

CAPACITY
BUILDING
CAMPAIGN



THE TIME IS NOW



Approximately 200,000 young people, ranging from 18–24 years old, enlist in our military each year. These young people, like most Americans, have little knowledge of personal financial management, but an appetite to be of service. When this issue is combined with the challenges unique to military service, seemingly small life problems—like the family car breaking down or refrigerator dying—can start a spiral to financial ruin which damages military careers, disrupts families, and weakens our national security.

Preventing Crisis

Financial crises affect a service member's job performance and mental health, which in turn affects their ability to maintain their critical responsibilities, security clearance and ultimately impacts safety for all in service with them. There are also immediate impacts to service members' families—spouses and children—as they wrestle with housing instability, and a scarcity of essentials, like diapers and food. This type of challenge is not limited to a few service members. As of 2022, it is estimated that 24% of America's military families experience food insecurity.¹

SUPPORT THE ENLISTED PROJECT (STEP) was founded by Veterans who wanted more for our military families than a band-aid approach that would take them from one crisis to the next. Headquartered in San Diego, STEP provides specialized case management, financial literacy education and emergency financial support for junior enlisted service members, Veterans and their families to help them reach financial self-sufficiency. Team STEP currently supports service members in eight counties throughout Southern California and recently responded to demand by expanding services into Washington state, putting STEP in a position to offer life-changing services to 20% of America's military families.

94%

OF STEP CLIENTS
ACHIEVE FINANCIAL
SELF-SUFFICIENCY

65%

OF STEP CLIENTS
IN NEED OF
EMERGENCY
FINANCIAL
ASSISTANCE
WERE RECENTLY
TRANSFERRED TO
SAN DIEGO (LESS
THAN 6 MONTHS)

¹Blue Star Families: <https://bluestarfam.org/food-insecurity-resources/>

Building Capacity Now

The Department of Defense has strategically been moving more troops to the Western United States and will continue to do so in support of the United States' Indo-Pacific Strategy. This means our community is welcoming an increasing number of junior enlisted military members and their families. **STEP is experiencing its highest case load in history and must build capacity now to meet this increase in demand that is at our doorstep today.**



YOUR SUPPORT HELPS STEP PROVIDE ITS FLAGSHIP EMERGENCY FINANCIAL ASSISTANCE PROGRAM (EFA), WHICH GENERATES IMPACT THROUGH FOUR KEY SERVICE DIFFERENTIATORS:



**CERTIFIED
PROFESSIONAL
COUNSELORS**

1

STEP EFA Social Workers are highly-educated professionals and Certified Personal Financial Counselors (CPFC), who come from military service or military families. **STEP Social Workers serve clients in crisis with a level of training, knowledge, and first-hand understanding that is unmatched in the sector.**



**FINANCIAL
LITERACY
BEHAVIORS**

2

The core of STEP'S EFA program is based on behavior modification and building long-term habits that result in financial self-sufficiency, achieved through a solution-focused intervention.



**EMERGENCY
FINANCIAL
GRANTS (EFA)**

3

STEP's EFA program provides immediate emergency funds to military family's creditors to restore or retain basic needs such as housing, utilities, transportation, and food. **To date, STEP EFA grants total more than \$2.2M and have halted 555 evictions, among other necessities.**



**TEAM
COLLABORATION**

4

STEP is proud to collaborate and work with more than 140 community partners who recommend STEP to military families in urgent need of our EFA program and specialized counseling. STEP Social Workers are highly qualified to make referrals back to our network of trusted partners when appropriate.

STEP Capacity Building Campaign: Budget + Impact

Dozens of community members came together to advise STEP on our plans to build capacity and expand services. The following budget and impact projections are the result of months of careful planning that engaged Military leaders, philanthropists, real estate experts, nonprofit executives, government officials and STEP's entire staff and board.

Budget Item	Investment	Immediate Impact	Long-term Impact
Expanding Team STEP by 4 full-time employees: 2 Operations, 2 Social Workers	\$400,000	<ul style="list-style-type: none"> Staff is currently at maximum capacity, serving 900 cases annually. Additional social workers will serve 50 more clients monthly, or 600 more annually. Operations assumes admin tasks currently burdening Programs and Development staff 	<ul style="list-style-type: none"> 2 additional Social Workers will address projected increase in demand Sustainable case load at 1,500 service members/families Increased productivity for Programs and Development
Increase Emergency Financial Assistance Grants Fund	\$200,000	<ul style="list-style-type: none"> Immediate increase in capacity to provide emergency financial assistance for up to 600 more service members/families 	<ul style="list-style-type: none"> Operating budget will increase by this amount following capacity building campaign Sustainable financial support for 1,500 client cases annually
Purchase of 12,000+ Sq. Ft. Headquarters Building	\$5M	<ul style="list-style-type: none"> Double number of families served through warehouse distribution Improved accessibility for clients Purchasing a property outright will eliminate annual rent expense, projected to reach \$300K/annually by 2025 	<ul style="list-style-type: none"> Dramatically improves organization's financial stability —creates equity to draw upon for future expansion. Ability to touch up to 80,000 lives annually through expanded programs and services, including collaborative distribution events
Tenant Improvements	\$400,000	<ul style="list-style-type: none"> Walk-in refrigeration unit for fresh food donations Permitting, insurance Security improvements as needed 	<ul style="list-style-type: none"> Headquarters double as an accommodating gathering space for military families, community volunteers, and collaborative service providers
Legacy of Service Endowment	\$500,000	<p>Purpose is two-fold as STEP is not funded by government or contracts.</p> <ol style="list-style-type: none"> Endowment will represent stability and improve STEP's financial position, which will have a positive influence on funders and increase award decisions Endowment reduces the need for funds raised by providing unrestricted revenue via interest 	<ul style="list-style-type: none"> An addition of \$500,000 to STEP's endowment would produce \$36,000 annually, enough to prevent 13 evictions.

TOTAL CAMPAIGN GOAL

\$6.5M

First Campaign fundraising milestone: 50% of goal raised by Winter of 2023

Envisioning Our New Home



12,000+ sq ft Building
Warehouse, volunteer facilities, counseling center, administrative offices



Expanded counseling center, parking capacity, and required offices space for growing team



Financial Freedom Training Classroom
Available for community use



Central San Diego county location, freeway close, accessible by public transit



Warehouse with refrigeration and Family Goods Distribution Depot



Secure location for clients, staff, Warehouse on Wheels, trucks and heavy distribution equipment



Recognition Opportunities

Gift	Number of Opportunities	
\$2,000,000	1	RESERVED STEP Headquarters Building
\$1,000,000	1	RESERVED Warehouse/Military Family Distribution Center
\$750,000	1	Volunteer Training Suite and Lounge
\$500,000	1	Team STEP Welcome Cente
\$400,000	1	RESERVED Community Commons at STEP
\$250,000	1	Financial Literacy Training Room
\$250,000	1	Team STEP Conference Room
\$100,000	4	Underwrite an FTE for Team STEP
\$100,000	1	STEP Case Management Call Center
\$75,000	1	Team STEP Kitchen and Staff Lounge
\$75,000	4	Counseling Offices/ Family Support Rooms
\$50,000	4	Team STEP Leadership Offices
\$50,000	6	Distribution Center Operations, i.e. Cold Storage Room, Baby Goods Area, Closet, Heavy Equipment



“STEP has been a saving grace for our family. STEP has allowed our family to regain control of our finances. We still struggle sometimes, but we work hard to stick to the plan.”

JACOB

You Can Make An Impact Now



PLEDGE YOUR SUPPORT TODAY

Multi-year pledges and subsequent gifts of cash, appreciated stock, or other assets are a great way to make the biggest impact possible on military families.



STOCK

By making a gift of stock to STEP you are fueling our mission to help military families facing financial crisis.



IRA

A gift from your IRA required distribution offers an alternative to donors who do not need the funds for living expenses and want to support the work of STEP.



LEGACY GIFT

By including STEP in your estate plans, you can join a group of donors who have not only made the ultimate commitment to our mission and community, but are celebrated today and forever.



**For more information or to discuss
your philanthropic plans, contact:**

(858) 695-6810

development@teamstepusa.org

teamstepusa.org/donate

Campaign Leadership

Campaign Steering Committee

John Farnam, Col, USMC (Ret)
Chairman
Chief Operating Officer
Riva Therapeutics

James Carmody
Partner, Vice President
Synergy One Lending

Dave Oates
PR Consultant
Principal
PR Security Service

Jenni Nesbitt
Co-Director
Graham Memorial Preschool

David Schnell, CAPT, USN (Ret)
Vice President North America
Genasys, Inc.

Larry Kesslin
Chief Connector
5 Dots

Ingo Hentschel
San Diego Market Vice President
Cox Communications

Tuck Forsyth
Partner
San Diego Social Venture Partners

Joe Leventhal
Office Managing Partner
Dinsmore & Shohl LLP

Kathy Spetter
Regional Outreach Manager
Navy Federal Credit Union

Campaign Honorary Committee

Laura Galinson
Philanthropist

MajGen Anthony Jackson, USMC (Ret)

Terry Magee, CAPT, USN (Ret)
Magee Enterprises

Board of Directors

OFFICERS

William Boggs, CDR, USMC (Ret)
Board Chairman
Financial Advisor
Pence Wealth Management

David Schnell, CAPT, USN (Ret)
Vice Chairman
Vice President North America
Genasys, Inc.

Devie Gatica
Treasurer
Vice President, Private Banker
U.S. BankSimons Consulting

DIRECTORS

Rick Benito
Senior Vice President
Bank of America

James Carmody
Partner, Vice President
Synergy One Lending

Tom Egan, CMDCM (SEAL), USN (Ret)
Director of Military Programs
and Services
Point Loma Nazarene University

Mike Evans
Senior Vice President,
Columbia Bank

John Farnam, Col, USMC (Ret)
Chief Operating Officer
Riva Therapeutics

Curt Jones, CAPT, USN (Ret)
Senior Program Manager
TYTO Athene

Terry Magee, CAPT, USN (Ret)
Magee Enterprises

Jenni Nesbitt
Co-Director,
Graham Memorial Preschool

ADVISORY COUNCIL

Mike Freeman
Retired
WD-40 Company

Laura Galinson
Philanthropist
LJ Galinson Advised Funds

Ken Garber
Chief Executive Officer
DEL REY Systems & Technology

Greg Jackey, APMA
Senior Portfolio Manager
Jackey/Robinson Group

Margaret "Peg" Millson
Human Resources Consultant

Lonnie Moore CPT, USA (Ret)
Member
VA Federal Advisory Committee

Jeff Simons LDCR, USN (Ret)
President

Laura White Ludvik
President
USS Midway Foundation

“Through the Patriots Connection, and other funds, we proudly invest in STEP’s programs and long-term sustainability. We stand beside this leadership team, knowing that this campaign will result in the direct service of thousands more active-duty military members and Veterans in need.”

CHRIS SICHEL, PRESIDENT AND CEO, RACHO SANTA FE FOUNDATION



HEADQUARTERS
9915 Businesspark Ave., Suite A
San Diego, CA 92131
(858) 695-6810

ORANGE COUNTY OFFICE
1631 Sunflower Ave., Suite C34
Santa Ana, CA 92704
(714) 444-0075

WASHINGTON OFFICE
4001 S. Pine St., Unit 112243
Tacoma, WA 98411
(253) 442-2366