

2022 Annual Report

PURPOSE.FULL



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These local community and business leaders strategically guide the work of Orange County United Way, an independent 501(c)(3) charitable organization.

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OUR PURPOSE

Orange County United Way's purpose has always been—and will always be—people. We felt this as strongly as ever last year as our community faced daunting and wide-reaching challenges.

Although the pandemic was beginning to recede, its damaging effects were still reverberating. A shifting economy with skyrocketing prices and inflation made getting by even harder for local families, created greater adversity for students, and compounded precarious living conditions for neighbors at risk of or already experiencing homelessness.

Intention in Action

Again, the people of Orange County rose to the occasion, uniting with us to help those who need it most. They poured their passion into solving new problems in new ways, energized around our key initiatives and our vital, foundational work. They gave their time and treasure and championed United Way's innovative programs and events.

Together, we were *purpose-full* in pursuit of a better Orange County.

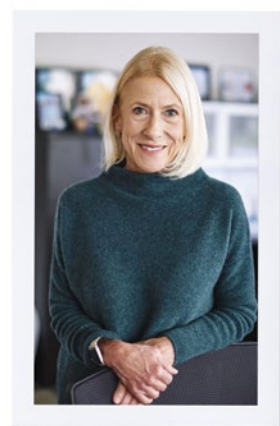
That's The OC Way

In this year's report, you'll meet some of these neighbors and read their stories of exceptional purpose. We hope they uplift and inspire your purpose too. Whether you're leading a company and want to offer employees an opportunity to engage, or you're an individual who wants to be an active part of driving local change, let's talk about the ways we can work together to improve lives in our community.

In our 99th year, we're thinking non-stop about the "ways" we can unite to empower everyone who lives here. We're making bold plans to ensure United Way can facilitate the unique energy, compassion and shared determination of Orange County to purposefully help others into the future. Because that's The OC Way.

Sincerely,

Susan B. Parks
President & CEO
Orange County United Way



**“EFFORTS AND COURAGE ARE NOT ENOUGH
WITHOUT PURPOSE AND DIRECTION.”**

John F. Kennedy said these historic words as U.S. President. But they could just as well define the intention required for a community to make a difference in people's lives today.



PURPOS

BY FULFILLING OUR PURPOSE, WE HELP OTHERS ACHIEVE THEIR PURPOSE TOO

Orange County United Way's highest purpose is to always be there to help those in our community who need help the most. We focus on three key initiatives:



UNITED TO END HOMELESSNESSSM

Finding a place to call home—and being able to stay there—is the foundation to building a life of purpose. We're committed to ending homelessness in Orange County.



UNITED FOR STUDENT SUCCESSSM

A good education is a strong start for a healthy, purposeful future. We're ensuring local students receive support to graduate high school on time and be ready for college, careers and beyond.



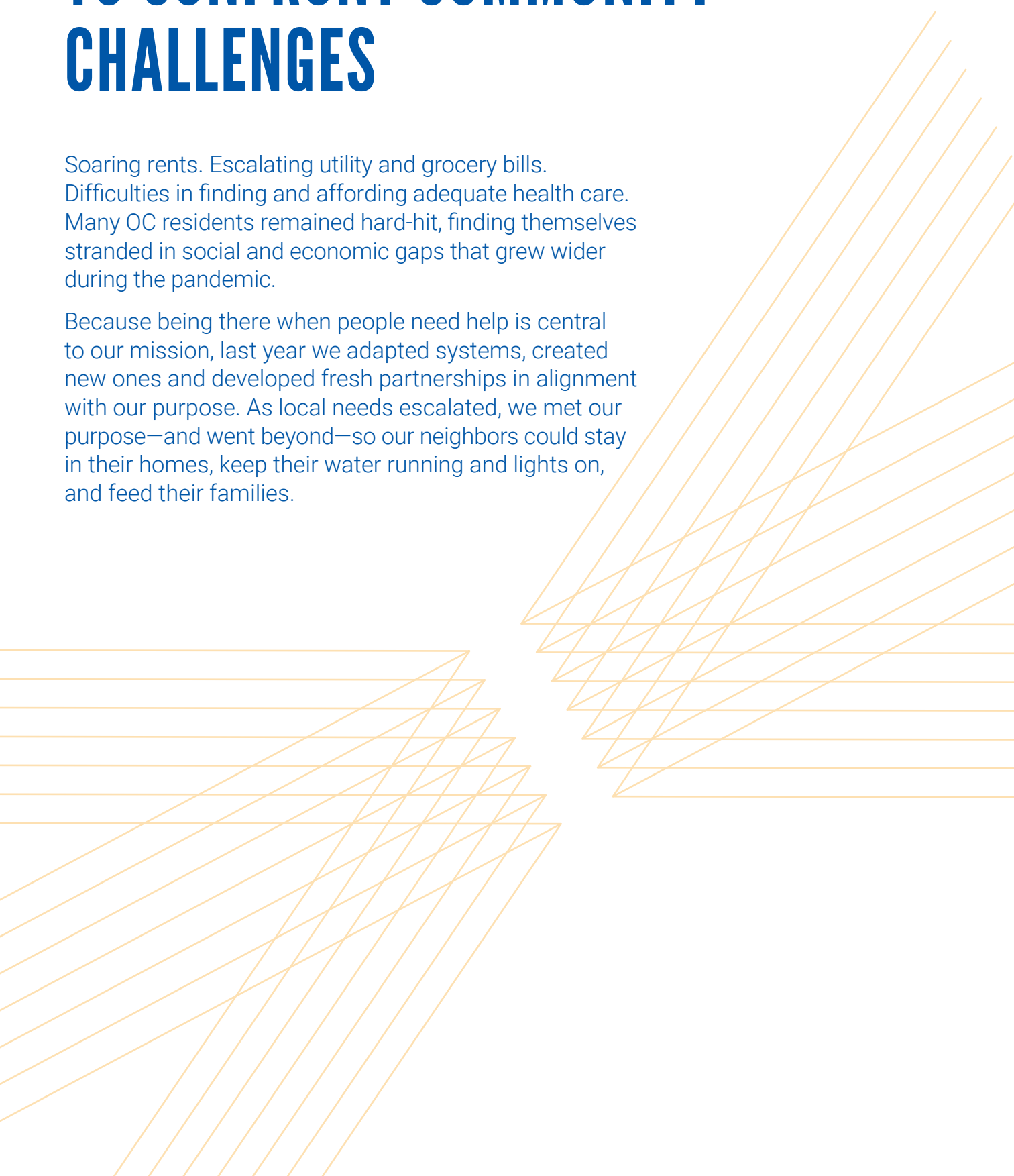
UNITED FOR FINANCIAL SECURITYSM

Empowering people to be financially stable gives them tools to achieve their desired purpose. We're helping individuals and families in OC gain skills and confidence to thrive.

STRETCHING OUR PURPOSE TO CONFRONT COMMUNITY CHALLENGES

Soaring rents. Escalating utility and grocery bills. Difficulties in finding and affording adequate health care. Many OC residents remained hard-hit, finding themselves stranded in social and economic gaps that grew wider during the pandemic.

Because being there when people need help is central to our mission, last year we adapted systems, created new ones and developed fresh partnerships in alignment with our purpose. As local needs escalated, we met our purpose—and went beyond—so our neighbors could stay in their homes, keep their water running and lights on, and feed their families.





8,931

8,931 households kept from homelessness

We processed and distributed over \$81 million in federal and state Emergency Rental Assistance (ERA) from 2021 through October 2022, relieving local families of the fear of eviction and falling into debt from rent and utility bills. We also administered additional funds for Orange County's Emergency Food and Shelter Program (EFSP) to help even more neighbors.

131



131 local non-profit and grassroots organizations funded to advance health equity

Partnering with the Orange County Health Care Agency (OCHCA) Office of Health and Equity (OPHE), we provided workshops and resources to help non-profit and grassroots organizations apply for \$9.2 million in grants to solve local health disparity issues. The program is part of the CDC's national initiative to address COVID-19 health disparities among underserved and high-risk populations, including racial and ethnic minority populations and rural communities.

VALUE TO THE COMMUNITY

Intentional, collaborative action taken by caring people is a force multiplier. Well-defined, purposeful work resulted in positive impact throughout Orange County.

\$17,640,986

PROGRAM SUPPORT



\$1,116,614

VOLUNTEER HOURS



\$96,093

DONATED GOODS
(IN-KIND DONATIONS)

\$10,424,464

SAVINGS TO OUR
COMMUNITY BY
HOUSING NEIGHBORS
EXPERIENCING
HOMELESSNESS



\$2,997,886

CDC HEALTH EQUITY GRANT

\$104,7

LAST YEAR, WE SERVED **1,010,443** PEOPLE THROUGH DIRECT SERVICES AND PROGRAMS, OUR FUNDED PARTNERS NETWORK AND ESSENTIAL COMMUNITY OUTREACH.



\$2,828,404
TAX PREPARATION FEE SAVINGS

\$16,553,175

OC FREE TAX
PREP REFUNDS

\$47,427,488

EMERGENCY RENTAL ASSISTANCE



\$5,684,985

EMERGENCY FOOD AND
SHELTER DISTRIBUTIONS

TOTAL VALUE FOR OUR COMMUNITY

70,095



ENDING HOMELESSNESS TAKES INVOLVEMENT, ADVOCACY AND OUTREACH

As the housing crisis expands and Orange County's rental market tightens, United Way continues to attack the issue. Innovative educational and advocacy programs raise awareness and motivate action for affordable and permanent supportive housing. And through our housing navigation program, WelcomeHomeOCSM, we ended homelessness for more of our neighbors.

◀ **Bernadette** | WelcomeHomeOC Housing Program Beneficiary

"I wanted to save myself. To be successful and have a stable lifestyle. The way I grew up was the opposite." When Bernadette's mother lost custody of her and her five siblings, she became part of the Orange County foster care system. Then, when she "aged out," our WelcomeHomeOC program helped Bernadette find and furnish her home. "My apartment has given me so much more confidence and maturity. I caught up way quicker to where I'm supposed to be." Now a student at Fullerton College majoring in fine arts, she also takes business and real estate classes, writes music, and works as a server. "I'm going to school because I want to help save other people. That is my purpose."



**UNITED TO END
HOMELESSNESSSM**



Funding to Fight Homelessness

Senator Tom Umberg championed and secured \$4.9 million for United to End Homelessness, supporting the WelcomeHomeOC landlord incentive program and our housing advocacy work. These funds will increase our ability to house local people as well as amplify community voices for change.



Engagement and Training

Education and advocacy are keys to the solution. Through 83 events, 2,680 people have been empowered to be part of ending homelessness in their communities.



Affordable Housing Increased

Volunteers in our **Housing Champions Advocacy Network** engaged with their local elected and appointed leaders to voice their support for housing solutions. As a result of these coordinated efforts, 337 housing units were added (215 permanent supportive, 122 affordable).



Work to Overcome Housing Barriers

In 2022, **WelcomeHomeOC** helped 212 local people find a place to call home in apartments throughout the county. In the face of rising rents, scarce units and more applications than ever before, our housing navigation program found new ways to overcome barriers, including using flexible funding to help clients attain housing, offering property provider bonuses and canvassing to find vacant units.



◀ Rona Smyth Henry | United to End Homelessness | Housing Advocate

“I lived away from California for 30 years. When I came back and saw the tent cities, I had a gut punch to my stomach.” That’s when Rona decided to take action to end homelessness. She became a housing advocate, learning more about the issue at United Way education sessions. She says, “If you want to make a difference, work local. Elected officials pay attention when we show up and make our views known. When basic needs are met, it allows people to meet their potential. In the end, we all benefit.”

Coming from the hotel industry, the Patel family knows the importance of a safe place to live and they feel a strong connection to solving homelessness in Orange County. With its core purpose to unleash human potential, the Tarsadia Foundation partners with United Way for its efficient structure and its systems that create impactful change. Foundation CEO Maya Patel says, "I try to bring people together. We can help each other find the solutions. We have a crisis in our community, and more and more people see it. You have to live in your heart and have your heart and mind work together. A group of people with a common goal can trigger a movement and make a difference."

✔ **The Tarsadia Foundation** | United to End Homelessness Supporter



**UNITED TO END
HOMELESSNESS** SM



UPLIFTING OC STUDENTS FOR LIFELONG SUCCESS

In the last school year, we helped more than 3,652 underserved students stay on track, graduate high school on time and prepare to flourish in college, careers and beyond. United Way programs build educational equity in our community. Just as important, they support and inspire local learners with exciting opportunities to gain confidence and skills.

 **Hugo** | Youth Career Connections Program Start-Up Boot Camp Participant

Hugo is in independent studies and on the tennis team as a junior at Katella High School. With boundless energy, he works two restaurant jobs as a cook, cashier and social media manager. Hugo envisions a future with better opportunities for himself and his mother, so he's helping her get her GED. What's more, he runs a catering business with a standout product: Huguito's Chilitos. Hugo jumped at the chance to join our Start-Up Bootcamp for Student Entrepreneurs where he spent weekends refining his Mexican candies and getting hands-on guidance from established business owners. He reflects, "It was a hectic time, but worth it. I have big dreams and I'm gonna run for it. I picture myself in a better position than I am right now."



**UNITED FOR
STUDENT SUCCESSSM**



Hands-On Career Preparation

Through **Youth Career Connections**, 1,242 local students were supported and motivated to imagine—and experience—career success. Volunteers and mentors gave 7,678 hours for classroom visits, mock interviews, resume workshops and more. Internships provided valuable experiences in understanding workplace culture to apply in the future. One participant said, “One of our supervisors showed us that not everything’s about working, but also about having fun.”



Nurturing Community Engagement

Our newly formed **Student Advisory Council** developed leadership and advocacy skills. The 61 high school sophomores and juniors visited city council, board of education and other local government meetings across OC and participated in community service events where they met elected officials and constituents. They learned about education issues and, by joining with like-minded peers, worked for equitable educational opportunities.



Two New Programs Introduced

New offerings increased career exploration opportunities: **First Responders Academy**, in partnership with Falck Mobile Health, provided students hands-on technical training, including CPR instruction, partial EMT training and an ambulance ride-along. **Start-Up Bootcamp for Student Entrepreneurs** inspired young innovators with five months of learning about honing business ideas, taking calculated risks, making projections and raising capital plus managing expenses and marketing techniques.



100% of e-Mentees Graduated

This year, e-Mentors from 75 local companies shared 1,567 hours of advice and encouragement with students from 14 high schools in three districts (Santa Ana Unified, Anaheim Union, Garden Grove Unified). We’re proud of these students—all of them completed our **e-Mentorship Program** and graduated on time! Each student chose either a new laptop or a scholarship to help them succeed in the next steps of their education and career journey.



◀ **Nisha Verma** | Partner, Labor and Employment, Dorsey & Whitney LLP
United for Student Success Supporter

When Nisha joined Women United a decade ago, she saw our affinity group as a worthwhile investment of her time and money. As her career progressed, Nisha found more connections between her work, her beliefs and opportunities to make a difference. It felt natural to spearhead United Way’s First Responders Academy program to introduce students to careers that don’t require a four-year degree. And it felt right to encourage her firm to participate as a sponsor for events. “Making a long-term investment in your community—when you see the right synergy—is always going to pay dividends.”

**Ruben Rodriguez**

Development Operations Engineer
Automobile Club of Southern California
Class of 2022 e-Mentorship Program Mentor

A successful computer software engineer, Ruben wants to encourage young Hispanic students to continue their education beyond high school. He was the first in his family to go to college—and in his second year volunteering for our e-Mentorship program, it's something he has in common with both of his mentees. "I believe my purpose is to help them. I just give them a bit of a nudge. And that's going to help everyone down the line. Because the more education you get, the better life you can have." Ruben is passionate about others in his Hispanic Business Resource Group getting actively involved too. "If you can help one person and there's 600 of us, 600 people have been helped."





EMPOWERING FINANCIAL SECURITY AND SELF-SUFFICIENCY

Assistance to help families keep more of their hard-earned money. Training for higher-paying jobs. Education and support to foster long-term financial stability. A project that improves access to technology—and another that made children’s wishes come true. We expanded life-changing work so low-income neighbors can go from surviving to thriving.

◀ Eva | SparkPoint OC Program Participant

Eva didn’t expect to raise three grandchildren. But when the parents couldn’t provide a stable environment, she and her husband upended their lives completely to take them in. Now flourishing in sixth grade, second grade and kindergarten, the kids are a blessing—and a huge strain on already-tight finances. Through our SparkPoint OC program, Eva learned how to budget, the value of good credit, and not to go grocery shopping on an empty stomach. She even made an extra car payment. “It’s been hard, but I wouldn’t change a thing. I give thanks to God we haven’t lacked for food or clothes. I want most for my grandchildren to graduate to a career of their liking and to be good citizens.”



**UNITED FOR
FINANCIAL SECURITYSM**



Enhancing Local Financial Security

Stats tell the story: our **SparkPoint OC** financial empowerment program served 450 vulnerable OC families. 62 families became stably housed, 137 people attended financial literacy classes, and 122 clients improved their credit scores.



Old Tech, New Possibilities

The new **Closing the Digital Divide** program recycles and refurbishes used technology. For low-income OC families, these devices mean opportunity for school and business success. Partner Ingram Micro donated 100 laptops, 400 refurbished smart phones and accessories and provides recycling services for the program. Avanir Pharmaceuticals (now integrated into Otsuka America Pharmaceutical, Inc.) joined with a donation of nearly 300 used devices.



Sparking Joy for Children and Families

Volunteers joined to provide toys, games and other wish-list items, wrap and coordinate gift deliveries for children of families participating in our Sparkpoint OC program. **SparkJoy** truly brightened the holidays for 608 children and everyone who took part in the happy event!



Training for Long-Term Employment Success

Our **UpSkill OC** workforce development program served 41 people, helping them move from unemployment or underemployment to long-term, livable-wage careers.



Helping Neighbors File Taxes

OC Free Tax Prep served over 14,000 low-income residents. The average adjusted gross income of participants is \$27,592, so getting the valuable refunds and credits they earned makes a real difference. United Way leads this countywide effort, training more than 400 volunteers at 40 tax prep sites with 25 partner agencies.

◀ **Bonnie Stramer** | OC Free Tax Prep Program Volunteer

Bonnie had her own tax practice for four decades and remembers United Way recruiting volunteers. When she sold her practice, she finally was able to say yes. Five years later, she says, "I love to help people. My years of knowledge are not going to dust, and it's rewarding to see how happy people are when they get their refunds." She adds that it's a myth that you have to be an "analytical nerd" to take part. "We can always use more people to go out into the community where they live and help. If you're a people person, you're going to enjoy yourself and get a reward from giving your time."



**Jay Orlandi**

Executive Vice President
and General Counsel
Pacific Life

**United for Financial
Security Supporter**

Giving back to the community is a core goal and value of Pacific Life. Jay says, "We're a quantitative and data-focused company, so our mindset is making sure we're thoughtful about programs we support. We've decided to place bigger bets to help distribute resources to the areas of greatest need." This resonates with Jay. "I had some helping hands over the course of my life. So being associated with an organization that wants to give back, having a personal desire to give back, and having Orange County United Way being able to support all of that is a great trifecta for me."



**UNITED FOR
FINANCIAL SECURITYSM**

AN EVENT-FULL YEAR

Rally for Change Corporate Social Responsibility Celebration

Recognizing the individuals and companies who champion change in Orange County, nearly 300 leaders gathered at Edwards Lifesciences for our corporate social responsibility event. Ingram Micro further bolstered their support for our mission with the presentation of \$750,000 to United Way.



Champion Sponsors



United4OC Awards

SMALL COMPANY:



MEDIUM COMPANY:



LARGE COMPANY:



Local, Global & Me

The Women United affinity group hosted 10 virtual sessions promoting holistic health and wellbeing. UC Irvine's Dr. Mahtab Jafari inspired 465 attendees throughout the yearlong journey sponsored by Bank of America.



Cultures United Conversation Series

Dialogue, collaboration, philanthropy and unity were the focus at 12 virtual conversations about diversity in our county. Sponsored by California Bank & Trust, 2,600 attendees joined the livestream discussions to highlight and celebrate differences and share strengths.



2022 Scorecard Event Series

Over 900 viewers joined us as our Leadership Council Chairs and Executive Directors shared accomplishments, challenges and success stories for our three key initiatives. Many thanks to the session sponsors:

United to End Homelessness



United for Student Success



United for Financial Security





19th Annual Women's Philanthropy Fund Breakfast

Celebrity guest Misty Copeland inspired over 650 in-person and virtual attendees as she spoke about the power of giving back. Nearly half a million dollars was raised to target poverty and housing instability in underserved Orange County neighborhoods. In a special moment, the student news anchors from Paul Revere and RH Dana elementary schools (two impact hubs funded by the Breakfast) returned with a new edition of their popular "OC Way Report."

Champion Sponsors



The M.O.B. (Men of the Breakfast)

In 2022, this alliance of local leaders grew larger and stronger. Through networking and exciting events such as last year's Garages of Orange County tours, the guys are showing their support and having a great time too.



LEADING THE OC WAY: THE ALEXIS DE TOCQUEVILLE SOCIETY

A passion for bettering our community unites nearly 400 members in purpose-driven, active philanthropy.

The Zest of OC Raised Over Half a Million

More than 200 local changemakers gathered to celebrate the zest of Orange County's philanthropic spirit and recognize community leaders. Special guest, Yeni, shared her story of growth and success as a participant in our SparkPoint OC financial empowerment program.



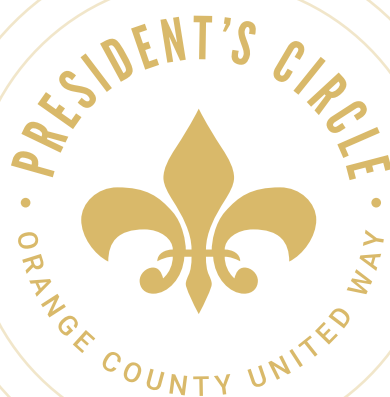
◀ **The Legacy Medal** was awarded to **Artyn and Max Gardner**. Members of Orange County United Way's Million Dollar Roundtable, they have embodied the spirit of giving and actualized philanthropy for many years.



▲ For dedication to breaking barriers and passion for inspiring change, **Maya Patel** and the **Tarsadia Foundation** were recognized with the **Inspiration Medal**. They are also valued members of the Million Dollar Roundtable.



➤ **Linda and Mike Mussallem** received the **Taking Action Medal** for their consistent, generous support in addressing critical local issues. Under Mike's leadership as CEO of Edwards Lifesciences, the company has created a culture of giving and raised the bar for corporate social responsibility.



Generosity with a Purpose

President's Circle members empower long-term, local change with an annual contribution of \$10,000 or more directed specifically to Orange County United Way's programs.

Thomas and Bonnie Abate	Bruce and Anne Fettel	Michael L. and Nancy B. Meyer	Jim Scheinkman and Cindy Eden
Alexandra and Alan Airth	Shirin and Milaad Forootan	Jim and Ann Morris	Ernest and Donna Schroeder
Steven and Kristy Allison	Vito and Mary Francone	Susan D. Morrison	Denise Schuler
Ben and Charmaine Alvarado	Artyn and Max Gardner*	Mike and Linda Mussallem	Erin Schwarz
Greg Amparano	Christine Gibson	The Myers Family Foundation	Scott and Karen Sherman
Charles and Dawn Antis	Adrian and Kristen Griggs	Peter and Gail Ochs	John and Renee Simonis
Lawrence R. and Sandra C. Armstrong	Mark Grosvenor and the J. Mark Grosvenor Foundation	Jay and Lisa Orlandi	Amy Smith & Jeff Petsche
Greg and Cathleen Backley	Karen Grundhofer	Maggie O'Sullivan	Brenda Springer
Jacques Ballard	Nancy Handel	Nella Webster O'Grady and Kevin O'Grady	The Nancy and Geoffrey Stack Family Foundation
Dawn Behnke	Casey and Leah Hannegan	The Stephen G. Oswald and Regina Oswald Foundation	Susan Stoneburner
Shirin Behzadi and Perzan Irani	Donna Hansen	Kenneth Parker and Carol Normandin	Tom and Marilyn Sutton
Dennis and Carol Berryman	Mark and Laurie Henigan	Susan B. and Dennis Parks	Laura Tarbox
Karen Bigman	Peter and Susan Hitch	Maya Patel	Peter and Mary Tennyson
Fred A. and Diane F. Blum	Jaime Lynn Fuller Memorial Fund	Peggy Penjoyan	Linda Thai and Randall Takahashi
Sherri Bovino	Michael Johnson	The Podlich Family Fund	Jeffrey Thomas
John and Tasia Boyle	Michele Johnson	Mr. & Mrs. Prichard	Shelley Thunen
Gregory Burden	Sinan Kanatsiz	Becki Procsal	John and Kirsten Valenta
Darryl and Karla Button	The Kehl Family Fund	Shirley and Steve Quackenbush	Rao and Rani Varanasi
Antonella Castro and Bradley Schumacher	Rick and Anne Keller	Michael Ray	Raju and Vani Varma
Joe and Kathy Celentano	Jackie and Steve Kelley*	Win Rhodes	John and Megan Waldeck
Nandakumar and Mrudula Jyothi Cheruvatath	Robert Kent	Victoria Rixon	Gary Wescombe
Steve and Cinda Churm	Sarah and Randy Lake	Tom Rogers and Sally Anderson	Larry Wood
Timothy and Madeleine Clyde	Marc and Tina Ley	Bill Rooklidge	Don and Anne Yahn
Matt and Kayla Collins	Kenneth and JoAnn Lickel	Steve and Kimberly Roush	Richard and Lisa Yates
Victoria and David Collins	Lisa and Mark Locklear	Grant Russell and Jacqueline Erikson Russell	Todd and April Zegers
Roger and Marjorie Davisson	Mike and Debe Lucki		
Shirish Dayal	The Masson Family Foundation		
Dilanthi De Alwis-Mummert	Paula Mattson		
Delia Delgado	Rashmi Menon		
Laurie and Scott Dubchansky	Gene and Rose Mergelmeyer		
Kari and Chris Durham	Norman and Suzanne Metcalfe		



PURPOSE IN ACTION

In 2022, Orange County companies stepped up for their community as enthusiastic volunteers and through generous funding for workplace giving campaigns, sponsorships and grants.

Meet three corporate partner leaders driving purpose in their companies for the good



MIKE CZACH

Senior Human Resources Specialist, Ware Malcomb

According to Mike, when someone comes to work at Ware Malcomb, it's not long before they find out about United Way. For 25 years, the firm has been a supporter and partner. "As engineers, architects and designers, we're building and innovating concepts for our clients. And we're given an opportunity to volunteer with an organization that's innovating and finding creative ways to house people through United to End Homelessness. We've embraced our partnership with United Way as part of our ethos. It gives us something to be excited about and it makes everyone feel like their job is attached to a kind of calling."



BEN ALVARADO

Executive Vice President, California Bank & Trust

Ben believes community involvement creates fulfillment—he says it can give fire to an employee's purpose. The bank's annual Give Week is a friendly competition between the branches. Drives to collect food, clothing and supplies strengthen teams and promote volunteerism. Plus, they generate buzz, great pictures and a lot of camaraderie. He explains, "When I ask people what's most important about their job, it's never how much money they make. It's about relationships and how they've impacted others. When your business has a purpose and you align your activities with the purpose, you get this fulfillment."

of our community.



AMANDA FOWLER

Executive Director, Edwards Lifesciences Foundation

A global company can make its giving strategy relevant locally by being a meaningful partner in the community and contributing more than it takes, according to Amanda. Edwards innovated the first replacement heart valve right here in OC over 60 years ago and has been helping humanity ever since. “The United Way ambassadors on our campus raise their hands sky high to contribute to community impact. It gives us purpose and a commitment to something bigger.” When asked about corporate social responsibility, she replies, “I don’t use the R word. This is corporate ‘get to do.’ We want to do it. It’s inspiring and contagious. And it works.”



CSR Strategy Workshop

Our multi-day corporate social responsibility workshop series offered senior leaders the opportunity to develop and explore their company’s purpose.



Social Impact Networking

Social Impact Networking Mixers were new this year and offered a fun way for corporate leaders to learn CSR best practices and boost employee engagement through an annual purpose plan while providing a networking space.



Workplace Campaign Training

Local employees became more effective fundraisers after attending our workplace campaign trainings where they built skills in planning roadmaps for success and implementing best practices.

CORPORATE, FOUNDATION AND OTHER FUNDING PARTNERS

Showing the Way with Purpose

ACCO Engineered Systems	Chevron Corporation	Fifth Third Bank
Alcon Labs	City National Bank	First Foundation Bank
Alta Resources	City of Dana Point	FirstService Residential California, LLC
Amazon – Orange County	City of Hope	Fluor
American Advisors Group	City of Irvine	Ford Motor Company
Antis Roofing and Waterproofing	City of Mission Viejo	Fountain Valley Regional Hospital
Armanino LLP	City of Santa Ana	Frome Family Foundation
ARMS Business Solutions	Comerica Bank, Inc.	Garden Grove Unified School District
Assurant Specialty Property	Commercial Bank of California	Gibson, Dunn & Crutcher LLP
AT&T	CopperPoint Insurance Companies	Google Fiber
Automobile Club of Southern California	Costco Wholesale	Hoag Hospital
Avanir Pharmaceuticals	County of Orange	IMRI Information Management Resources
Bank of America	Cox Communications	Ingram Micro
Behr Paint	Crowell & Moring LLP	In-N-Out Burger Foundation
BNY Mellon	Cushman & Wakefield	Insperty
Burns & McDonnell	Dana Point Woman's Club	Internal Revenue Service
Caliber Collision	Deloitte.	ITW – Illinois Tools Works
California Bank & Trust	Disneyland Resort	JLL
California State Employees	Eaton Aerospace	Johnson & Johnson
Capistrano Unified School District	Edwards Lifesciences LLC	JP Morgan Chase & Co.
Capital One Financial Corporation	Enterprise Rent-A-Car	Kaiser Permanente Medical Center
Centene Management Company LLC	Ernst & Young LLP	
	Experian	
	FedEx Corporation	

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 Latham & Watkins LLP
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 Lon V. Smith Foundation
 Myers Family Foundation
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 O'Melveny & Myers LLP
 Orange County Community
 Foundation
 Orange County Department
 of Education
 Orange County Fire Authority
 Orange County
 Transportation Authority
 Pacific Life Foundation
 Pacific Life Insurance Company
 Pacific Premier Bank
 Pacific Western Bank
 Paul Hastings

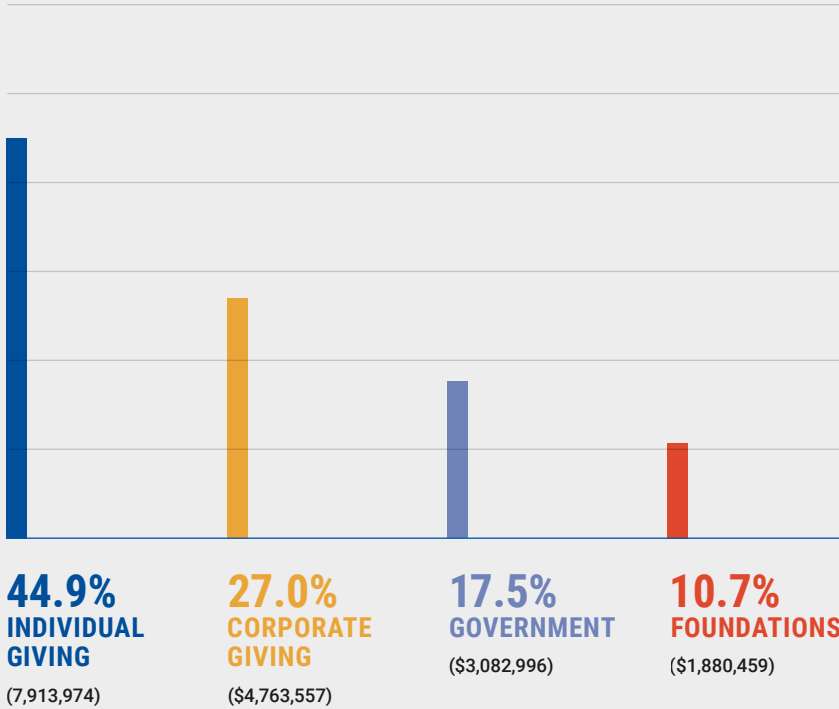
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 SPEC Services Inc.
 St. Joseph Community
 Partnership Fund
 St. Mark Presbyterian Church
 State of California
 Synchrony Financial

Tarbox Family Offices
 Target Corporation
 Tarsadia Foundation
 Team Fishel
 The Masson Family Foundation
 The Owl Foundation
 The Podlich Family Fund
 The Word & Brown Companies
 Timken
 TJ Maxx Division, TJX Companies
 Troutman Pepper
 Truist
 UC Irvine Health
 UniHealth Foundation
 Union Bank
 UnitedHealthcare
 University of California, Irvine
 UPS West Region
 US Bank
 Ware Malcomb
 Wells Fargo
 Western National Group
 Zions Bank

THAT'S THE OC WAY!

IN 2022, ORANGE COUNTY UNITED WAY'S REVENUE OF \$68,066,360 ALLOWED US TO DO MORE FOR OUR COMMUNITY.

BREAKDOWN OF REGULAR FUNDING STREAM



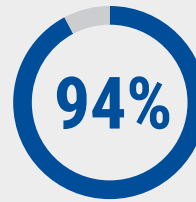
\$17,640,986 Regular Funding Streams
(Breakdown shown above)

\$2,997,886 CDC Health Equity Grant

\$47,427,488 Pandemic-Related Emergency Rental Assistance Funding

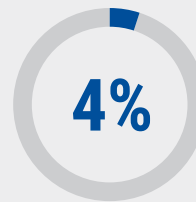
\$68,066,360
2022 TOTAL REVENUE SUPPORT

Investments in programs and people



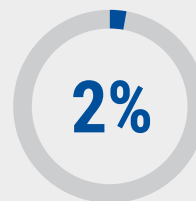
GRANTS AND PROGRAMS

Includes issue expertise and research, program development and implementation, funding of nonprofit and educational service providers, community leadership and partnerships, public awareness and community education, advocacy, volunteer and donor engagement and support staffing. In 2022, also includes extraordinary funding for Emergency Rental Assistance.



FUNDRAISING

Includes the costs associated with raising money to support our mission.



ADMINISTRATION

Includes finance, IT and administrative services that support our mission.

2021–2022 Statements of Financial Highlights

	6/30/2021	6/30/2022
STATEMENT OF FINANCIAL POSITION		
Total Assets	\$35,809,028	\$28,387,789
Less Total Liabilities	\$(9,639,244)	\$(4,902,946)
Total Net Assets	\$26,169,784	\$23,484,843
STATEMENT OF ACTIVITIES		
Annual Campaign	\$17,995,967	\$17,368,829
Emergency Rental Assistance	\$29,439,690	\$47,427,488
CDC Health Equity Initiative Grant	—	\$2,997,886
Endowment Gifts	\$34,478	\$10,638
In-Kind	—	\$261,519
Total Annual Campaign	\$47,470,135	\$68,066,360
Other Income	\$5,247,483	\$(2,037,372)
Provision for Uncollectible Pledges	\$(667,120)	\$(262,308)
Total Revenue	\$52,050,498	\$65,766,679
Grants and Programs	\$40,419,295	\$60,024,191
Donor Directed Giving	\$4,740,625	\$4,200,849
Fundraising, Administration and General	\$3,844,202	\$4,226,581
Total Grants, Directed Giving and Expenses	\$49,004,122	\$68,451,621
Change in Net Assets	\$3,046,376	\$(2,684,941)
Net Assets – Beginning of Year	\$23,123,408	\$26,169,784
Net Assets – End of Year	\$26,169,784	\$23,484,843

**WHAT'S YOUR PURPOSE? JOIN US.
TOGETHER, WE CAN DO MORE TO
STRENGTHEN OUR COMMUNITY.**



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UnitedWayOC.org