

United Way of Tucson  
and Southern Arizona

United  
Way



**2010**  
**ANNUAL REPORT**

# GIVE. ADVOCATE. VOLUNTEER. LIVE UNITED®

United  
Way



*Dear Friends,*

For more than 80 years, United Way of Tucson and Southern Arizona has played a key role in improving lives in our community. The issues we have faced over those years have changed, but our mission – to advance the common good – remains steadfast.

This past year has been one of the most difficult in recent memory for our local economy, our residents, and the social service sector. Yet, thanks to our partner agencies and other community collaborators, we delivered what can only be described as extraordinary results. You can read more about them in the report that follows.

We owe many thanks to all our supporters who have generously given time, talent and treasures to support the United Way of Tucson and Southern Arizona in making our communities better places in which to work and live.

Today, we are looking toward a brightening future as we welcome our new President and CEO, Tony Penn. Please join us as we **LIVE UNITED®**.

Sincerely,



**Ron Sable**

*President, Concord Solutions, Ltd.  
Chairman of the Board, United Way  
of Tucson and Southern Arizona*



**Tony Penn**

*President & CEO  
United Way of Tucson and  
Southern Arizona*

## Board of Directors 2009-2010

**Ronald K. Sable**,  
Concord Solutions, Ltd.

**Larry Finuf**, Chair Elect  
Wells Fargo

**Christine McNamara**, Treasurer  
Handmaker Jewish Services, Inc.

**Steven Banzhaf**, Corporate Secretary  
Bank of America

**Dr. Louis Albert**, Pima Community College

**Paul Bonavia**, UniSource Energy

**Clarence Boykins**, Tucson Black Chamber  
of Commerce

**Rosalva Bullock**, Community Volunteer

**Bennett Burke**, Southwest Gas Corporation

**Debe Campos-Fleener**, Campos-Fleener  
Allstate Insurance

**W. Mark Clark**, CODAC Behavioral Health  
Services

**Joe Coyle**, Ritter International

**Kenneth F. Day**, LSI

**Neal A. Eckel**, Durazzo & Eckel, P.C.

**Dennis Elias**, Carillos Tucson Mortuary

**Linda Hatfield**, AFL-CIO PALF Chair

**James Holmberg**, Community Volunteer

**Michael G. Jameson**, Tucson Newspapers

**Richard Johnson**, Community Volunteer

**David Jones**, Community Volunteer

**Adaline Klemmedson**, University Medical  
Center

**Alexandra Master-Judge**, Raytheon

**Evan Mendelson**, Community Volunteer

**Randy McDonald**, Citi of the Southwest

**Charles Monroe**, Lutheran Social Services

**Patricia Raskob**, Raskob-Kambourian Financial  
Advisors

**Norman Rebenstorf**, National Bank of Arizona

**Jean Tkachyk**, University Physicians Healthcare

**Dan Vance**, Davan Investments

**Adam Weinstein**, The Gadsden Company

## Executive Team

**Tony Penn**, President & CEO

**Julie Wolfe - Beadle**, Vice President,  
Resource Development

**LaVonne Douville**, Vice President,  
Community Development

**Mary Huerstel**, Vice President, Finance

**Hal Levy**, Vice President of Leadership  
& Principal Giving

# OUR IMPACT

## EDUCATION

### Helping Children & Youth Achieve Their Potential

United Way is a strong advocate for children and youth within the community and in legislative processes, working in partnership with government and institutions to make lasting systemic changes. United Way strongly supports both Early Childhood Education and Youth Development so that children will make a successful transition to adulthood.

#### First Focus on Kids

In the past 10 years, our flagship early childhood regional partnership called First Focus on Kids (FFK) has secured more than \$45 million to improve the well-being and school readiness of Pima County's most at-risk children. A key contributor and champion for FFK is the Diamond Family. With 33 percent of children entering kindergarten lacking the skills essential for school success, we need to continue to focus on our most at-risk children.

##### OUR FOCUS:

- Improving the quality of early care and educational experiences
- Promoting early literacy
- Supporting parent and teacher education
- Improving nutrition and oral health education
- Enhancing community awareness

#### Youth Development Coalition

Established in 2003, the Youth Development Coalition (YDC) is a regional partnership to improve outcomes for youth in Pima County. Today, the YDC has more than 40 members and is still growing.

##### OUR FOCUS:

- Improving youth program quality
- Increasing access to health/nutrition services
- Improving work readiness
- Improving youth worker education
- Enhancing community awareness of the importance of quality youth development opportunities

*With these strategies we are working to ensure that youth are ready by age 21: ready for school, work and life.*



*Tucsonan Luis Montemayor invests in Education*

# INCOME

## Promoting Financial Stability and Independence

Many hard-working residents of Southern Arizona are living below a sustainable income level and struggling to make ends meet. For these people, a single unanticipated expense can lead to a family financial crisis. United Way of Tucson and Southern Arizona's Financial Stability Partnership works to link individuals and families to the resources and opportunities that can help them:

- Increase income
- Build savings
- Gain and sustain assets as they move toward greater financial well-being

## VITA

The United Way of Tucson and Southern Arizona and its partners offer free tax preparation to low- and moderate- income families and individuals in Southern Arizona.

The VITA program ensures that individuals and families receive all tax benefits for which they are eligible, most importantly the Earned Income Tax Credit (EITC), which has been recognized as the single most powerful tool to lift children out of poverty.

In 2010, VITA volunteers prepared nearly 8,000 tax returns and brought back \$ 10.7 million in federal refunds and credits to Southern Arizona families, including more than \$5 million in EITC funds.

In 2010, United Way was named by the Internal Revenue Service (IRS) as its 2010 "Partner of the Year" for the Phoenix Territory, which covers all of Arizona and New Mexico.



## Helping the Working Poor

Our Helping the Working Poor funds are invested in partner agency programs that serve individuals and families with low-wage jobs that just can't make ends meet. By investing a portion of your United Way contribution in Helping the Working Poor, you help provide the means to increase self-sufficiency – and you could receive an Arizona state tax credit.\*

In order for a partner agency to qualify to receive Helping the Working Poor funding, it must be able to show that its programs help needy families achieve a higher level of self-sufficiency by providing job-skills training, education and job placement. Additionally, common barriers to gaining and maintaining employment must be addressed, including affordable childcare, food, clothing and shelter.

*\*Arizona State Income Tax credits of between \$200 and \$400 are available based on your income tax filing status. United Way of Tucson and Southern Arizona is not a tax advisor. As with any financial recommendation, contact a qualified tax professional for expert advice on your specific tax situation.*



# OUR IMPACT

## HEALTH

### Improving People's Health

The progression to a healthy life begins before birth and follows through every stage in life: we focus on prenatal and infant care, access to preventive health care, healthy lifestyle choices for young people and adults, wellness for older adults and respite for those caring for aging parents.

We connect older adults to meaningful volunteer opportunities such as Experience Corps, Senior Companions, Victory Volunteers, Neighbors Care, and Economic Security Initiative. By working with partner agencies throughout the region, more than **2,000 seniors** “gave back” **102,000 hours** of service and reported improving their own quality of life, creating meaning and purpose to their retirement years.

*The progression to a healthy life begins before birth and follows through every stage in life...*

*Senior Volunteer Sue Strickland*



# GIVE. ADVOCATE. VOLUNTEER.

By donating to United Way of Tucson and Southern Arizona, you are helping to advance the common good in the areas of Education, Health and Income. With your help, we can reignite a movement that is committed to creating opportunities for everyone.

## Workplace Campaign

More than 30,000 donors invested in our community last year through their United Way of Tucson and Southern Arizona workplace campaigns. During campaigns, employees receive valuable information about the needs of their community and how they can easily help meet those needs with a generous gift through a convenient payroll deduction.

## Leadership Giving Society

These individuals have given \$500 - \$9,999 annually and show extraordinary concern, foresight and dedication to ensuring a high quality of life for all of our neighbors.

## Tocqueville Society

Each year, generous and distinguished members have stepped forward to demonstrate an extraordinary commitment to positive change in our community. Membership in the Tocqueville Society is granted to individuals who contribute at least \$10,000 annually to United Way of Tucson and Southern Arizona.

## Public Policy

To help ensure better results for children, families and seniors, United Way's Public Policy committee is working to ensure national legislation supports the needs of our community. As part of this effort, United Way annually adopts policy agenda based on input from its three impact councils. Last year's priorities included quality childcare, childcare subsidies, Out-of-School Time programs for children and youth, opportunities for youth employment and job-training, support for low-income families and seniors, home and community-based services for the elderly and disabled and health insurance for low-income individuals and families.

## Diversity and Inclusion

Volunteers have the opportunity to join United Way's affinity groups, including **Women Leading United**, **Young Leaders Society**, and **United Way Inclusion Council**. All provide social, networking, educational, and professional development opportunities

## United Way Days of Caring 2010

United Way Days of Caring is Pima County's largest volunteer initiative and connects volunteers with local nonprofit groups. Days of Caring volunteers complete projects that will make a lasting impact on the lives of children, families and seniors in our community. Projects this year ranged from landscaping a school in South Tucson to painting walls at the Y and spending time with children at the Boys and Girls Clubhouse. These volunteers, like all who support United Way, have a direct positive impact on life in Southern Arizona, now and in the future.

In 2010, **2,700 Days of Caring Volunteers** helped **82 nonprofit** agencies to make a lasting impact on the lives of children, families and seniors.



# The Top 75 Local Distributions from United Way of Tucson and Southern Arizona for EDUCATION, INCOME and HEALTH for 2009-2010\*

## \$1,600,000 +

Child & Family Resources - Tucson

## \$900,000 +

Easter Seals Blake Foundation

## \$150,000 - \$199,999

Casa de los Niños

The Parent Connection

Community Food Bank

University of Arizona/UA Foundation

Make Way for Books

## \$100,000 - \$149,999

Pima Council on Aging

YMCA of Southern Arizona

## \$80,000 - \$99,999

Pio Decimo Center

American Red Cross Southern Arizona Chapter

American Cancer Society - Tucson

Boys & Girls Clubs of Southern Arizona

## \$65,000 - \$79,999

Big Brothers Big Sisters of Tucson

Emerge! Center Against Domestic Abuse

Salvation Army - Southern Arizona

Tucson Urban League

Outer Limits School

## \$60,000 - \$64,999

Microbusiness Advancement Center

Parent Aid

Gospel Rescue Mission

PRO Neighborhoods

## \$50,000 - \$59,999

Catholic Community Services of Southern Arizona

Angel Charity for Children

St. Elizabeth's Health Center

Early Childhood Development Group

La Frontera Arizona

Carondelet Foundation

Pima Health System

## \$35,000 - \$39,999

Our Family Services

Catalina Council, Boy Scouts of America

Catholic Social Services of Southern Arizona

## \$30,000 - \$34,999

Reach Out and Read Arizona

Volunteer Center of Southern Arizona

Flowing Wells Community Extension Programs, Inc

Arizona's Children Association

Lutheran Social Services of the Southwest

Ronald McDonald House Charities of Southern Arizona

American Diabetes Association

Jewish Family & Children's Services of Southern Arizona

## \$25,000 - \$29,999

Tu Nidito Children and Family Services

Arizona's Children Association Foundation

American Heart Association - Tucson

St. Gregory College Preparatory School

## \$20,000 - \$24,999

Habitat for Humanity Tucson

Crisis Pregnancy Center of Tucson

Interfaith Community Services

Nosotros, Inc. DBA El Rio Preschool

Primavera Foundation

Tucson Jewish Community Center

TMM Family Services

Catholic Foundation for the Diocese of Tucson

## \$15,000 - \$19,999

TMC Foundation

Community Outreach Program for the Deaf

DIRECT Center for Independence

Tucson Nursery School

Youth On Their Own

San Miguel High School

Salpointe Catholic High School

Casa de Esperanza

## \$10,000 - \$14,999

Southern Arizona AIDS Foundation

Linkages

Girl Scouts of Southern Arizona

Teen Challenge of Arizona

El Rio Health Center Foundation

Southern Arizona Legal Aid, Inc.

Shepherd's Fold Preschool

Pima County Interfaith Council

Community Foundation for Southern Arizona

Literacy Volunteers of Tucson

CODAC Behavioral Health Services

Vets4Vets

## \$5,000 - \$9,999

Gentle Hands Center for Children

New Beginnings for Women & Children

Junior Achievement of Arizona, Inc.

## Grand Total: \$6,000,000 +

\*Distributions include allocations, grants, donor designations and amounts distributed from donor advised funds.

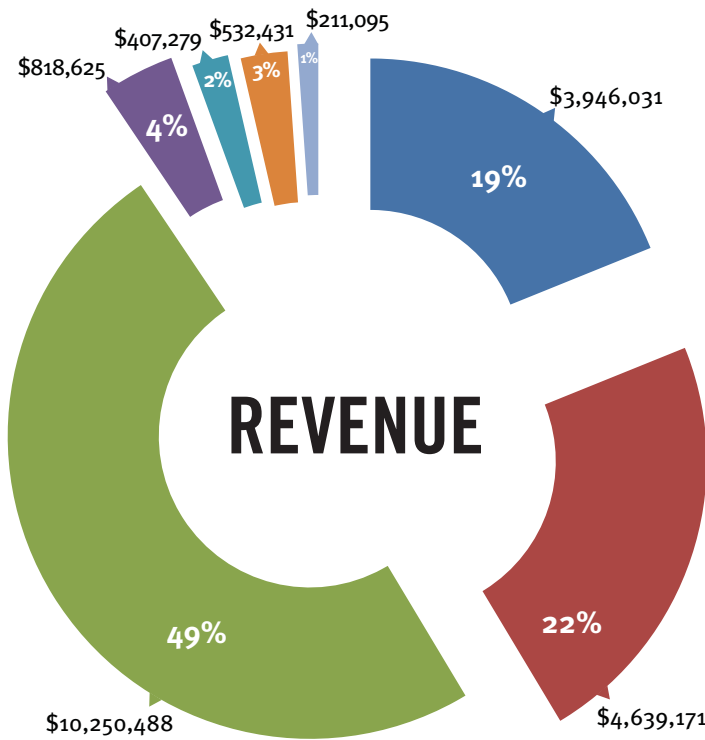
*"Citi proudly returned as a United Way supporter in 2010, building on 6 years of successful and rewarding partnership. The Citi Youth Financial Education program represents Citi's ongoing commitment to maintaining the quality and accessibility of financial education in Arizona. Citi employees enthusiastically participate in Days of Caring volunteer projects and are actively engaged in Young Leaders Society activities every year."*

Jason Ott, Community Relations  
State Director, Citi

*Citi employees gather for a United Way fundraising event for the 2010 campaign*



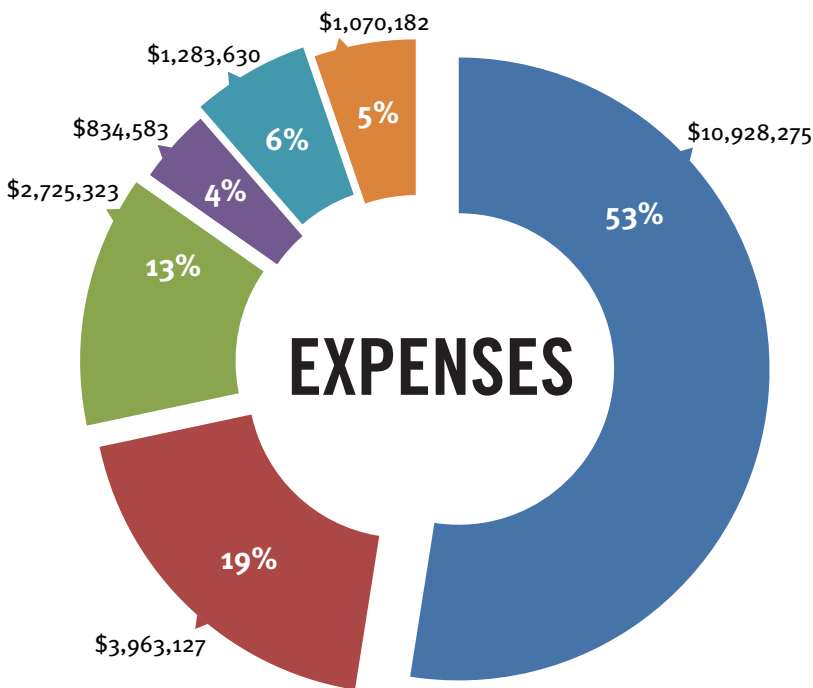
# Financials



- Donor Designations
- Total Contributions and Grants
- Federal & Other Government Grants
- Rent Revenue
- Investment Income
- Program Fees & Other Income\*
- United Way Reserves

**TOTAL REVENUE \$20,805,120\*\***

\* Amount recovered for fundraising and administrative costs in accordance with United Way Worldwide standards  
 \*\* Amount of total revenues includes amounts raised on behalf of others plus United Way Reserves



- Allocations & Grants
- Donor Designations
- Community Impact Program
- Facilities Support to Nonprofits
- Fundraising
- Management & General

**TOTAL EXPENSES \$20,805,120**

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**United Way of Tucson  
 and Southern Arizona**

