

2014-2015

TOGETHER
FOR [GOOD]



Annual Report



Dear Partner,

Looking back at this past year involves, for me, a sense of accomplishment, an enormous dose of gratitude, and excitement about what is to come.

The sense of accomplishment is clear – we are seeing results through our efforts to end the cycle of poverty. Because of you, United Way of the Bay Area continues to lead the community in overcoming barriers to economic opportunities. We have remained true to our core mission established more than 90 years ago: to bring together individuals, organizations and entire sectors to create big and lasting impact on our community's most pressing issues. We also empower local changemakers, like you, as focused investors in this work, which leads to the sense of gratitude I feel for your partnership in this work.

Through your support, we are able to harness new energy, engage critical partners and deliver greater results. When you partner with United Way, you understand that you are part of something greater than one organization. We are, together, creating systems change – across sectors and across communities.

Our holistic approach to ending the cycle of poverty means that we look at the big picture, advocating for and designing programs to support individuals of all ages—providing free access to **basic needs, jobs and career training, financial education, and family support services.**

And in 2015, we made real progress. With your support, more families received support services and financial education, setting them on the path to a secure future. More individuals received jobs and career training, gaining the skills to achieve their dreams. Finally, thousands of individuals and families had their basic needs met, ensuring that their health, safety and dignity remained intact. **Because we worked together, these incredible achievements were possible. For that, I am truly grateful.**


Indeed, our accomplishments in 2015 are something to celebrate, and you will read about some Bay Area residents who have been helped with your support. My sense of excitement grows, because I know what we are capable of achieving together. As you page through our collective achievements from this past year, note our goals for the future. Feel our excitement about where this work is headed—it is contagious.

We believe everyone in the Bay Area deserves the opportunity to thrive. Thank you for joining us in achieving this mission.

Warmly,

A handwritten signature in cursive script that reads "Anne".

Anne Wilson
Chief Executive Officer
United Way of the Bay Area



WHEN YOU PARTNER WITH UNITED WAY,
YOU UNDERSTAND THAT YOU ARE PART
OF SOMETHING GREATER THAN ONE
ORGANIZATION. WE ARE A COMMUNITY—
A NETWORK OF PARTNERS ACROSS
THE PUBLIC, PRIVATE AND NONPROFIT
SECTORS CHANGING LIVES TOGETHER.

— ANNE WILSON

TOGETHER FOR [FAMILY SUPPORT]

Initiative: SparkPoint Community Schools

30 PARTNERS AT 10 SCHOOLS

Our research-based and results-driven 2-generation approach tackles poverty from all sides, ensuring that entire families can thrive. In this space, we are unique leaders in the cross section between family economic success and student educational success in the Bay Area. Our SparkPoint community schools program helps children come to school safe, healthy and ready to learn, while providing parents with job training and financial education to better support their kids.

2015 RESULTS

6 K-12 SCHOOLS

established with in-house
SparkPoint presence

22,628 FAMILIES SERVED

at community schools

2016 GOALS

REFINE FAMILY SUPPORT STRATEGY

by investing in more SparkPoint centers
in community schools



Amalia was a busy single mother who struggled to get ahead and plan for her family's future. But with coaching from SparkPoint, Amalia saw real improvement with her finances. In addition to raising her credit score so that she could qualify for a home loan, she also took part in a small business workshop that inspired her to go back to school. Now she's a connected and confident business owner.

I LEARNED A BUNCH OF LITTLE TECHNIQUES I DIDN'T KNOW ABOUT AND WISH I HAD LEARNED IN HIGH SCHOOL. I COULDN'T BELIEVE HOW EASY IT WAS TO MAKE MY PAYMENTS MORE MANAGEABLE." — AMALIA

TOGETHER FOR [FINANCIAL STABILITY]

Initiatives: SparkPoint, Earn It! Keep It! Save It!

142 PARTNERS

Our SparkPoint program provides free one-on-one coaching to help people get better jobs, improve their credit and create a personalized financial plan—all in one location. Our Earn It! Keep It! Save It! program provides free tax preparation for low- and moderate-income households and puts millions of dollars back into the local economy. Together, these two initiatives are improving financial stability for thousands of Bay Area residents every year.

2015 RESULTS

2,839 INDIVIDUALS

saved money, managed their debt, and repaired & improved their credit

\$80M+ IN TAX REFUNDS

and credits returned to 74,452 low-income residents

2016 GOALS

SERVE MORE THAN 2,500 CLIENTS

with at least 400 enrolled in vocational training

PREPARE 75,000 TAX RETURNS

at over 200 locations by almost 3000 volunteers, returning over \$80 million in tax refunds

RETURN OVER \$26 MILLION

in Earned Income Tax Credit to our most vulnerable families



TOGETHER FOR [JOBS & CAREER TRAINING]

Initiatives: MatchBridge, Youth Jobs+,
Workforce Initiative 17 PARTNERS



Having lived in the foster care system since age 14, Jose lacked the support and guidance to find and land a good job. After applying for many positions with no luck, Jose found MatchBridge. Our program helped him with his resume and interview prep, and got him an interview at Ghirardelli where now, three years later, he is a manager.

Innovative programs like MatchBridge help young adults identify their interests, stay engaged in school, and find a path to good jobs and good pay. With our new workforce development initiative, we are now working to broaden that vision to integrate all the players—employers, high schools, colleges and SparkPoint partners—to provide a lasting, seamless move from school to career.

2015 RESULTS

7,678 YOUTH

connected with jobs, internships and job training through Youth Jobs+

2016 GOALS

ENGAGE MORE EMPLOYERS

across diverse industry sectors

ALIGN WORK EXPERIENCES AND INTERNSHIPS

with career pathways that represent high-wage, high-growth industries of local importance

EXPAND WORK AND INCREASE PARTNERSHIPS

in the East Bay to promote their youth workforce ecosystem

[MATCHBRIDGE] IS A REALLY GREAT PROGRAM THAT HAS GIVEN ME SKILLS THAT I WILL BUILD ON FOR THE REST OF MY LIFE.” — JOSE

TOGETHER FOR [BASIC NEEDS]

Initiatives: Emergency Food and Shelter

79 PARTNERS

Available around the clock in more than 150 languages, the Bay Area 211 helpline connects those in need with essential community services. Instead of multiple calls leading to dead ends, people can make one call to 211 and reach a trained specialist who assesses a caller's full scope of needs and matches them to the right services. 211 also assists during times of disaster, providing those in distress with critical information about evacuation routes, food and shelter. United Way of the Bay Area also supports the National Emergency Food and Shelter Program, which was created by Congress in 1983 to help social service agencies provide emergency help to those in need.

2015 RESULTS

183,474 CALLS, 133,474 WEB VISITS
for critical needs answered

\$1.8M OF FEDERAL FUNDING
to help residents with food, shelter
and other basic needs

2016 GOALS

INCREASE USER BASE BY 10%
through a new and improved
web presence

PILOT INNOVATIVE PARTNERSHIPS
with the health care sector to ensure
patients have access to resources
that can improve their health



LOOKING AHEAD IN 2016: PATHWAYS TO CAREERS PIPELINE

The continuous evaluation and refinement of our work is a unique attribute of United Way of the Bay Area. It takes close partners and trusted advisors with whom we collaborate, a keen eye for shifting trends in the social service space and a willingness to innovate and pilot new ideas. We're excited to share this new opportunity with you.

PATHWAYS TO CAREERS

We know that the best way to end the cycle of poverty is a well-paying job. So for several years we have been incubating elements of a Pathways to Careers pipeline: a seamless bridge between employers, education partners and nonprofits to create a robust pipeline of high-quality jobs and internship experiences for low-income adults and youth.

While our four pillars of work will continue, we are developing an alignment of these programs toward the Pathways to Careers pipeline. We will enhance our existing SparkPoint model, currently focused on community colleges, and combine it with our MatchBridge work to build a more coherent jobs pipeline for Bay Area residents. This model remains closely aligned with United Way's mission of reducing Bay Area poverty, and also better leverages our assets, experience, partnerships and resources.

We know we can make real progress with this streamlined model. We will bring our

strengths to the table: our ability to scale high-impact programs as you've seen with our SparkPoint program; our experience in delivering high-quality technical assistance to our partners; our commitment to data-driven, client-focused program design and our corporate and government relationships.

We need your strengths as well. We invite your partnership, your investment and your shared vision.

Join us as we move the Bay Area forward. Together we can end the cycle of poverty. Let's get to work.

If you're interested in investing in the Pathways to Careers pipeline, please contact Pamela Pretlow at ppretlow@uwba.org or 415-808-4436.



FINANCIAL STATEMENTS

	2015	2014
Statements of Financial Position (as of June 2015)		
Total Assets	\$ 22,497,273	24,529,614
Total Liabilities	11,088,658	9,366,938
Total Net Assets	11,408,615	15,162,676
Total Liabilities and Net Assets	22,497,273	24,529,614
Statements of Activities (as of June 2015)		
Total Amount Raised	\$ 29,314,953	31,452,092
Less Donor Designations	(22,548,748)	(21,884,446)
Provision for Uncollectable Pledges	(555,000)	(616,000)
Other Income	6,327,571	8,210,501
Total Revenue	12,538,776	17,162,147
Grants and Programs	\$ 8,270,972	10,411,248
Fundraising, Management & General	6,412,350	6,015,174
Non-Recurring Expenses	1,609,515	(146,908)
Total Grants and Expenses	16,292,837	16,279,514
Change in Net Assets	\$ (3,754,061)	882,633
Net Assets – Beginning of Year	15,162,676	14,280,043
Net Assets – End of Year	11,408,615	15,162,676



TOGETHER
FOR [GOOD]



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