

BUILDING A BOLDER FUTURE IN SAN JOAQUIN COUNTY



UNITED WAY
San Joaquin County



United for good.

2024

IMPACT
REPORT



OUR YEAR IN REVIEW. UNITED FOR GOOD

DEAR ESTEEMED COMMUNITY,

2024 was a significant year for United Way of San Joaquin County. Whether it was our recommitment to building the capacity of our over 2000 nonprofits across our county or building stronger economic mobility for our low-income residents with new programming-

TOGETHER WE WORKED WITH OUR CITY, COUNTY AND UNSELFISH NONPROFIT PARTNERS TO CREATE CHANGE. WE DID NOT DO IT ALONE.

And if one can define UWSJC's "Why" it is that we are United for Good. While it might be our new brand mantra, it is so much more than a phrase. These words provide us with hope and gratitude to do the work we do each day. It means that our single reason for what we do and why is about driving towards good and fulfilling the needs of our nonprofits, our donors, partners and our community so they can generate impactful social impact. That is why we exist.

Our goal is creating and collectively working together, thriving united towards healthier, stronger, and safer neighborhoods, people and systems. Our Real Cost Measure Report was our dashboard highlighting the real life challenges our neighbors experienced, and our actions followed. We went from knowing to doing. Doing more to reduce poverty, homelessness and strengthening our nonprofits with the tools and systems they need to thrive.

2024 was a testament to our staff and board's commitment to community mobilization and convening which generated wins for our donors, nonprofits, employers and our partners.

WE WANT TO CELEBRATE THIS YEAR WITH THIS IMPACT REPORT WHICH WE HOPE WILL INSPIRE OUR TRAJECTORY TOWARDS OUR 100-YEAR ANNIVERSARY IN 2026.

UWJSC is now 99 years young, and we cannot wait to see where we go in the future.

ALL I CAN SAY - IT WAS OUR BOLDEST YEAR YET.



Kristin Birtwhistle
President and CEO

IN MEMORIAM: **ANDY PROKOP** FRIEND, FATHER, LEADER, VETERAN, HUMANITARIAN



Andy Prokop, former CEO of the United Way of San Joaquin family, a cherished friend, leader, veteran, and humanitarian left us for the heavens on January 11, 2025, surrounded by his loving family.

HIS PASSING MARKS THE LOSS OF ONE OF THE HUMBLEST AND KINDEST INDIVIDUALS WE HAVE EVER KNOWN.

A MAN WHO GAVE SO MUCH OF HIMSELF, WITH BOTH HEART AND HANDS, TO MAKE OUR COMMUNITIES ACROSS SAN JOAQUIN COUNTY STRONGER AND BETTER.

Andy was a giant leader of immense integrity who lifted up others through his life's work, whether in business, nonprofit endeavors, or simply through his daily interactions with people seeking a better life.

He always encouraged those around him with his signature optimism-of always positive (AP) often saying,

"This is the first day of the rest of our

lives" with **HIS SIGNATURE SMILE AND UNWAVERING POSITIVITY** which left a lasting impression on all who had the privilege to know him.

A memorial scholarship will be created in his name in 2025 benefiting our military veterans.

HEADING INTO OUR CENTENNIAL YEAR— A 100 YEARS OF SERVICE TO SAN JOAQUIN COUNTY.



As United Way of San Joaquin County approaches its 100th anniversary, we are reflecting on the incredible journey we've had in our community and looking ahead to the next century of service. In 2024, we focused on revitalizing our organization to better align with the evolving needs of our community and the expectations of our supporters.

One key initiative was refreshing our brand to make it more meaningful and recognizable. Our new branding,

“UNITED FOR GOOD,” EMBODIES OUR COMMITMENT TO CREATING LASTING CHANGE AND INSPIRING COLLECTIVE ACTION FOR THE BETTERMENT OF ALL.

This shift is part of a broader effort to ensure that both our donors and community members fully understand who we are, what we stand for, and how we are making a difference. In addition to this rebranding effort, we took the time to develop a clear value statement that

DEFINES WHAT WE STAND FOR AND THE PRINCIPLES THAT GUIDE US.

We also listened closely to our donors, supporters, and community members through surveys to gain insights into their perceptions of our work. We asked important questions about how they feel about our impact and where they see opportunities for us to grow and improve. This feedback is invaluable as it helps us strengthen our organization and ensures we remain focused on addressing the most pressing needs in San Joaquin County.

As we move forward into our second century of service, we are more committed than ever to showing up for our community and driving meaningful change.

THANK YOU TO ALL WHO HAVE SUPPORTED US ON THIS JOURNEY.

WE ARE EXCITED FOR WHAT THE FUTURE HOLDS AS WE CONTINUE TO WORK TOGETHER, UNITED FOR GOOD.



UNITED WAY OF SAN JOAQUIN COUNTY CORE VALUES

INTEGRITY

IMPACT

CONVENER

ADVOCACY

SOCIAL CHANGE

COMMUNITY DRIVEN

HOPE

EXPANDING ACCESS TO FINANCIAL WELLNESS:

CALIFORNIA EARNED INCOME TAX CREDITS AND VOLUNTEER INCOME TAX ASSISTANCE SERVICES

ADDRESSING POVERTY THROUGH TAX EDUCATION AND ASSISTANCE

UWSJC made an intentional commitment to expand the 20-year old Volunteer Income Tax Assistance Program (VITA). With partnerships from Health Plan of San Joaquin, Stanislaus State Stockton Branch Campus, El Concilio, Community partnerships for Families and 211 from Family Resource Center we have built a coalition that together will allow us to triple the numbers of tax refunds to help low-income families or those making \$64K or less.

STUDIES SHOW THAT:

The poverty rate in California rose



16.4%
California Poverty Rate



5 MILLION
LIVING BELOW POVERTY LINE



66,494 HOUSEHOLDS
UNABLE TO MEET BASIC NEEDS IN SJC.

dramatically, from 11% in 2021 to 16.4% in 2022. By early 2023, approximately 5 million Californians were living below the poverty line. Locally, in San Joaquin County, the numbers are equally alarming — 66,494 households (34%) are unable to meet basic needs such as housing, food, health care, and more.

This staggering reality underscores the urgent need for programs like the VITA program which is critical in closing this gap by helping residents access life-changing resources such as the Earned Income Tax Credit (EITC) and the California Earned Income Tax Credit (CalEITC). By increasing education and access to free tax preparation services, we can help these families regain stability and improve their quality of life, one refund at a time.

2023-2024 SIC VITA IMPACT

Federal Tax Returns Completed:	Additional CTC:
1,246	\$273,078
Total Federal Refunds:	Educational Credit:
\$1,487,108	\$22,789
Federal EITC:	Total State Refunds:
\$605,238	\$415,078
Child Tax Credits:	State EITC:
\$250,389	\$136,710
Total Refunds and Tax Credits:	
\$3,190,390	

2024 VITA IMPACT IN SJC

1,246

TAX RETURNS
FILED

\$3.1 MILLION

TAX CREDITS
& REFUNDS



STANISLAUS STATE'S VITA SITE successfully filed over 433 tax returns, securing over \$955,375 in tax credits and refunds for local residents. This influx of financial resources directly contributed to the economic stability of families, allowing them to better support themselves and their loved ones.

The opening of Stanislaus State's Stockton Campus and Health Plan of San Joaquin VITA Sites has been a significant addition to the program's overall success and impact in San Joaquin County.

Their contributions played a vital role in helping the VITA program bring over \$3.1 million back into the community through refunds and tax credits across all VITA sites in the county.

THE POWER OF WORKPLACE GIVING CAMPAIGNS:

OVER \$100M RAISED SINCE OUR FOUNDING IN 1926.

United Way of San Joaquin County's workplace giving campaigns have long served as a powerful vehicle for social change. In 2024 the campaigns raised close to \$1M, benefitting over 300 nonprofits throughout San Joaquin County. The funds raised through workplace giving are vital, as they provide unrestricted resources that allow our nonprofit community to respond to the most pressing needs in our community with flexibility and urgency.

UWSJC has consistently led the way in raising the most funds through workplace giving campaigns across the Central Valley. This achievement underscores the critical role these campaigns play in supporting our nonprofit community.

FUNDS RAISED IN 2024:

+ 3,000 DONORS | CLOSE TO \$1 MILLION DOLLARS!

2024-2025 PARTICIPATING AGENCIES

- Bank of Stockton
- BNSF Railway
- California Water Service Company
- Child Abuse Prevention Council
- City of Stockton
- City of Tracy
- Community West Bank
- Costco Wholesale
- Dorfman Milano Company, Inc
- El Concilio of California
- Family Resource Center
- Farmers & Merchants Bank
- Golden Bear Insurance
- Greater Stockton Chamber of Commerce
- Haggerty Construction, Inc.
- Health Plan of San Joaquin
- Knapheide Truck Equipment Center Sacramento
- Neumiller & Beardslee
- Oak Valley Community Bank
- Our Promise State Campaign
- Pacific Home Care Services
- Port of Stockton
- San Joaquin County
- San Joaquin County Office of Education
- Tracy Logistics-C&S Wholesale
- University of Pacific
- Visit Stockton





BUILDING STRONGER COMMUNITIES:

THE NONPROFIT LEADERSHIP COLLABORATIVE (NLC) EXPANDS TO LODI AND SOUTH COUNTY.

In 2024, UWSJC officially launched the Lodi and South County Nonprofit Leadership Alliances, an initiative designed to unite nonprofit leaders across our communities. The alliances are an extension of the Nonprofit Leadership Collaborative (NLC), which is a trusted network of nonprofit leaders who gather to engage in meaningful dialogue, exchange resources, and strengthen sector-wide collaboration.

By coming together as one cohesive unit, these alliances are empowered to advocate for the resources and support needed to meet the needs of the communities they serve. Additionally, these groups play a crucial role in ensuring that city and county leaders are actively engaged with the nonprofit sector, integrating our voices and perspectives into their decision-making processes. Through this collaboration, we're working to ensure that the nonprofit community is a strong, unified partner in shaping the future of our region.



52 NONPROFITS SINCE 2023



NONPROFIT CAPACITY BUILDING PROGRAM (NCBP)

A PARTNERSHIP BETWEEN UNITED WAY OF SAN JOAQUIN COUNTY AND THE CITY OF STOCKTON TO STRENGTHEN LOCAL NONPROFITS.

United Way of San Joaquin County's Nonprofit Capacity Building program is a unique and innovative approach to creating stronger and sustainable nonprofits across San Joaquin County. With the City of Stockton as our close ally and partner on this endeavor it is noted that you cannot have a healthy community without healthy nonprofits.

Since its inception in 2022, the NCBP has established a powerful curriculum that advances the mission of selected nonprofits, both small and large. The nine-month program, instructed by a team of expert nonprofit advisors, has yielded significant results from nonprofits gaining greater financial acumen to strengthening governance support for Boards to rebranding the image of each agency.

Many nonprofits since graduating from the program have expanded their financial strength, redesigned internal systems, reaching far greater percentage of needy families and individuals due to expanded staff or operations and are attracting more donors than ever before. All reported by the agencies themselves.

“After every session, my team has come back with new and innovative ideas about their work as well as where our organization can go moving forward.”
- El Concilio

“Participating in the NCBP has given me the knowledge, tools and confidence to level up. This experience has opened doors to endless possibilities for growth and sustainability. For this, I am grateful.”
- Wide Horizons, Inc.

THE FOUR PILLARS



Governance



Branding and Community
Engagement



Revenue
Structure



Operational
Infrastructure

100% of participants reported an increased understanding of how to better engage their community, donors, & clients.

75% were already making changes to how their boards run at program mid-point.

GRIT WORKSHOP SERIES

The workshops provided a dynamic platform for individuals from all walks of life to **LEARN, GROW, AND CONNECT.**

PURPOSE: The GRIT series was designed to provide practical, hands-on expert led sessions to develop stronger professional and personal skills. Be it for boards, budding CEO's, middle management teams or college students, United Way of San Joaquin County uniquely believes in the provision of education that makes a difference for others. From topics on public speaking to grant writing, to designing on Canva or financial planning, over 300 participants gained the confidence and desire to apply new skills.

IMPACT:

- Participants reported increased confidence and a desire to apply new skills to their workplaces and communities.
- Highly positive feedback indicates strong demand for future sessions.

SPONSORS: *GRIT Series was made possible by the help of our sponsors*

**JUNIOR LEAGUE OF
SAN JOAQUIN COUNTY**



**Health Plan
of San Joaquin**

300 PARTICIPANTS

We had over 300 participants in our first year of the GRIT series, many of which received tickets through our community partners who donated to support the program (HPSJ, FRC, and Junior League), or are members of Eleanor by Women united or the Nonprofit Capacity Building Program. **98%** of survey responses indicating extremely satisfied with their overall experience!

The
GRIT
series
WHERE PASSION MEETS PERSEVERANCE



“The GRIT Series gave me practical tools I could apply immediately to my nonprofit.”

— Workshop Participant





THE NEST:

A HUB FOR NONPROFIT GROWTH AND COLLABORATION

In 2024, The NEST (Nonprofit Enterprise Support Team) became more than just a co-working space—it became a trusted hub for nonprofit collaboration and growth. Over 25 local organizations, such as Black Urban Farmers (BUFA), Dignity Health, Little Manila Rising, Unbound Stockton, and the Stockton Symphony, used the space to host meetings, retreats, and events that advanced their missions.

We also supported meaningful programming, including youth-focused Mental Health First Aid trainings with Inspire Me, Inc. and a grant writing workshop that helped nonprofits build critical skills for sustainability.

The impact goes beyond usage. Every gathering, retreat, and conversation at The NEST this year contributed to a stronger, more connected nonprofit community. It became a place where ideas turned into action, where missions gained momentum, and where leaders found support among peers.

THE NEST CONTINUES TO GROW, AND WITH IT, SO DOES THE IMPACT OF THE ORGANIZATIONS WE SERVE.

“ The NEST created a perfect setup for our recent training event. Great decor, clean & neat rooms, beverage and snacks provided. Wifi and audio-visual needs met. Positive experience! ”



ELEANOR BY WOMEN UNITED

Eleanor by Women United (EWU) is more than just an affinity group, it is a movement rooted in connection, collaboration, and community. As a key initiative of United Way, EWU is a membership based program dedicated to empowering and inspiring women and our male allies across San Joaquin County by creating intentional spaces where women can come together to grow, learn, and lead.

We believe that when women support one another, entire communities thrive. That's why EWU exists: to provide women with a safe, inclusive environment to celebrate each other's successes, learn from diverse experiences, and champion one another in both personal and professional spheres. From Lodi to Tracy, our programming has entertained, educated, and meaningfully connected women in ways that spark lasting relationships and community impact.

Over the past year, EWU has hosted events that brought together hundreds of women—sparking new friendships, professional collaborations, and personal growth. Our members have played a vital role in advancing diversity, equity, and inclusion in their communities and industries, while also mentoring and uplifting the next generation of local women leaders.

EWU is lighting the way for a more inclusive, connected, and empowered future—one woman, one city, and one story at a time.

I joined EWU because I believe in the strength that comes from women uplifting each other and working together to make a positive impact.

- Alexis Wilbur, SJC Family Justice Center



UNITED WAY ACROSS OUR COMMUNITY

POWER OF ONE



SIERRA VISTA EASTER BASKET GIVEAWAY



BACK PACK GIVEAWAY



CAPITOL DAY



MANTECA CHAMBER
NONPROFIT
OF THE YEAR



BOARD MEMBERS

Bradley Burrell, Board Chair
Stockton Police Department

Devinder Grewal, Co-Chair
Kaiser Permanente

Andrea Andrade
JPMorgan Chase Bank

Robin Baglietto
Robin Angela Coaching
& Consulting

Anna Maria Carter
Great Wolf Lodge
Northern California

Vena Ford
Health Plan of San Joaquin

Phillip Merlo
San Joaquin County Historical
Society & Museum

Carol Ornelas
Visionary Home Builders
of California

Carmen Padilla
El Concilio California

Lauren Schoenthaler
University of the Pacific

Nelly Valdovinos
Farmers & Merchants Bank of
Central California



UNITED WAY OF SJC STAFF

Kristen Birtwhistle, CEO & President

Donna Ng, Donor Relations Director

Jose R. Serrano, Director of Advancement

Najja Haynes, Director of Social Impact &
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Sam Prak, Director of Finance

Christina Bastida, Director of Community Health

Sayani Sosa, Senior Administrative Coordinator

Elizabeth Talavera, NEST Coordinator

Denise Hernandez, Special Projects Coordinator

2024

**IMPACT
REPORT**



UNITED WAY
San Joaquin County