

# Executive Committee

## February 17, 2016

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United Way of Pierce County

# Approval of Minutes January 20, 2016

Jamey McCormick

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# 2015 FINANCIAL HIGHLIGHTS

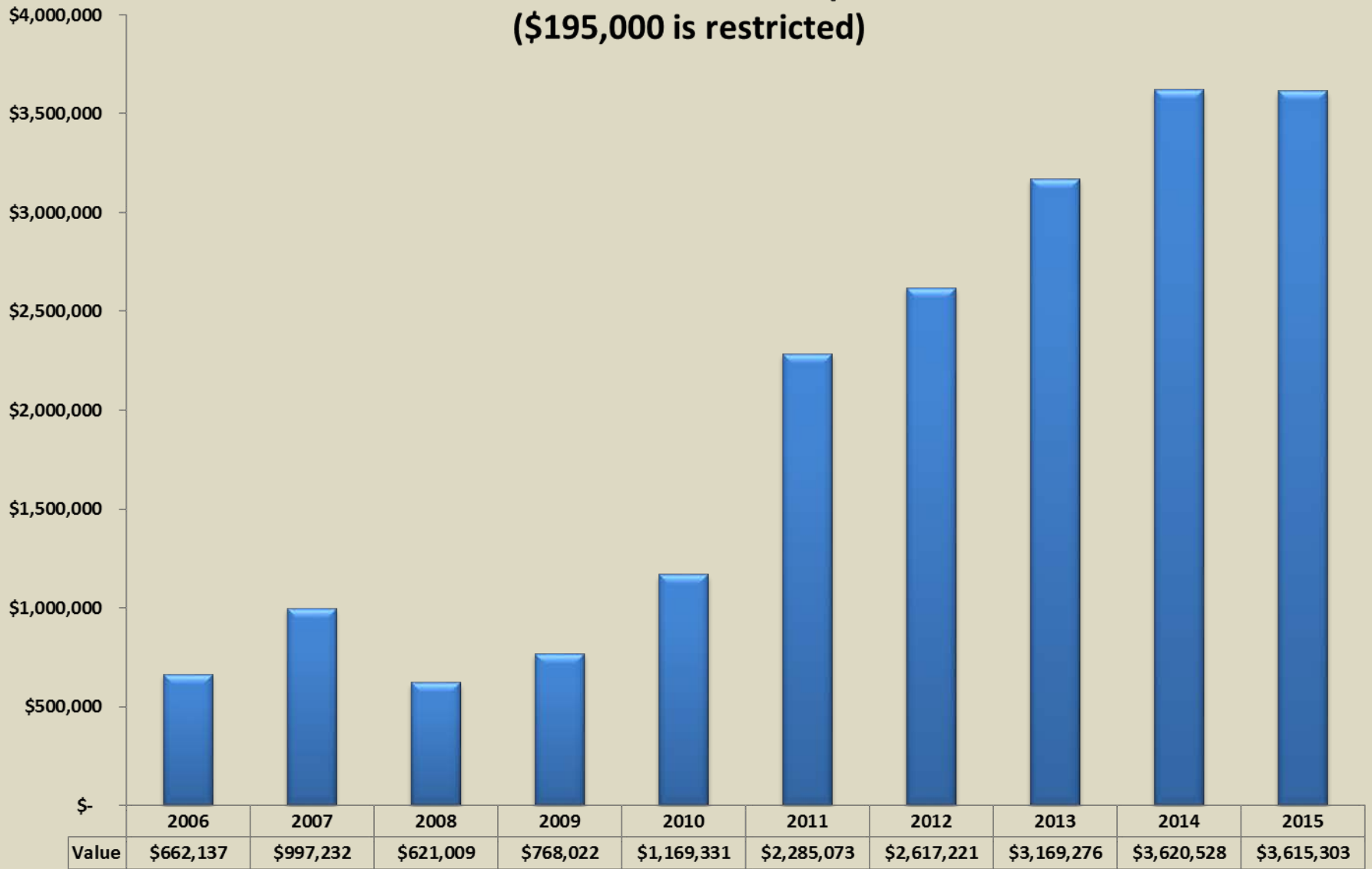
Jennifer Nino

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## Endowment - 2006 Inception (\$195,000 is restricted)

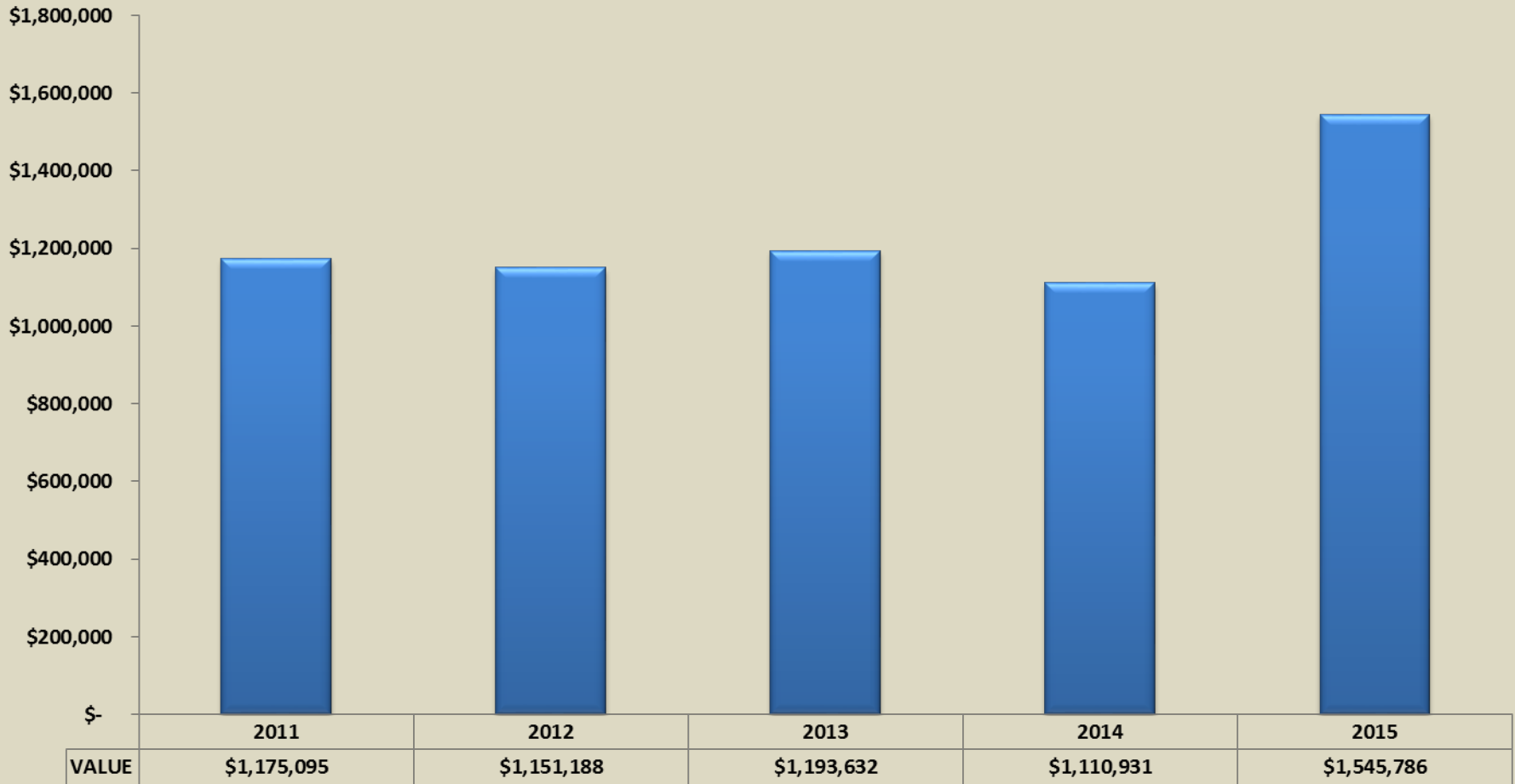


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**Gifts In Kind**  
**Five Year Average - \$1,235,326**  
**Eight Year in a row over \$1M**  
**2015 Record Year**



## Community Impact Grants/Donors



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# FINANCIAL HIGHLIGHTS 2015

## Impact Funding

We invested \$652,383 in the following impact areas:

- Hunger \$270,000
- Early Learning 206,049
- Flexible Impact – Various 90,257
- 2-1-1 New Phone/Website 86,077
- Funded Agencies 1,185,389

## Impact balances as of 12 31 2015

Flexible Impact	\$44,704	
Housing	50,000	(designated Gates Grant)
Seimer	25,000	
Bank of America – Hunger	25,000	
Early Learning	38,284	
Milgard 2-1-1 Military Spec	192,000	(Jan 2016 to June 2017)
Boeing Indicators	72,401	
Center for Strong Families	110,000	

## Unrestricted Reserves with Minimum Target



	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Unrestricted \$	\$500,000	\$1,504,000	\$1,304,000	\$1,247,000	\$886,348	\$1,229,422	\$1,662,498	\$1,321,543	\$1,234,403	\$1,280,000
Target	\$707,000	\$825,000	\$770,000	\$716,000	\$725,000	\$737,000	\$749,000	\$780,000	\$805,000	\$725,000

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# FINANCIAL HIGHLIGHTS 2015

## Betye Martin Baker Human Service Center

Our building cash position decreased from \$171,672 to \$147,911. We made the second to last payment of \$102,500 to the Boys and Girls Clubs for their Hope Centers. The balance of their grant, \$102,081 will be paid off in 2016

# ON THE RADAR FOR 2016

Building cash reserves – getting low – will have to borrow from UWPC reserves for unexpected repairs

2015-16 Campaign may fall short \$300,000 of budget, drawing down reserves to \$750,000 (Staff, Campaign Cabinet, Board all working on gap strategies to minimize)

May want to revise budget to reflect known shortfall in CFC Campaign from \$820,000 to \$565,460 (\$254,540)

# President's Report

Dona Ponepinto

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- Past Campaign Chairs /Board Member luncheon
- CSF – status /grant opportunities
- Labor Convening in Olympia / Lobby Day – Patty and Jamey - highlights
- ADT – event at Corry and Donna McFarland’s home
- Neighborhood Grants

# Campaign Cabinet Updates

Linda Kaye Briggs

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# Campaign Cabinet

## Top 10 Strategies for Closing the Gap

- 1 Develop new message with “sense of urgency” that collaborates with existing marketing messages to be used by Staff/Board of Directors/Campaign Cabinet/Volunteers
- 2 Meet with ADT donors who have not currently given this year to ask/strategize for larger gift and match with initiative (bigger donor impact) for more than \$10K. Incorporate with new message. [29 donors]
- 3 Prioritize remaining CEO calls for campaigns not started, but remain to begin between December 1 and June 30. Incorporate Volunteers/Campaign Cabinet/Board Members on call with Dona presenting new message/sense or urgency

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- 4 Deep review of future campaigns, determine if room for more aggressive projections
- 5 Increase major gift donor engagement/calls/approaches with CEO – Dona
- 6 Bring together previous Campaign Chairs (January 2016) and PAST Board Members to educate on new message and seek counsel for moving forward in filling gap/future gaps. Plan to include stewardship for ongoing relationship
- 7 Complete personal Spider Map and return
- 8 Bring together Company Campaign Coordinators for campaigns that have not run to introduce “sense of urgency” and best practices/testimonials [Spring Campaigns]

- 9 Identify which top 50 strongest campaigns are locally owned/operated for UWPC's CEO and Volunteer to present new "urgency" ...merge with CEO call effort
- 10 Create question on pledge form, "Do you belong to a union, if yes, which one?"
- 11 Research levels of recognition to discover if tiered leadership levels exist. Pete to research and connect with Mike Robinson and David Graybill. Investigate and recommend new/recognition levels for \$1,000 and up. [Currently on UWPC Website: Pierce, Evergreen, and Rainier levels] Assess possibility of recognition event with sponsors to leverage/celebrate leadership levels.

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# Community Impact

Lindsay Morgan Tracy

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# Adjournment

Jamey McCormick

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