

Executive Committee

May 20, 2015

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United Way of Pierce County

Audit Report

McGladrey
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Campaign Update: Closing the Gap – Board Engagement Strategies/ Opportunities

Jamey McCormick

Dona Ponepinto

Sean Armentrout

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Campaign Goals By Revenue Stream

As of May 18, 2015

	2013 Actual	2014 Goal	2014 Actual	Outstanding Projection	Gap (Act+Proj)-Goal
Workplace	\$ 4,623,242	\$ 5,114,000	\$ 4,516,504	\$ 190,023	\$ (407,473)
United Way Life**	\$ -	\$ 250,000	\$ -	\$ 250,000	\$ -
Direct Giving Online	\$ 345,999	\$ 464,000	\$ 218,265	\$ 245,735	\$ -
Sub Total:	\$ 4,969,241	\$ 5,828,000	\$ 4,734,770	\$ 685,757	\$ (407,473)
Grants	\$ 391,169	\$ 640,000	\$ 535,000	\$ 105,000	\$ -
UWPC Total:	\$ 5,360,410	\$ 6,468,000	\$ 5,269,770	\$ 790,757	\$ (407,473)

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 **\$80,017** and another **\$17,600** projected for campaigns currently running through May 8. **Total - \$97,617**

Campaign Goals By Donor Segment

As of May 18, 2015

	2013 Actual	2014 Goal	2014 Actual	Outstanding Projection	Gap (Act+Proj)-Goal
ADT	\$ 704,046	\$ 925,000	\$ 722,258	\$ (282,258)	\$ (202,742)
Leadership Donors (<\$10,000)	\$ 917,451	\$ 1,188,000	\$ 916,464	\$ 271,536	\$ (271,536)
Non-Leaders	\$ 1,612,973	\$ 1,650,000	\$ 1,483,272	\$ 166,728	\$ (166,728)
Total	\$ 3,234,470	\$ 3,763,000	\$ 3,121,993	\$ 156,007	\$ (641,007)
Direct Giving (without ADT)	\$ 105,544	\$ 150,000	\$ 109,740	\$ 40,260	\$ (40,260)

Closing the Gap: Campaigns closed but unaudited **\$80,017** and another **\$17,600** projected for campaigns currently running through May 8. **Total - \$97,617**

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	

Summer Learning Initiative

Sean Armentrout
Aimee Collins

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Campaign Components

Focus: Summer Learning Initiative

- The Summer Learning Initiative is focused on stopping the ‘summer slide’ by providing access to opportunities for supplemental learning and reading activities over the summer. Components of the initiative include:
 - Summer Learning Every Child website – featuring opportunities across Pierce County in one easy to use website for parents
 - Summer Learning Project with summer meal sites – providing weekly enrichment and reading activities for children being served by free summer meal sites
 - Little Free Libraries project, where volunteers will build, decorate, install and fill Little Free Libraries in neighborhoods around two high-need schools—giving kids access to books throughout the summer

Why is it important?

FACT: Kids without access to summer enrichment programs lose more than two months in reading achievement. By the end of fifth grade, this may add up to nearly three grade equivalents. Your donation makes enrichment programs more accessible to kids throughout Pierce County and makes a “summer slide” fun again.

Fundraising & Marketing Mechanisms

- **Public Relations:** Exit133, Business Examiner and Tribune
- **Direct Mail:** 1 letter, 2,200 letters total
- **Direct Email:** 81,840 emails, 20% Average open
- **Videos:** Tutors, parent/child, Prairie Ridge piece & educator testimonials
- **Blog Articles:** Two blogs from different perspectives.
- **Social Media:** Twitter and Facebook included daily posts & crowdfunding

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President's Report

Dona Ponepinto

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- Organizational Assessment/Goals
- Advocacy Updates
- Dues Structure Update
- Prairie Line Trail
- Celebrate Community Event

Board Meeting Schedule

Jamey McCormick

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Adjournment

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