



The Heritage Club Celebrates 26 Years



Three Generations
Jeff, Steve & Eric Boehm

For 26 years United Way of Santa Barbara County has honored those people who have made legacy gifts through their estate plans, by bringing them together each year for a special event. This year the Annual Heritage Club Appreciation Luncheon took place at the **Museum Café** at the **Santa Barbara Museum of Art** on Wednesday, June 1, 2011. Heritage Club members and their guests were treated to a very intimate luncheon where they enjoyed the company of like-minded philanthropists.

A delicious lunch was prepared by **Chef Brenda Simon** and The Museum Café staff. After the luncheon, Heritage Club members were treated to a private, docent-guided tour of the museum. This event was generously underwritten by **Boehm Biography Group**, an organization founded by Heritage Club member **Eric Boehm**, his son Steven and his grandson Jeff to help people preserve their heritage and create meaningful legacies.

Many thanks to our sponsor, Boehm Biography Group

Improving the lives of Children, Seniors and their Families

The Heritage Club was established in 1982 to honor those forward-thinking individuals who have made provisions to leave their legacy to this community as part of their overall estate plan. Through wisely planned gifts, they have extended their United Way support for generations to come. Their gifts come in many forms, including Charitable Remainder Trusts, Gift Annuities, Donor Advised Funds, Pooled Income Funds, Bequests, and gifts of Retirement Accounts or Life Insurance Policies. Heritage Club members are recognized on the Wall of Honor which is a perpetual plaque located in the main conference room of the Stuart Taylor Community Center.



Mike & Jennifer Bergquist

United Way's Endowment and Gift Planning Services Program, under the guidance of a premier group of volunteer estate and financial planning professionals, offers a variety of techniques which are individually tailored to meet the philanthropic desires of our donors. These gifts are invested in at least one of six Endowment Funds, which provide a solid foundation of perpetual support for United Way of Santa Barbara County's unique and innovative programs which are improving the lives of children, families, and seniors in our community.

To learn more about the Heritage Club, please contact Judy Goodbody, CFRE, CRTP Gift Planning Services Officer, at (805) 965-8591 ext.120, or log on to our website at www.unitedwaysb.org/giftplanning

The Power of the Heritage Club Legacy



Maylene Cook, Diane Doiron
& Bill Cook

Diane Doiron, Endowment and Gift Planning Services Committee Chair, welcomed United Way's Heritage Club members to the 26th annual gathering. Diane spoke of her personal commitment to United Way and recognized two Heritage Club members, **Earl Damitz** and **Tom Brashears** for their outstanding support of United Way. Both men were honored in 2003 for 50 Years of Volunteer Service, and as Outstanding Legacy Supporters in 2010 and 2011 (respectively). Both men served with Diane over the years on the Endowment Committee, and as members of United Way's Board of Directors. Diane expressed her deepest appreciation to all the Heritage Club members for leaving their legacy to the people of this community through United Way's Endowment.

Producing Measurable Results In Our Community

Paul Didier, United Way's President and CEO, shared the remarkable results made over the past year. Through the Power of Partnership Initiative, people of this community agreed that the three most important long-term goals for Santa Barbara County are Education, Financial Stability and Health. Paul explained how United Way is setting the standard to achieve these goals in our community.



Paul Didier & Tim Gamble

Education: What we learned is that education is multi-faceted, and not just about a school-based solution. Much of a child's education takes place outside the classroom, and to meet those needs we implemented components such as our parent-education program where we meet in people's back yards, set up tents and chairs, to conduct early education programs. More than 100 parents came to learn about effective parenting skills, positive disciplining, how to be their child's first and best advocate for accelerating their educational progress. The early, one-year results are already quite positive, and United Way is in the process of determining what other issues we can address in partnership with our schools throughout Santa Barbara County.



Merrilyn & Earl Damitz

United For Literacy is United Way's multi-pronged initiative to address the education goals of the community, and we are already seeing very positive results. To give you an example – when 113 students, 3rd through 6th graders started the **Reading Plus Program**, only 1% of the students were reading at grade level. Fifteen weeks later 60% of the students were reading at grade level or above, and the average gain was 2.3 grade levels of reading performance. The Hope School District followed our recommendations most closely, and their results were staggering. 53 students participated at Vieja Valley School, and in fifteen weeks, 51 of the 53 students had improved their reading between 2 and 6 grade levels.

Due to budget cuts this year, there is no summer school for any Santa Barbara County schools. United Way negotiated with the publisher of the on-line **Reading Plus** licenses to allow students and their parents to continue using the program along with a lending library provided by United Way, which will allow students to perform reading improvement during the summer from anywhere in the world.

Fun in the Sun (FITS), United Way's summer enrichment program for poverty level children and their parents is in its fourteenth year. 239 children participated last summer. These 3rd through 9th grade students were tested at the onset of the program and tracked each week at four different **FITS** sites.

Results: This United Way program set a new national benchmark with 83% of the children improving their reading by 1.8 grade levels during the seven week **FITS** program. As a result, United Way of Santa Barbara County was selected as one of the 10 national finalists for the prestigious National Summer Learning Institute's Award of Excellence.

From that information, United Way is building partnerships and programs that are going to change the lives of thousands of people every single year, making those people contributors to our community rather than users of our community's limited resources.

Visit our website at www.unitedwaysb.org

HERITAGE HIGHLIGHT NEWS

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