

Executive Committee

April 22, 2015

LIVE UNITED



United Way of Pierce County

Financial Update






Jennifer Nino

LIVE UNITED



United Way of Pierce County

FINANCIAL HIGHLIGHTS

-  2014-15 campaign pledges on books \$5,139,368. 83% of our budget goal compared to 86% prior year; 79% two years ago.
Multicare and News Tribune still running their campaigns
-  Collections on pledges in the door are 39.81% within the normal range of 0-3% of the prior two years: 38.37% and 36.80%
-  Departmental expenditure line items over by \$5,000 – None
-  Endowment balance at \$3,701,689, highest ever; \$3,220,333 prior year
-  We have signed an MOU with the Children’s Museum of Tacoma to operate a quality child care center in our building. The facility will mainly support UWT faculty and low income staff. Target date for opening January 2016

Governance Committee Update

Jamey McCormick

LIVE UNITED



United Way of Pierce County

- Organizational Assessment
- 2015-16 Board of Directors Slate

Business Plan Update

Dona Ponepinto

LIVE UNITED



United Way of Pierce County

Closing the Gap

April 3, 2015

LIVE UNITED



United Way of Pierce County

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	

President's Report

Dona Ponepinto

LIVE UNITED



United Way of Pierce County

- Advocacy Update
- Staffing Update
- ALICE
- Dues Structure Updates

Executive Session

LIVE UNITED



United Way of Pierce County

Adjournment

Jamey McCormick

LIVE UNITED



United Way of Pierce County