employees Morgan, Lewis & Bockius LLP Natixis Global Assett Management Northern Trust Bank of California Pacific Life Insurance Principal Financial Group Raymond James & Associates Ricoh/IKON Office Solutions Inc. Ropes & Gray LLP State Farm Insurance TE Connectivity The Boldt Company The Clorox Company The Gap, Inc. Thermo Fisher Scientific Underwriters Laboratories Inc Union Bank NA Walmart
\$1,000,000+ AT&T Corporation			
\$500,000 - \$999,999 Bain & Company Bank of America California State Employees Deloitte LLP Dodge & Cox Enterprise Rent-A-Car PwC UPS Valero Benicia Refinery	\$50,000 - \$99,999 Alameda County Government Employees Chinatown Fundraising Dinner City National Bank Comerica Bank Dentons US LLP Dow Chemical Company East West Bank GE Company Jones Day Lawrence Livermore National Laboratory McKinsey & Company, Inc. San Francisco City & County Employees Shell Oil Products US Squire Patton Boggs (US) LLP	\$10,000 - \$24,999 Abbott Laboratories Accenture BMO Harris Bank and BMO Capital Markets Cahill Contractors, Inc. Cargill Salt City of Oakland Employees Contra Costa County Government Employees	
\$250,000 - \$499,999 AAA NCNU Callan Associates Inc. Costco Delta Dental of California Macy’s Inc. Pillsbury Winthrop Shaw Pittman LLP			
\$100,000 - \$249,999 AbbVie Biotherapeutics BNY Mellon Chevron Corporation Combined Federal Campaign Comcast Cable Ernst & Young LLP			

THE KOKO CHALLENGE | Each year UWBA teams up with the Bay Area General Counsel Group and local law firms for our annual Koko Challenge. Since 1987, over \$30M has been raised by firms competing to contribute the most money and volunteer hours to the Bay Area community. In 2016 the following firms together raised over \$988,000 (including \$278,000 for UWBA) as part of the 28th annual Koko Challenge.

Bryan Cave LLP Gordon & Rees, LLP Jones Day King & Spalding LLP Morgan, Lewis & Bockius LLP	Paul Hastings LLP Pillsbury Winthrop Shaw Pittman LLP Reed Smith LLP Ropes & Gray LLP Squire Patton Boggs (US) LLP	2015 Winners: Big Koko - Pillsbury Winthrop Shaw Pittman LLP Little Koko - Paul Hastings LLP Baby Koko - Bryan Cave LLP
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Koko Kickoff 2015



JIM FOLEY
Lead Regional President - Pacific North Region, Wells Fargo

We are proud to support and work shoulder-to-shoulder with United Way to strengthen our communities. We are also appreciative of our team members who generously support United Way as volunteers and donors.

DIRECT CORPORATE GIFTS | The companies below provided generous grants or sponsorships to end the cycle of poverty in the Bay Area. These gifts were received between July 1, 2015 and June 30, 2016.

\$500,000+ Bank of America Chevron Corporation Wells Fargo Bank	\$50,000 - \$99,999 Anheuser-Busch, Inc. Salesforce.com Target Corporation	\$10,000 - \$24,999 Contra Costa Central Labor Council Deloitte First Republic Bank LinkedIn PwC The Charles Schwab Foundation UPS	\$5,000 - \$9,999 Accenture DFS Group Ltd. Ernst & Young LLP KALW 91.7 FM Kimberly Clark Corp. Marketo, Inc. Prometheus Real Estate Group Univision Western Digital Foundation Zynga
\$250,000 - \$499,999 JPMorgan Chase PG&E Corporation	\$25,000 - \$49,999 AT&T Corporation Bank of the West Enterprise Rent-A-Car US Bank Wasserman		
\$100,000 - \$249,999 Kaiser Permanente Starbucks Foundation			

FOUNDATION DONORS | United Way Bay Area gratefully acknowledges the following gifts from foundations:

\$100,000 and above Grove Foundation Siemer Institute for Family Stability Thomas J. Long Foundation Walter and Elise Haas Fund Walter S. Johnson Foundation	\$20,000 - \$49,999 Evelyn & Walter Haas, Jr. Fund John & Marcia Goldman Foundation The Morris Stulsaft Foundation	\$2,500 and below Cogan Family Foundation The David and Lucile Packard Foundation Ed & Betty Manoyan Foundation Fleishhacker Foundation Gordon and Betty Moore Foundation The Humanist Fund - Vanguard Charitable S.H. Cowell Foundation
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	\$5,000 - \$9,999 Chris German Memorial Fund Robert Wood Johnson Foundation	

ADDITIONAL GIFTS | United Way Bay Area gratefully acknowledges the following additional gifts:

Diggs v. Western Waterproofing Co. Inc. IRS, Stakeholder Partnerships, Education and Communications Mohan et al. v. Dell, Inc.	Ogbuehi v. Comcast Settlement San Francisco City & County Department of Children, Youth, and Their Families Zulewski v. The Hershey Company
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THANK YOU TO OUR GENEROUS DONORS

TOCQUEVILLE SOCIETY members are creating meaningful change in our community by lending their time, talent and expertise. Individuals annually contribute \$10,000 or more to support the fight against poverty.

Million Dollar Circle
\$1,000,000+

The Mary Jo and Dick Kovacevich
Family Foundation
Linnea and George Roberts

Centennial Circle
\$100,000+

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WOMEN UNITED is a community of women giving to United Way Bay Area an annual gift of \$1,000 or more. They are dedicated to helping low-income women and their families move out of poverty through giving, volunteering, advocating and networking.

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Kathleen Young*
Simone Yuan-Newman
Michelle Zapanta
Joanna Zinsli
Anonymous

**Denotes Women United
Steering Committee Member*

THANK YOU TO OUR GENEROUS DONORS

EMERGING LEADERS is a network of philanthropic young professionals (ages 21 - 45) who support United Way Bay Area by making an annual gift of \$250 or more. They are committed to reducing Bay Area poverty with a focus on educating and empowering youth.

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Cindy Vu*	David Lyon	Christal Rogers	Josh Wykes
Thomas E. Geidt	Andrew MacDonald	Rob Rose	*Denotes Emerging Leaders Steering Committee Member
Haley Gibson	Mary Malmgren	Tony Salvador	



TIFFANY STEWART
Emerging Leaders Steering Committee, Women United

Being able to hit such a wide net of issues in our community is really meaningful to me. Knowing that it’s not just one very isolated organization allows me to really feel like I’m making a difference. And to be able to make a difference? It’s just so huge that, no matter how I can be a part of it, I want to be a part of it.

BOARD OF DIRECTORS

Susan Sutherland <i>Immediate Past Chair</i>	Anna Mok <i>Chair, Governance Committee</i>	Members at large	Joe Laymon
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			Julia Wilhelm
			Gwendolyn Wong

FINANCIAL STATEMENT

Statements of financial position (as of June 2016)

	2016	2015
Total Assets	21,904,216	22,497,273
Total Liabilities	13,423,575	11,088,658
Total Net Assets	8,480,641	11,408,615
Total Liabilities and Net Assets	21,904,216	22,497,273
Statements of activities (as of June 2015)		
Total Amount Raised	27,969,901	29,314,953
Less Donor Designations	(20,064,721)	(22,548,748)
Provision for Uncollectable Pledges	(505,000)	(555,000)
Other Income	7,687,406	6,327,571
Total Revenue	15,087,586	12,538,776
Grants and Programs	8,636,322	8,270,972
Fundraising, Management & General	6,809,349	6,412,350
Non-recurring Expenses	2,569,889	1,609,515
Total Grants and Expenses	18,015,560	16,292,837
Change in Net Assets	(2,927,974)	(3,754,061)
Net Assets – Beginning of Year	11,408,615	15,162,676
Net Assets – End of Year	8,480,641	11,408,615





UNITED WAY BAY AREA

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July 1, 2015 - June 30, 2016

uwba.org