

Executive Committee

March 18, 2015

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United Way of Pierce County

Financial Update

Jennifer Nino

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- Proposed UW Life Policy
- Property Update

Organizational Assessment Updates

Matt Levi & Pete Grignon

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- Overview of results
- Prep for Board discussion and next steps

Family Opportunity Center Update

Dona Ponepinto

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The Opportunity

To change the story for families by creating neighborhood Family Opportunity Centers that provide financial stability programs, parenting supports and other resources customized by location, based on the needs of the communities they serve.



A SparkPoint Center

\$500M Match

- United Way - \$100K + \$42,500 (placeholder)
- Russell Foundation - \$100K
- City of Tacoma - \$85K
- Impact Capital - \$85K
- Columbia Bank - \$25K
- MultiCare - \$25K
- Franciscan - \$25K
- Weyerhaeuser - \$10,000
- Commencement Bank - \$2,500
- Additional match opportunities: US Bank, Key Bank, TrueBlue, Regence, WorkForce Central and others

President's Report

Dona Ponepinto

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United Way of Pierce County

- 2015 yearly goals
- Reflection events
- South Sound Together
- Business Plan Update
- Dues Structure updates
- CEO Goals for the year
 - Yearly Goal

2015 Organizational Goals

COMMUNITY IMPACT:

Impact Scorecard with defined metric and benchmarks in place as well as the execution of two to three impact products aligned against the 5 year strategic objectives and 10 year goals.

LONG TERM, SUSTAINABLE GROWTH:

Implement growth strategies targeted towards planned giving/principal gifts and donor retention. Align growth strategies with impact products that result in increased revenue from multiple sources.

ORGANIZATIONAL ALIGNMENT AND PERFORMANCE:

Organization is effectively aligned and has the capacity and capability to execute and achieve our 5 year strategic goals

DONOR ENGAGEMENT AND RELATIONSHIPS

Create opportunities to engage leadership level donors and top supporting companies (reduce donor churn) in deeper meaningful connections that invite, connect and commit to action.

Campaign Update

March 13, 2015

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Campaign Goals By Revenue Stream

As of March 13, 2015

	2013 Actual	2014 Goal	2014 Actual	Outstanding Projection	Gap (Act+Proj)-Goal
Workplace	\$ 4,623,242	\$ 5,114,000	\$ 3,857,858	\$ 919,271	\$ (336,871)
United Way Life**	\$ -	\$ 250,000	\$ -	\$ 250,000	\$ -
Direct Giving Online	\$ 345,999	\$ 464,000	\$ 184,609	\$ 279,391	\$ -
Sub Total:	\$ 4,969,241	\$ 5,828,000	\$ 4,042,467	\$ 1,448,662	\$ (336,871)
Grants	\$ 391,169	\$ 640,000	\$ 535,000	\$ 105,000	\$ -
UWPC Total:	\$ 5,360,410	\$ 6,468,000	\$ 4,577,467	\$ 1,553,662	\$ (336,871)

2013 Numbers--Used Actuals: Workplace is Total in Enterprise less CRD and Direct

2014 Total--\$925,000 ADT Goal is split \$611,000 to Workplace and \$314,000 to Direct

Closing the Gap: Campaigns closed but unaudited **\$66,460** and another **\$325,350** projected for campaigns currently running through February. **Total - \$391,810**

Campaign Goals By Donor Segment

As of March 13, 2015

	2013 Actual	2014 Goal	2014 Actual	Outstanding Projection
ADT	\$ 704,046	\$ 925,000	\$ 671,235	\$ (231,235)
Leadership Donors (<\$10,000)	\$ 917,451	\$ 1,188,000	\$ 740,693	\$ 447,307
Non-Leaders	\$ 1,612,973	\$ 1,650,000	\$ 1,226,476	\$ 423,524
Total	\$ 3,234,470	\$ 3,763,000	\$ 2,638,403	\$ 639,597
Direct Giving (without ADT)	\$ 105,544	\$ 150,000	\$ 104,584	\$ 45,416

Closing the Gap: Campaigns closed but unaudited **\$66,460** and another **\$325,350** projected for campaigns currently running through February. **Total - \$391,810**

Closing the Gap

Element and Milestones	Metrics	Lead (s)
Deliverable 1: Closing the Gap		
<ul style="list-style-type: none"> Donor Telethons – to help reduce churn 		Dan/Mary
<ul style="list-style-type: none"> Pre-Spring Telethon Campaign set for February 17 Contacting Major Campaigns and Donors campaigns not run. Supports overall leadership donor goal to reduce 31% leadership churn rate to 20%. Pulled donors of \$500more 31% churn – would be \$74,217 Invite to 2-11 Tour Feb 23rd and 24th 	281 Donors Represent \$239,409 Goal: reduce churn this group [\$74,217] Calls made: 219 (23 spoken to) Represent: \$203,066	Jody/Sean
<ul style="list-style-type: none"> Thank You Calls/Telethon (3 – March/April/May) Thank Donors \$5,000 and up All Staff invited – Expectation 2 hours each month (30 minute block options). Board – Packets to thank donors (distribute March Board mtg) 	5,000+ thank yous made	Jody/Sean
<ul style="list-style-type: none"> Lapsed Donor Mailing & Telethon – mail lapsed donor remit prior to calls (reference in calls) – visual piece like Uway Treasure Valley (2 to 3 wks prior) Phone component on May 4th 	****Calls Goal: Recapture 10 to 15% As of 2/26: 3,200 donors and \$828,628 (10% recovery is \$82K and 12.5% would be \$103K)	Jody/Sean
<ul style="list-style-type: none"> Three leadership Donor Events with MultiCare 		Mike
<ul style="list-style-type: none"> Major Gifts: To meet goal of \$925K <ul style="list-style-type: none"> Nola letter finalize gift Bamford Foundation (\$18K yr/3yrs) Confirm gifts of ADT outstanding New Gift list (see document) 	This is just to meet goal. Would need to break to close gap.	Sean/Dona
<ul style="list-style-type: none"> Spring Direct Giving Planning (likely launch Apr/May) 	\$70,000 (would break annual goal by \$10,000)	Nicole
<ul style="list-style-type: none"> New Business 	\$17,000 - \$20,000	Mike
TOTAL GAP CLOSURE POTENTIAL: Top of range is if hit high marks and all of them. Lower range is based on the lower figures.	\$170,000 to \$207,000	

Adjournment

Jamey McCormick

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