



# BUILDING AN EQUITABLE RECOVERY

FY2021  
ANNUAL  
REPORT



United Way of the  
National Capital Area

[UnitedWayNCA.org](https://UnitedWayNCA.org)

WELCOME

## LETTER FROM THE CEO



It's hard to believe we are still navigating the COVID-19 global pandemic as well as the impact and outcomes of this crisis. One thing we know for certain, is that the need for an equitable recovery is even greater than before. At your United Way, we are committed to fighting for every single one of our neighbors to have access to the health, education and economic opportunity they need—especially as we look ahead post-pandemic and beyond.

Your United Way of the National Capital Area has always been centered around providing the tools, resources and capacity for individuals and families in our community to thrive, even during difficult times. As you can imagine, many in our region have been completely devastated by the pandemic, and the long-existing systems of inequity have only been made worse. We've seen exponentially higher levels of food and housing insecurity as well as unemployment and education gaps. As we continue to navigate these challenges, where we go from here will be determined by how we ensure everyone has the access they need to thrive in a post-pandemic world.

Last year, a fifth location was added to United Way NCA's regional network of Financial Empowerment Centers (FECs). Together with M&T Bank and Coalition for the Advancement of Financial Education (CAFE Montgomery), we opened a new United Way NCA Financial Empowerment Center (FEC) at Montgomery County. All FEC locations in our region continued to operate virtually, providing free financial counseling and coaching to help residents navigate furloughs, layoffs or reductions in income.

We also launched a comprehensive program to reduce COVID-19 infection and death rates in Black and Brown communities in the National Capital Area. The program began with United Way NCA's participation in the Choose Healthy Life Black Clergy Action Plan (CHL)—a historic multicity initiative that aims to raise awareness and educate the Black community on COVID-19 and other health disparities; develop infrastructure and advocacy; and, most importantly, provide access to COVID-19 testing for high-risk communities through the Black church, the oldest and most trusted institution in the Black community. We convened Quest Diagnostics, CareFirst BlueCross BlueShield (CareFirst) and Deloitte, all of whom made significant investments for the distribution of COVID-19 testing and vaccinations throughout the region while removing barriers by providing free transportation and education. With these new investments, the program has expanded into a region-wide effort to ensure equitable access to COVID-19 resources.

Your United Way also brought together local partners to provide much-needed resources to those at risk of or experiencing homelessness, as well as our Asset Limited, Income Constrained, Employed (ALICE) population. ALICE represents the growing number

of individuals and families who are working but are unable to afford the basic necessities. A total of 5,200 essential kits were distributed during the week of our annual Project Community Connect (PCC) across D.C., Maryland and Virginia. The kits distributed included healthy snacks, hygiene products and warm clothing items. While it may sound simple, these kits are strongly connected to the overall health, education and economic opportunity of residents throughout the National Capital Area.

As we continue to seek ways to provide our community with the support they need, there is one thing that has remained clear: this work requires equity at the center of it, and it requires all of us. At your United Way, we believe in strength in numbers and bringing to the table the expertise, thought leadership and resources to organize around the most pressing issues of the moment. This work cannot be done alone because there is no one simple solution to each issue. However, what we believe to be true at United Way NCA is we need to Live United in the equity movement to create a better future—one where communities have their basic needs met and we are bridging the divides in our economy and education systems.

While there is much that has been done in the last year, this is only the beginning. I believe that the work that lies ahead will be the most significant and transformational in our lifetime. We invite you to join us on this journey building an equitable recovery and future for all.

When none are ignored, all will thrive.



President & CEO,  
United Way of the National Capital Area

# UNITED WAY NCA LEADS THE REGIONAL POST-PANDEMIC TRANSFORMATION



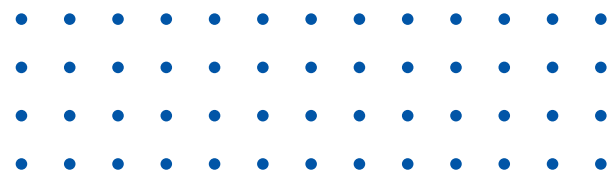
In these unprecedented times, we pressed deeper into the heart of issues surrounding our community. From systemic inequities that exist in our community to the challenges enveloping individuals and families around the pandemic, United Way NCA is committed to the hard work and investment to transform lives in our region. It is from this commitment that we are happy to share we are not alone. Your United Way was honored to share that novelist and venture philanthropist, MacKenzie Scott, invested \$20 million to the organization as part of her \$4.2 billion investment in 384 high-performing organizations throughout the country. As we look to continue our work to bridge the gaps and inequities that exist across the region, this investment comes at a critical time for us to continue to meet the immediate and long-term recovery of the National Capital Area. Every future investment into the community beyond this generous donation will allow us to keep the momentum going.

MacKenzie Scott's generous investment is pivotal in laying the groundwork for United Way NCA's next five-year strategic plan; committed to providing equitable access to health care, dismantling barriers to housing, bolstering economic advancement and opportunities, enriching education in underserved communities, bridging racial and wealth divides and making sure that every family and individual can obtain basic essentials to live a healthy and happy life.

We are humbled by the generosity of Ms. Scott and all of our partners, volunteers, and donors who continue to believe in the work we do. With her investment and every investment that follows, we reach deeper into our ability to fundamentally improve the lives of everyone in our region.

**"THE WORK THAT LIES AHEAD WILL BE SOME OF THE MOST SIGNIFICANT AND TRANSFORMATIONAL IN OUR LIFETIME, BUT WE ARE JUST AT THE BEGINNING."**

— Rosie Allen-Herring, President & CEO of United Way NCA





# UNITED WAY NCA LAUNCHES COMPREHENSIVE PROGRAM TO REDUCE COVID-19 INFECTION AND DEATH RATES IN BLACK AND BROWN COMMUNITIES IN THE DC AREA

In response to the pandemic, United Way of the National Capital Area (United Way NCA) launched a comprehensive expansion program to reduce the number of COVID-19 cases and death rates affecting Black and Brown communities throughout the DC area. United Way NCA partnered with Quest Diagnostics, CareFirst BlueCross BlueShield (CareFirst) and Deloitte, all of whom made significant investments for equitable access to and the distribution of COVID-19 testing and vaccinations throughout the region while removing barriers by providing free transportation and education.

This program uses a four-pronged approach to reduce COVID-19 cases in Black and Brown communities, including testing, vaccinations, free transportation, and education and awareness. It began with United Way NCA's participation in the Choose Healthy Life Black Clergy Action Plan (CHL)—a historic multi-city initiative that aims to raise awareness and educate the Black community on COVID-19 and other health disparities, develop infrastructure and advocacy and, most importantly, provide access to COVID-19 testing for high-risk communities through the Black church, the oldest and most trusted institution in the Black community. Ultimately, the goal of United Way NCA's expansion program ensures no one is left behind when it comes to education and access.

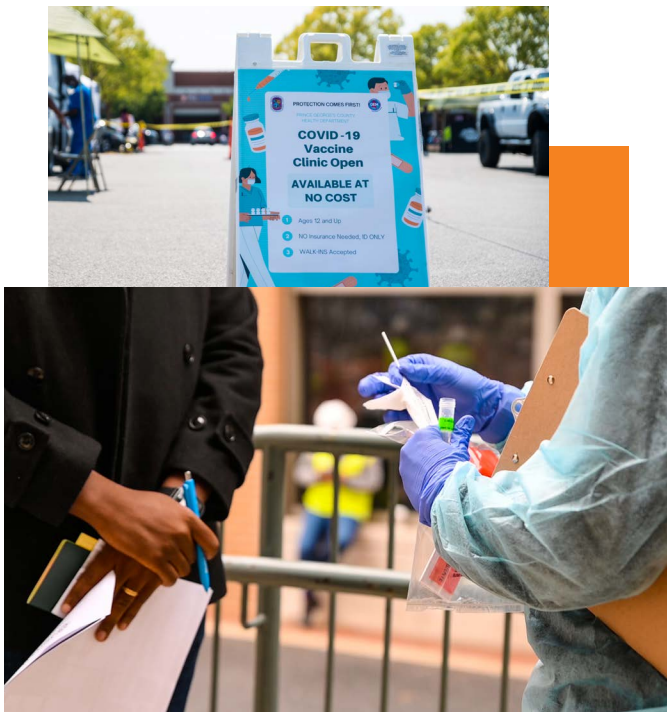
Starting in February 2021 with an initial investment from Quest Diagnostics and the Quest Diagnostics Foundation, United Way NCA identify and partnered with 10 Black churches in Maryland and DC to support uninsured or underinsured African Americans through community mobilization. Each church is staffed with a Public Health Navigator and led by a Health Navigator Supervisor from Mary's Center here in DC.

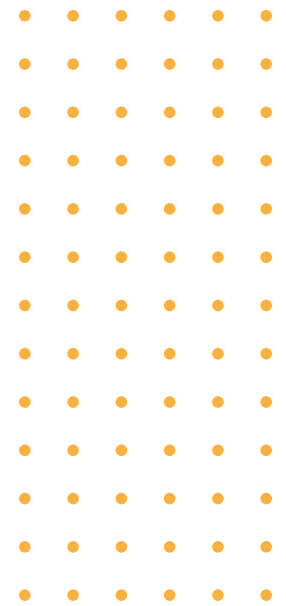
Additionally, CareFirst, as part of its "Better Together Campaign," joined United Way NCA's effort to increase the availability of vaccinations throughout the Washington, DC, Maryland and Northern Virginia regions. CareFirst's long-term goal is to combat other chronic diseases, such as diabetes and hypertension, facing communities impacted by racial inequities and build on United Way NCA's current program to close the equity gap in health care beyond COVID-19.

Deloitte's investment provides capacity to expand vaccinations beyond the 10 churches to cover more of the region, amplify education and awareness and eliminate access barriers by providing free rides through United Way's Ride United program for those in need of transportation to testing and vaccination sites

We are incredibly grateful for the groundswell of investments from our partners in helping to reduce the number of COVID-19 cases in Black and Brown communities across the region. The work we are doing today and moving forward are examples of the actions we're all taking together to provide equitable health care access to those who have been historically under-resourced and ignored."

— Rosie Allen-Herring, President & CEO of United Way NCA







# HOW EXPOSURE TO STEM EDUCATION CHANGED PRINCE GEORGE'S COUNTY STUDENTS' VIEWPOINTS ON TECHNOLOGY



United Way NCA is focused on the education pipeline from middle school to college and/or career success. We work in Title I schools in our area, addressing attendance, behavior, and course performance through our Community Schools program. As part of these efforts, our focus on the middle school to college/career pipeline puts our Asset Limited, Income Constrained, Employed (ALICE) students and their families front and center. ALICE represents the growing number of individuals and families who are working but are unable to afford necessities. Working side-by-side with our partners, we prepare students in targeted, at-risk middle schools to transition successfully to high school and perform at grade level.

When it comes to preparing students to succeed, it's never too early to begin thinking of what one wants to do with their future. United Way NCA knows the data points to middle school as the beginning of the pipeline for students to succeed in college and/or their careers. Early exposure to different fields of work can make all the difference in inspiring students to think about their futures and set goals for themselves.

That's why United Way NCA teamed up with Deloitte's AI Institute for Government to offer a 12-week virtual STEM (Science, Technology, Engineering and Math), one-hour, after-school program for 40 students across eight Title I middle schools that are part of Prince George's County Public Schools Community Schools. The program began in February 2021 and wrapped up in May 2021, just before the start of summer break.

**"THE BIGGEST BENEFIT [OF THE PROGRAM] IS EXPOSURE TO THE AI WORLD, EXPOSURE TO THE WORLD OF TECHNOLOGY, OF OPENING STUDENTS' EYES THAT TECHNOLOGY IS MORE THAN JUST FOR ENTERTAINMENT."**

— Tameka Smallwood, Science Educator Oxon Hill Middle School

## HELPING REDUCE ECONOMIC DISPARITIES DURING TAX SEASON

For many across the country, tax season is a flurry of confusion and anxiety. Taxes can be riddled with complexities, and a heavy lift for many residents in the National Capital Area causing many low wage workers to choose not to file taxes at all. The result is that year after year families lose thousands of dollars in unclaimed benefits. However, in a year unlike any other, where we witnessed many individuals unemployed or underemployed, a sizeable tax return can go a long way in resolving debt, feeding the family or replenishing savings for the remainder of the pandemic.

But accessibility and tax filing do not always go hand in hand. Some tax processors charge hundreds of dollars for a return that takes minutes to file. To maximize the number of families in our region saving money during tax season, United Way NCA convenes its powerful regional network of five Financial Empowerment Centers and over XX Volunteer Income Tax Assistance partners to provide our community with free tax preparation services and guidance on tax credit options at no cost.

Through the VITA program, IRS-certified VITA tax volunteers help qualified community members understand and qualify for the Earned Income Tax Credit (EITC). EITC has been called the most effective U.S. anti-poverty program and is even more important for low-wage workers across the region as they navigate the pandemic. Tax refunds, as a result of the EITC, have

proven instrumental in lifting people out of poverty, going so far as empowering them to put their children through school, get ahead on rent payments, or even become homeowners.

“It is important that we are helping everyone in our community get the most back when they file. Credits like the Earned Income Tax Credit (EITC) can help individuals and families get back thousands of dollars every year— enough money to lift them out of poverty. And without the support of the United Way of the National Capital Area’s VITA locations, we would not be able to reach as many people as we do.”

– United Way NCA VITA Partner





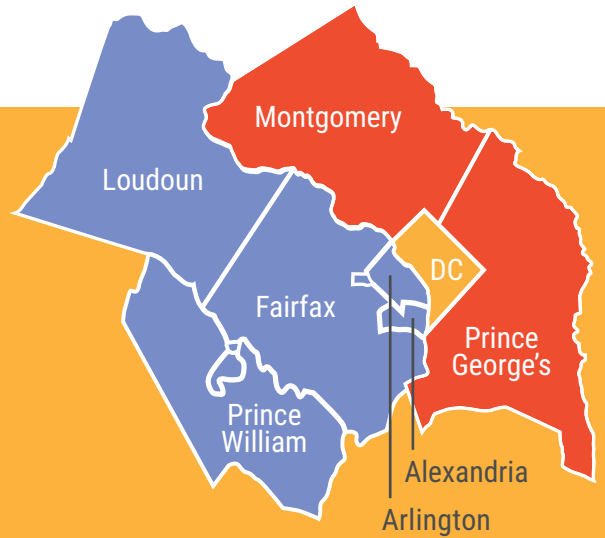


## FY21 IMPACT REPORT



90,013

Number of people impacted



11.5M

\$ in tax refunds



22,778

Number of people that received tax prep and financial services

4.4M

\$ prescription savings

\$4.26M



Number of meals delivered to food-insecure students & families

69,353

Number of students and families served through United Way NCA Health programs



2,391



Number of people vaccinated through Choose Healthy Life program

4,225

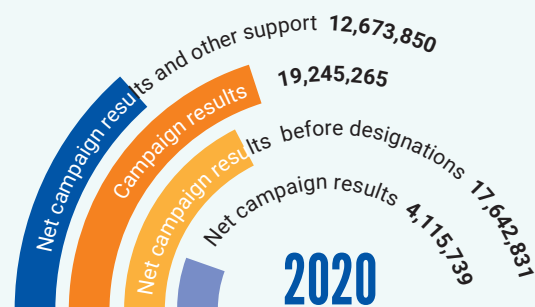
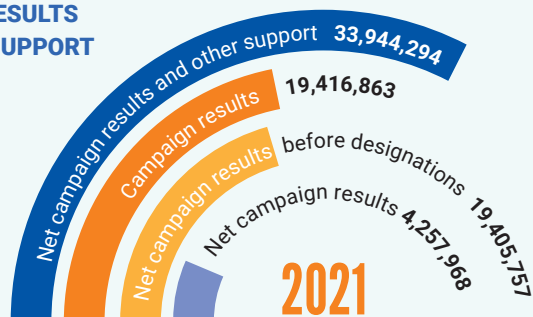
Students served through community schools

5,200



# of essentials kits distributed at annual Project Community Connect (PCC)

## ANNUAL REPORT STATEMENT

Summarized Statements of Activities and Financial Position  
For the Fiscal Years Ended—June 30, 2021, and 2020CAMPAIGN RESULTS  
AND OTHER SUPPORT

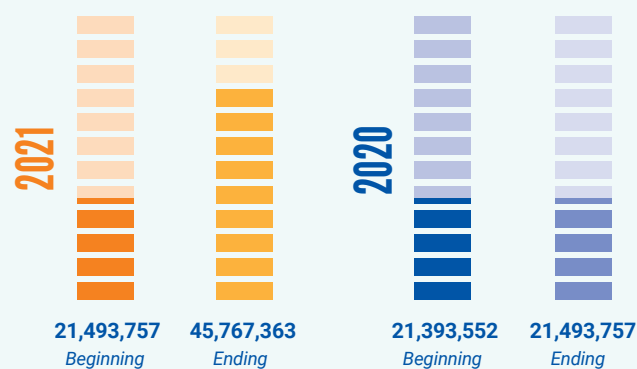
## EXPENSES

	2021	2020
Community impact funds grants, community initiatives and events, community services	6,031,563	7,603,306
Supporting services for annual campaign fundraising, management and general	4,580,038	4,970,339
<b>Total expenses</b>	<b>10,611,601</b>	<b>12,573,645</b>
Change in pension benefit obligation	-	-
Change in net assets	24,273,606	100,205

## ASSETS

	2021	2020
Cash and equivalents	2,347,193	6,958,335
Investments	45,089,044	20,776,536
Promises to give, net	8,459,861	6,621,704
Prepaid and other assets	256,856	448,154
Property and equipment, net	152,362	250,574
<b>TOTAL ASSETS</b>	<b>56,305,316</b>	<b>35,055,303</b>

## NET ASSETS



## LIABILITIES

	2021	2020
Accounts payable and accrued expenses	1,317,149	1,449,454
Deferred revenue and other liabilities	358,761	3,987,580
Contributor designations payable	6,860,600	5,857,387
Community impact grants and other grants	1,055,350	1,316,290
Defined benefit pension liability	-	-
Loan Payable	943,531	940,913
Capital lease liability	2,562	9,922
<b>TOTAL LIABILITIES</b>	<b>10,537,953</b>	<b>13,561,546</b>

## NET ASSETS

	2021	2020
Without Donor Restriction		
Operating	13,265,130	6,031,459
Board	<b>29,811,618</b>	12,959,313
With Donor Restriction		
Purpose Restricted	2,515,615	2,327,985
Held in Perpetuity	175,000	175,000
<b>TTL LIABILITIES &amp; NET ASSETS</b>	<b>56,305,316</b>	<b>35,055,303</b>



# AFFINITY GROUPS

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 Ms. Karen Dorbin  
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 Ms. Julia J Irving  
 Mrs. Mary A. Jenkins  
 Mr. Omoyemi J. Johnson  
 Mr. Timothy Li  
 Ms. Paralee L. Massie-Armstrong  
 Mr. Corey McCants  
 Ms. Samantha Mignotte

Ms. Carina Niurka Miranda  
 Ms. Michelle Lynn Montes  
 Wamite Muthara  
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 Mr. William Osborn  
 Ms. Lindsey VanRensalier Parker  
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 Mr. William H. Crocker  
 Mr. Sean Daley  
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 Mr. John M Derrick, Jr.  
 Ms. Krista Carlson Di Laconi  
 Mr. Tyler P. Dorn  
 Mr. Scott W. Dubbeling  
 Ms. Allison Dyer  
 Mr. Isa Farhat  
 Mr. Vincent Ferraro  
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PBMares, LLP  
PNC Bank  
PPL GLOBAL  
PricewaterhouseCoopers LLP  
Prince George's County Government  
Prince George's County Public Schools  
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Principal Financial Group  
Raymond James & Associates, Inc.  
Raytheon Systems Company Falls Church  
Regency Centers  
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RTI International  
Sentara Northern Virginia Medical Center  
Sibley Memorial Hospital  
SRC, Inc.  
Starbucks Foundation  
Suburban Hospital  
Target Brands, Inc.  
TD Bank  
Texas Instruments  
The Fishel Company  
TJX Companies  
Truist Bank  
United Bank  
United Parcel Service  
United Way of the National Capital Area  
United Way Worldwide  
Valero Energy Corporation  
Verizon Foundation  
Vistra Corporate Services Company  
W. R. Grace & Company  
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Wegmans  
Wells Fargo  
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Westat

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