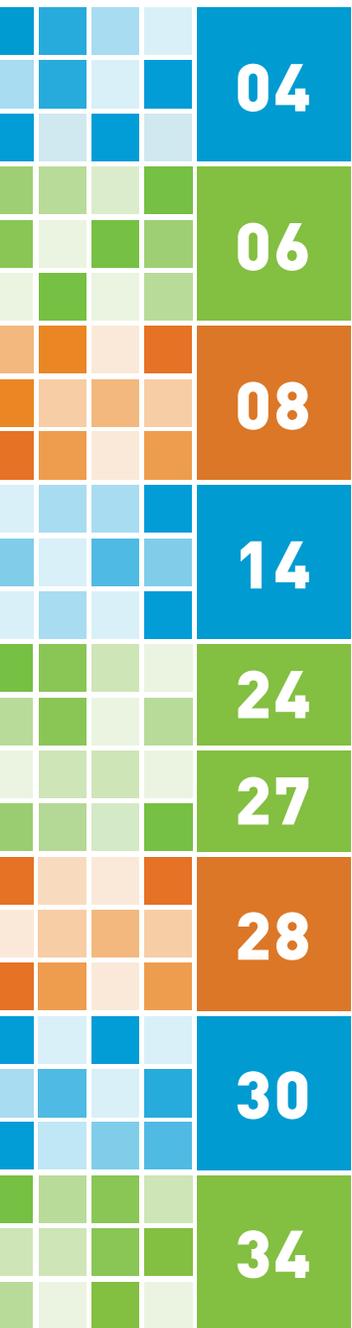


# 2012 ANNUAL REPORT





# TABLE OF CONTENTS



<b>04</b>
<b>06</b>
<b>08</b>
<b>14</b>
<b>24</b>
<b>27</b>
<b>28</b>
<b>30</b>
<b>34</b>

Letter from CEO and Founder

About Us

Organizational Success

Social Impact

Leadership

Developers

Locations

Donors

Financials



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# LETTER FROM CEO AND FOUNDER

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## DEAR SUPPORTERS,

Low-income families often face poorer health and education more often than their middle and higher income counterparts. A lack of resources to weather unexpected challenges can make stable housing difficult to retain and personal success seem out of reach. Research has shown that:

- The unemployment rate in California averaged 10.3 percent in 2012
- The 2012 dropout rates among high school students is at an abysmal 13.5 percent
- Over 25 percent of low-income adults are obese due to a lack of health education
- 40 percent of seniors over 65 years old live alone and are more likely to be isolated

The programs and services provided by Project Access are critical for residents, allowing them to not only find and utilize available resources, but also access the support needed to become self-sufficient. Henry Ford once said, “Coming together is a beginning; keeping together is progress; working together is success,” and at Project Access we are absolutely working together to impact the lives of thousands. We worked to assist 1,753 adults in finding gainful employment, to ensure that 2,119 children were reading at or above their grade level, that 4,963 family members had access to much needed health resources and made sure that 919 seniors didn’t feel lost and alone.

2012 also marked a year of organizational growth, with the opening of 13 new resource centers, the addition of a donor recognition event, the building of our infrastructure with new staff positions, and the announcement of expanding to Denver Colorado in July 2013.

Additionally, a corporate volunteering program was introduced, and 98 volunteers were placed in the first year. We also added a new affordable housing developer to our portfolio to bring our total to 13 developers. We guaranteed our employees felt valued by providing 1,134 hours of training, and promoting 8 internal candidates. We also built up our financial stability by opening an endowment account, and increasing our income by 16%. Most importantly, all of this hard work enabled us to safeguard the critical programs and services we have developed, and in 2012 we were able to serve nearly 10,000 low-income individuals. Thanks to support from individuals like you we have been able to continue this work for 14 years and are looking forward to continued growth. We hope you enjoy reading about our past year’s successes, and will be there for our future achievements.

Sincerely,

**KRISTIN BYRNES**  
CEO & President

**JONATHAN WEBB**  
Founder & Chairman of the Board



# ABOUT US



## ABOUT US

Project Access provides quality focused services to our residents, trusted customer service to our affordable housing developer partners, service providers, and educational institutions and 2012 was one of our best years to date. We are proud of how far we have come since our founding in 1999. From three Resource Centers to 46 and growing!

Project Access works with affordable housing developers/owners in a partial fee-for-service arrangement to bring vital health, education and employment services to residents in their own “backyard” at no cost to them. This partial financial commitment and in-kind donation of space allows Project Access to bring additional resources together to develop comprehensive programs at the Resource Centers within our five key initiatives. All of our growth is a result of the mission of our organization:

### ■ MISSION

Project Access strives to be the leading provider of vital health, education and employment services to families, children and seniors living in low-income housing communities.

### ■ GOAL

Our goal is to help keep family members employed, children in school, and seniors active.

### ■ KEY INITIATIVES

- Health
- Education for Youth
- Capacity-Building for Adults
- Independent Living for Seniors
- Technology



# ORGANIZATIONAL SUCCESS

## ■ ■ RESOURCE CENTERS

2012 was a year of tremendous growth for our organization. We opened 13 new Resource Centers including seven Senior Resource Centers in San Jose, which represented a 77% growth in Northern California, and a 23% growth in Southern California, closing out the year with a total of 46 Resource Centers statewide. Additionally, the announcement was made that Project Access will add two Family Resource Centers in Denver, Colorado with ROC-Bridge Partners.

## ■ ■ PROGRAM HIGHLIGHTS

We provide a wide array of programs to help our residents take the next step to self-sufficiency and long-term success. We believe in going above and beyond to make sure the needs of the residents are met. Programs like our Annual Teen Conference, field trips to Angels Baseball games and art festivals along with community service project led by residents are just a few examples. Two highlights we are most proud of in 2012 is our Financial Asset Building effort, and the National Night Out (pictured right) involved over 80 residents in helping to build a safer, drug-free community through resource fairs, education and community engagement.



## ■ ■ CORPORATE VOLUNTEERS

In 2012, we launched a corporate volunteering program. This gave us the opportunity to further engage our corporate partners, and gave the companies a chance to give back and make a difference. The inaugural year was a success! We partnered with nine corporations, including Union Bank, US Bank, Starbucks (pictured right, serving Thanksgiving) and Edwards LifeSciences, and placed 98 individual volunteers statewide. Athletes First went as far as to “adopt” a Resource Center by identifying needs, connecting resources and providing funding to help a specific center. In addition, they started a weekly reading program with the youth residents.



## ■ ■ ACADEMIC RELATIONSHIPS

2012 brought partnerships with respected higher education institutions that supported our programs and services statewide. A highlight of these partnerships was University of Southern California (USC). A new case management program was launched in partnership with USC. We hosted 10 Master of Social Work interns for the 2012-2013 academic year at 12 Southern California Resource Centers to help residents reach their personal goals through increased access and utilization of resources, supportive coaching and advocacy with the long-term goal of ultimately improving their quality of life.

## ■ ■ VOLUNTEERS AND INTERNS

The volunteers and interns at Project Access are wonderful, hardworking individuals who give their time to help us give our residents a better quality of life. Without them we would not be able to impact entire communities of deserving residents. Last year 110 people volunteered statewide and donated 4,495 hours of their time, valued at over \$108,000. Additionally, we placed 20 interns from 5 academic institutions, including University of Southern California, and Berkley City College, who worked 3,877 hours at 12 Project Access Resource Centers.

## ■ ■ SERVICE PARTNERS

Our relationships with other nonprofits are among some of the most valuable we have. Local nonprofits in the 13 counties in which we serve are an integral part of providing additional programs for our residents to ensure they are getting the critical services needed for success. They provide expertise, prevent duplication of services and increase social impact. In 2012 we worked with over 100 service providers such as mobile health clinics, Food Banks, one-on-one tutoring, parenting education classes, and wellness programs for seniors, to name a few.





## ■ ■ STAFF

The focus on our core values of respect, support, empowerment, integrity, teamwork and collaboration drives our organization. We work hard to provide a supportive and collaborative work environment for our employees. All of our staff are highly qualified and possess a minimum of a bachelor's degree, while many possess advanced degrees, and certifications.

Additionally, we pride ourselves on providing training and development programs, promotional opportunities, accessible leadership and a caring atmosphere. In addition to a strong company culture, we also provide a competitive benefits package, 401K option and a generous vacation/holiday schedule that supports a healthy work life balance. In 2012 we proudly employed 29 full-time staff and 16 part-time staff, and provided 1,134 hours of training. Additionally, we had the opportunity to promote 8 of our internal staff in order to support both our organizational growth and their professional development.

## ■ ■ FINANCIAL STABILITY

We are always working toward long-term financial stability to ensure the low-income residents we serve are able to access the programs they need for years to come. In this spirit we started the Project Access Endowment account with Orange County Community Foundation. It was launched by our Board of Directors with \$5,300 in contributions and will continue to grow through targeted fundraising efforts. Thanks to a strong grant program, successful events and generous donors we were able to raise \$767,173 in 2012.

## ■ ■ EVENTS

We have always prided ourselves on cost conscious events that offer entertainment, value for our supporters, and recognition of residents' successes. In 2012, we launched a new event - Seeds to Success, a donor recognition event at the home of our Founder, Jonathan Webb to engage additional supporters. The events continued with our 2nd Annual Project Access Charity Golf Tournament, which hosted a sellout crowd and raised over \$130,000. The events wrapped up with our flagship event, the 7th Annual Keys to Success Gala at the famed Bowers Cultural Museum, which raised nearly \$230,000 to support our mission. Brian Murphy, President of Athletes First was honored as our Keys to Success Award Recipient for his commitment to improving the lives of others in the surrounding community.

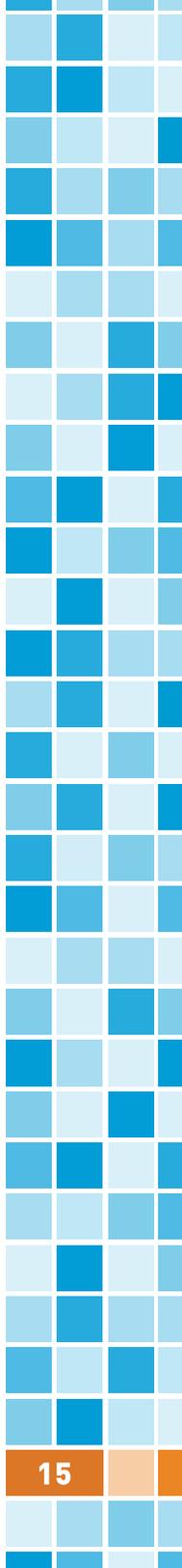




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# SOCIAL IMPACT

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## SOCIAL IMPACT

In 2012, we impacted the lives of nearly 10,000 families, children and seniors in California. We assisted adults in finding gainful employment, ensured that children were reading at or above their grade level, connected families to much needed health resources and made sure that seniors didn't feel lost and alone.

To ensure we are having the greatest social impact we take a holistic approach that supports the entire family with comprehensive services. We go beyond the physical home to provide the services that will help communities prosper and ensure individuals are successful. We provide direct services, referrals to outside agencies and tools to ensure all needs of the families are being met.

## EVALUATION

We consistently measure our core programs: Education for Youth, Health, Technology, Capacity-Building for Adults and Senior Socialization. New initiatives are also evaluated for program effectiveness, such as the Financial Capability and Asset Building programs. It is a three step process that involves constant measuring and improvement. First, we track unduplicated participation in programs through a database to understand our reach. We then measure the impact of services on those that participate using a variety of tools including pre and post-tests, observational tools, self-report surveys, report cards and community-wide surveys. We then use this data to formulate a best practices plan for program improvement. We are proud to share some of our data with you, so you can get a snap shot of our impact.

## HEALTH

We strive to improve residents' immediate health along with their long-term wellness by increasing their knowledge on a variety of health related topics and resources. Through Health Fairs and workshops the residents' awareness of local health resources and access to free screening is increased, while available physical activity classes decreases obesity, and builds community.

**4,963** residents participated in health education programs, including preventative screenings, health fairs, and nutrition programs.

**83%** of residents reported that health programs and referrals to outside organizations increased healthy behaviors in their family.



### PREVENTATIVE SERVICES



**2,767**

residents received preventative services to prevent emergency care. Services received included preventative screenings and connections to local community health clinics where the uninsured can receive primary care.

### NUTRITION AND EXERCISE PROGRAMS



**1,345**

residents combatted obesity by participating in nutrition and exercise programs.

## EDUCATION FOR YOUTH

We take a holistic approach to youth development by not only helping youth excel academically, but also by building their life skills, such as communication and conflict resolution. We are proud to help prepare children for greater success in school and adulthood through school readiness classes, after school tutoring, and teen programs.

**2,922** youth participated in constructive out of school time activities building their academic, social and emotional skills.

### SCHOOL READINESS RESULTS

**127** 3-5 year-old children participated in School Readiness programs, improving their readiness to start school.



### AFTER-SCHOOL PROGRAM RESULTS

**2,119** youth participated in the After School Tutoring program.

**84%** of children showed positive achievement in reading scores.

**73%** of children showed positive achievement in math scores.

**438** youth broadened their understanding of the world by participating in a field trip.



### TEEN PROGRAM RESULTS

**405** teens participated in educational programs to build their leadership skills and reduce risky behaviors.

**90%** of teens reported an increase in leadership opportunities such as volunteering and mentoring.

**83%** of teens reported an increased sense of self-esteem.



# CAPACITY-BUILDING FOR ADULTS

We strive to create a stable home environment by working to strengthen our residents' capacity to provide for their families through educational programs including English as Second Language classes, job search assistance, financial literacy and technology training. By providing these tools our residents are able to attain and retain employment and increase their self-sufficiency.

**1,753** residents received assistance preparing for employment, improved their financial literacy skills, improved their parenting skills and learned English.

## ENGLISH AS A SECOND LANGUAGE RESULTS

**277** residents learned how to speak, read and write English.

## FINANCIAL CAPABILITY RESULTS



of residents indicated that the information they received will help them save more money and/or reduce their debt.



of residents indicated they increased their access and knowledge of available financial services.



1,952

residents participated in Financial Workshops.



1,006

residents learned to better manage their finances.





## ■ PARENT EDUCATION

**274** residents were supported with parent education to do the best job they can to raise their children to become confident, caring, responsible and productive.

## ■ EMPLOYMENT READINESS RESULTS



**98%**

of the residents indicated that the assistance they received was helpful in securing employment.



**82%**

of the adults indicated their computer skills have increased as a result of the Technology program making them more employable.



**441**

residents participated in Job Readiness services such as resume and employment application writing assistance.

# INDEPENDENT LIVING FOR SENIORS

Our senior services offer activities that maintain and improve long-term cognitive health and well-being, encourage social connectedness, and support personal independence. We offer social and recreational activities, workshops on health topics along with age-appropriate exercise classes and technology training.

## HEALTH AND WELL-BEING RESULTS

**90%** of seniors indicated that Project Access health services provided them with knowledge to lead healthier lives.

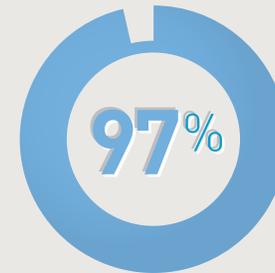
**96%** of seniors reported an improved sense of community.



## SENIOR SOCIALIZATION RESULTS



**919** seniors participated in socialization and transportation programs.



97% of seniors indicated that Project Access programs helped decrease their social isolation and increase their socialization.

# TECHNOLOGY

This initiative provides residents of all ages with onsite access to computers and technology classes. Through this access we are able to bridge the digital divide and assist residents with a variety of opportunities including employment and education.

**3,751** adults and youth accessed technology through Project Access computer labs or by taking part in the computer classes.

**83%** of residents reported that health workshops, screenings, nutrition classes and referrals to outside organizations increased healthy behaviors in their family.



## COMPUTER ACCESS AND TRAINING RESULTS

### ADULTS



184 residents participated in computer classes where they increased their knowledge of information and communication technology.

### YOUTH



**166** youth participated in the Technology Training program where they built their computer skills.

**79%**

of youth residents demonstrated increased use of digital communication.



# COMMUNITY-BUILDING EVENTS AND INFORMATION AND REFERRAL SERVICES

In addition to our 5 key initiatives, Project Access strives to go above and beyond to provide opportunities to our residents, and create a sense of community. Through informational referrals, community-building events, translation services, and special holiday programs residents are provided with the links that will ensure their long term success.

## RESIDENT SATISFACTION

**83%** of residents indicated that Project Access services have helped them to improve a current life situation (such as a financial, health, education or socio-economic issue).

**97%** of residents would recommend the Resource Center's services to neighbors.



**7,329**

residents received a referral to an off-site service, participated in Community-Building events or received translation and interpretation services.



**92%**

of residents indicated that they felt safe in the community they lived in.



**87%**

of residents said that Project Access services helped them form stronger relationships with their neighbors.



5,535

residents encourage community cohesiveness and built social capital with those around them through their participation in Community-Building events.



934

residents received a referral to an off-site service; 2,008 different referrals were made in total.



3

Project Access awarded 3 academic scholarships to help recipients attend college to further their education.



# LEADERSHIP



## 2012 BOARD OF DIRECTORS

### **ADRIAN CRACIUN**

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American Career College

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SENIOR PRIVATE CLIENT ADVISOR  
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DIRECTOR OF FINANCIAL PLANNING  
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PARTNER  
Corporate Securities and Practice Group  
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### **NANCY WAYMACK**

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### **JONATHAN B. WEBB, Chairman of the Board**

PRESIDENT  
Affordable Housing Access, Inc.



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PRESIDENT

Village Investments

### JACQUIN DAVIDSON

CEO & PRESIDENT

Davidson & Associates

### ANA MARIE DEL RIO

CAO & GENERAL COUNSEL

Steadfast Companies

### BILL HIRSCH

CHIEF EXECUTIVE OFFICER

Affordable Housing Access, Inc.

### GREG S. LABATE, ESQ.

ATTORNEY AT LAW

Sheppard, Mullin, Richter & Hampton, LLC

### LARRY LEAMAN

LML Consults

### HERBERT Y. ROSENBLUM

Community Leader

### THOMAS M. DEMCHUK

VICE PRESIDENT

Wells Fargo Bank



## PROJECT ACCESS SENIOR STAFF

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CHIEF EXECUTIVE OFFICER AND PRESIDENT

### CLAUDIA BEATY

CHIEF FINANCIAL OFFICER

### SARA WALL

DIRECTOR OF SOCIAL IMPACT

### RACHEL SANCHEZ

MARKETING DIRECTOR

### TRISTEN CALI

DONOR RELATIONS MANAGER



# DEVELOPERS



## DEVELOPERS

Project Access works with affordable housing developers, owners and property management companies in a partial fee-for-service relationship to bring no-cost services to residents living within low-income communities. This partial financial commitment and in-kind donation of space allows Project Access to bring additional resources together to develop comprehensive programs at our Resource Centers. We are proud to work in partnership with the following Affordable Housing Developers and Property Management companies.

### **AFFORDABLE HOUSING DEVELOPER PARTNERS**

Affordable Housing Access  
AIMCO  
BCC Corporation  
Bridge Housing  
Bridge Investment Group Partners

Eden Housing  
JSM Enterprises, Inc.  
KDF Communities  
Mary Erickson Community Housing  
Oakland Housing Authority

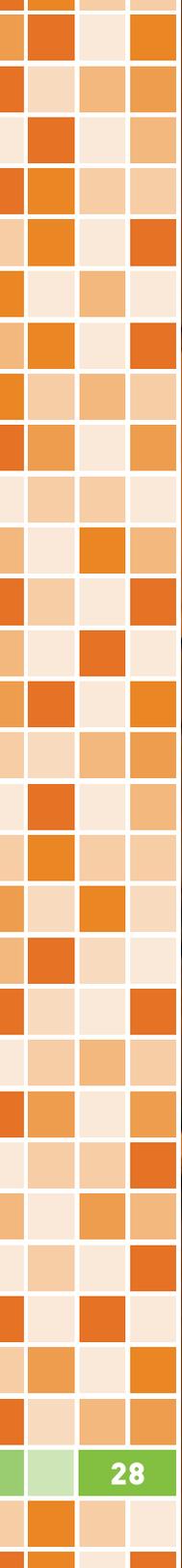
The Related Companies of California  
Bristol Equity Capitol  
Vitus Group

### **ADDITIONAL PROPERTY MANAGEMENT PARTNERS**

BRIDGE Property Management Company  
Bridge Property Management  
CARE  
Citizens Housing Corp.

Eden Housing  
Riverstone Residential Group  
John Stewart  
Oakland Housing Authority

Related Management Companies  
Sandalwood  
U.S. Residential Group, LLC  
Village Investments



# LOCATIONS





# DONORS



# DONORS

## ■ \$100,000 AND ABOVE

Affordable Housing Access, Inc.

## ■ \$50,000 TO \$99,999

Wells Fargo Foundation

## ■ \$10,000 TO \$49,999

Argyros Family Foundation  
Building Block Foundation Fund  
Croul Family Foundation  
Desert Community Foundation  
Edison International  
KDF Communities, LLC  
Mazda Foundation (USA), Inc.  
Roy W. Smith Charitable Foundation, Inc.  
Sisters of St. Joseph Healthcare  
Foundation  
The Crean Foundation  
The Keith and Judy Swayne Family  
Foundation  
The Related Companies of California, LLC  
Thomas J. Long Foundation  
U S Bancorp Foundation  
Wood-Claeyssens Foundation

Anna & Danuel R. Stanger  
Mindy & Glenn Stearns

## ■ \$5,000 TO \$9,999

Bank of the West  
Bascom Group  
BRE Properties  
California Bank and Trust  
Cathay Bank Foundation  
Golden West Partners, L.P.  
Golden West Towers  
HB Consulting, LLC  
John and Gail Ueberroth Family Foundation  
Nancy & Geoffrey Stack Family Foundation  
RHC Properties, LLC  
S. H. Cowell Foundation  
The Allergan Foundation  
Ueberroth Family Foundation  
Union Bank Foundation

Kristin & Aaron Byrnes  
Kirsten & Chad Horning  
Jeanine & Kristoffer J. Kaufmann  
Shahida & Mehmood Khan  
Lauren & Brian Murphy  
Treena & Paul Salerno  
Jill & Mark Skaist  
Sue & Ralph Stern  
Deborah Swett & Jonathan Webb

## ■ \$1,000 TO \$4,999

Best Buy Children's Foundation  
Bridge Housing Corporation  
Bridge Property Management  
Camino Del Sol Apartments  
Carl E. Wynn Foundation  
Century Housing Corporation  
Chelwood, L.P.  
City of Richmond  
East West Bank  
Employees Community Fund of Boeing  
California  
Fowler Property Acquisitions  
Highland Property Development, LLC  
Hitachi Consulting  
Independence Bank  
Lucas General Contracting Corporation  
Mrl Vds, LLC  
NHRA – Orange County Affiliate  
Orrick, Herrington & Sutcliffe LLP  
Parkside Terrace  
R C Baker Foundation  
Richmond Community Foundation

Santa Rosa Gardens  
Steadfast Companies  
Sunstone Hotel Investors, Inc.  
Sydney Stern Memorial Trust  
Target Foundation  
Telogis, Inc.  
Walmart Corporation  
Warwick Square Apartments  
WD Foundation

Sally Durbin & Phil Bedel  
Yvonne & Romir Bosu  
Mike Costa  
Pamela & Ken Cruse  
Jamie Davis  
Ana Marie Del Rio  
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Stephen I. Duffey  
Jonathan Fore  
Kathryn & Robert Grant  
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Carla & Brian Jacobs

John Kassell  
Joe Kernin  
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Julie & Patrick Meany  
Barbara & Stephen Polito  
Stephen Quattrociocchi  
David E. Rose  
Joyce & Herbert Rosenblum  
Kim & Bill Salamandrakis  
Colleen & Terence Scheckter  
Allison & Bryan Stanley  
Ronda & Rich Stayner  
Karen & Mark H. Strauss  
Alexandra & Richard Taketa  
Catherine L. Talbot  
Polly & Joe Ueberroth



■ 500 TO \$999

Alandale Insurance Agency, Inc  
Capital Group Companies  
Girl Scouts of the USA - Troop 1389  
OC Weekly  
Smart & Final Charitable Foundation

Lisa Bereny  
John Bernard  
Roneet & Gary Carmell

Richard A. Chavira  
Jacquin Davidson  
Olivia & Darren Daye  
LeAnn & David Dunn  
Marla & Brian Glabman  
Lindsay & Shawn Green  
Mark Hyatt  
Jennifer & Brendon Kensel  
Jennifer & James Lee

Cameron & Anthony Marrello  
Craig Murphy  
Laura & Dan O'Leary  
Christopher Pope  
Debbie & Joe Rogoff  
John Sandberg  
Leslie & Jason Stern  
Lori & George Szorenyi  
Greg Uematsu

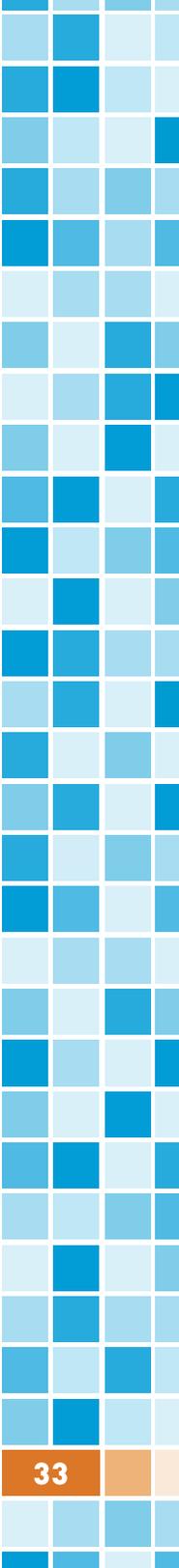
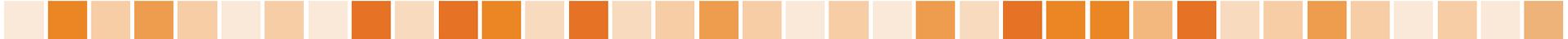
■ 250 TO \$499

DL Realty, Inc.  
JPMorgan Chase & Co.  
Learning and Innovation, Inc.  
TD Wealth

Kurt Anderson  
Heidi Bass  
Chris Burns  
Joe Clark  
Rebecca Clark & Bob Laird

Heather & Mark David  
Ashley & Zachery Fischer  
Lauro Garcia  
Anne Marie & Lee Guray  
Chelsea & Chris Hilbert  
Ruben Islas  
Arthur Jules  
Deborah & David Lake  
James Le  
Carol & Larry Leaman

Mark Lee  
Merrie & Edward Mora  
Richard Payne  
Karyn & Timothy C. Pickart  
Joseph David Ryan  
David Salazar  
Barek Sharif  
Donna & Jim Walter





# FINANCIALS

# FINANCIAL OVERVIEW

In 2012, as a further step towards insuring long-term financial security for the organization, Project Access established its first endowment fund.

## HEALTH AND WELL-BEING RESULTS

(as of December 31, 2012)

Total Assets	\$1,131,879
Liabilities	\$130,822
Net Assets	\$1,001,057
Total Liabilities and Net Assets	\$1,131,879

## AUDITED STATEMENT OF ACTIVITIES

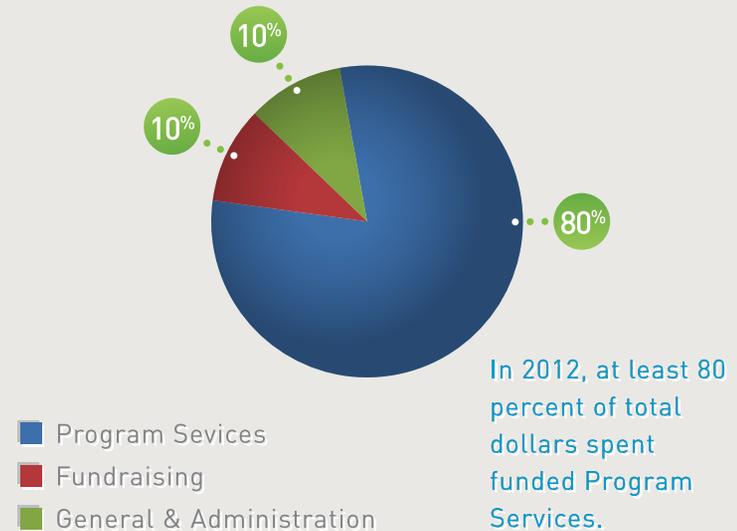
(as of December 31, 2012)

Total Revenue and Support	\$3,980,829
Total Operating Expenses	\$3,667,308
Increase in Net Assets	\$313,521
Net Assets, beginning of year	\$687,536
Net Assets, end of year	\$1,001,057

■ Increased cash reserves by 15% and revenue 63%.

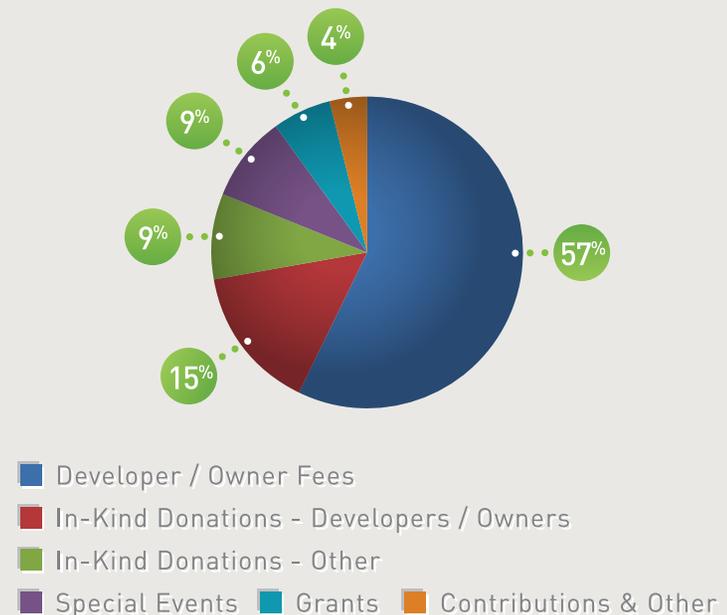
■ Improved balance sheet by 45%.

## 2012 SOURCES OF SUPPORT & REVENUE



\* Fees are not collected from residents

The fees for service were augmented with contributions & in-kind donations that allowed Project Access to provide high quality services.





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Newport Beach, CA 92660  
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[www.project-access.org](http://www.project-access.org)