

BOARD MEETING

August 28, 2015

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United Way of Pierce County

ACTION:

Approval of Minutes

June 26, 2015

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Financial

Jennifer Nino

Pete Grignon

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FINANCIAL HIGHLIGHTS



Bad News, Good News:

2014-15 campaign pledges fell \$270K short of our budget forecast but, we will make it up through departmental expenditure savings, over collecting of the 2013 campaign and designations may come in less than anticipated.



Collections on pledges in the door are 60.44% ahead of the normal range of 0-3% of the prior two years: 58.30% and 56.96%



Departmental expenditures under by \$195,000

Line items over by \$5,000 – None



Endowment balance at \$3,745,784; \$3,290,080 prior year



MultiCare has made a lease offer to stay in our building for two years with option for an additional two years

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AUGUST 2015

STANDARD M (ACTION ITEM FOR BOARD MEETING)

- United Way system standard for deducting resource development and organizational administration expenses from donor designated gifts
- The fee is based on a three year average of our campaign revenue only and related costs – maximum allowable fee for the coming campaign is **22.50%**
- The calculation excludes “other” revenue: Gifts In Kind, bequests, rental and investment income
- That fee, or a lesser amount can be used

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AUGUST 2015

STANDARD M (ACTION ITEM)

Past Policy:

The cost to charge designated gifts to other non profits will be the lower of a five year average of our overhead cost or United Way system Standard M, whichever is lower. Standard M calculates the maximum cost you can charge, but allows for a lower charge.

The charge for designated gifts for this coming campaign year based on the five year average would be **17.84%**.

Note: Last year we charged below the five year average – 17.50%

AUGUST 2015

STANDARD M (ACTION ITEM)

Last five years of costs applied to designated gifts:

2010 - 17.19%

2011 - 15.67%

2012 - 14.80%

2013 - 16.76%

2014 - 17.50% (five year average was 17.69%)

AUGUST 2015

STANDARD M (ACTION ITEM)

MOTION: To approve a cost deduction percent of 17.50% for designations paid to other nonprofit agencies for the upcoming 2015-16 campaign

EARTHQUAKE INSURANCE

Current premium is \$20,000 per year; \$550,000 deductible and does not cover the brick façade

After review with our insurance broker the Finance Committee is recommending we consider discontinuing earthquake coverage January 2016 and set aside a contingency reserve

Another option that the insurance broker offered was to have a structural engineer review the level of earthquake retrofitting that occurred in 1995

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President's Report

Dona Ponepinto

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- Planned Parenthood
- Business Plan Update
- Staff Update
- Staff and Volunteer Roundtable

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Centers for Strong Families Update and Next Steps

Jamey McCormick
Dona Ponepinto

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- Overview of Strategy/Alignment to Strategic Objectives
 - What it looks like
 - Why it is important
 - How it works
- Our Role
- Costs/Funding Plan

Centers for Strong Families

Addresses Both Sides of the Income Statement

Center for Working Families: Bundling of Services

Workforce Development

- Career Coaching
- Skills Training

Income Supports

- Benefits Screening and Enrollment
- VITA and EITC Refunds

Financial Services

- Financial Coaching and Planning
- Access to products that meet both liquidity & asset building needs

Increase Income

Control Expenses/Manage Debt

Household: Greater Control over Financial Life

Community: Greater Access to Financial Mgt & Asset Bldg Opportunities

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Why Centers for Strong Families?

- Providing the safe, nurturing environment that children deserve is easier when a family is financially stable
- Low-income families face numerous challenges in trying to achieve stability
 - A job alone isn't enough!
 - “Few have been able to spend their way out of poverty” - Sherraden
 - Key to moving people out of poverty and keeping families stable...ASSETS (building wealth & marketable skills)

How Do Centers for Strong Families Work?

CSFs help low-income families reach financial stability and build a solid foundation for their children

Traditional Approach

- View clients through spectrum of services offered
- Transactional (# of services delivered)
- Focus on job placement
- Minimize discomfort associated with living in poverty

New Approach

- Meet clients where they are and help them assess their goals and dreams
- Long-term (2+ year) one-on-one relationship with financial stability as end goal
- Focus on net income and wealth
- Empowerment model: assist individuals in moving out of poverty

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CSF Model Comparison

COMMUNITY-BASED

Co-location Model	Multiple organizations come together to deliver integrated CSF services in a single location
Single Organization Model	An existing, trusted organization develops integrated CSF services within its own walls

CAMPUS-BASED

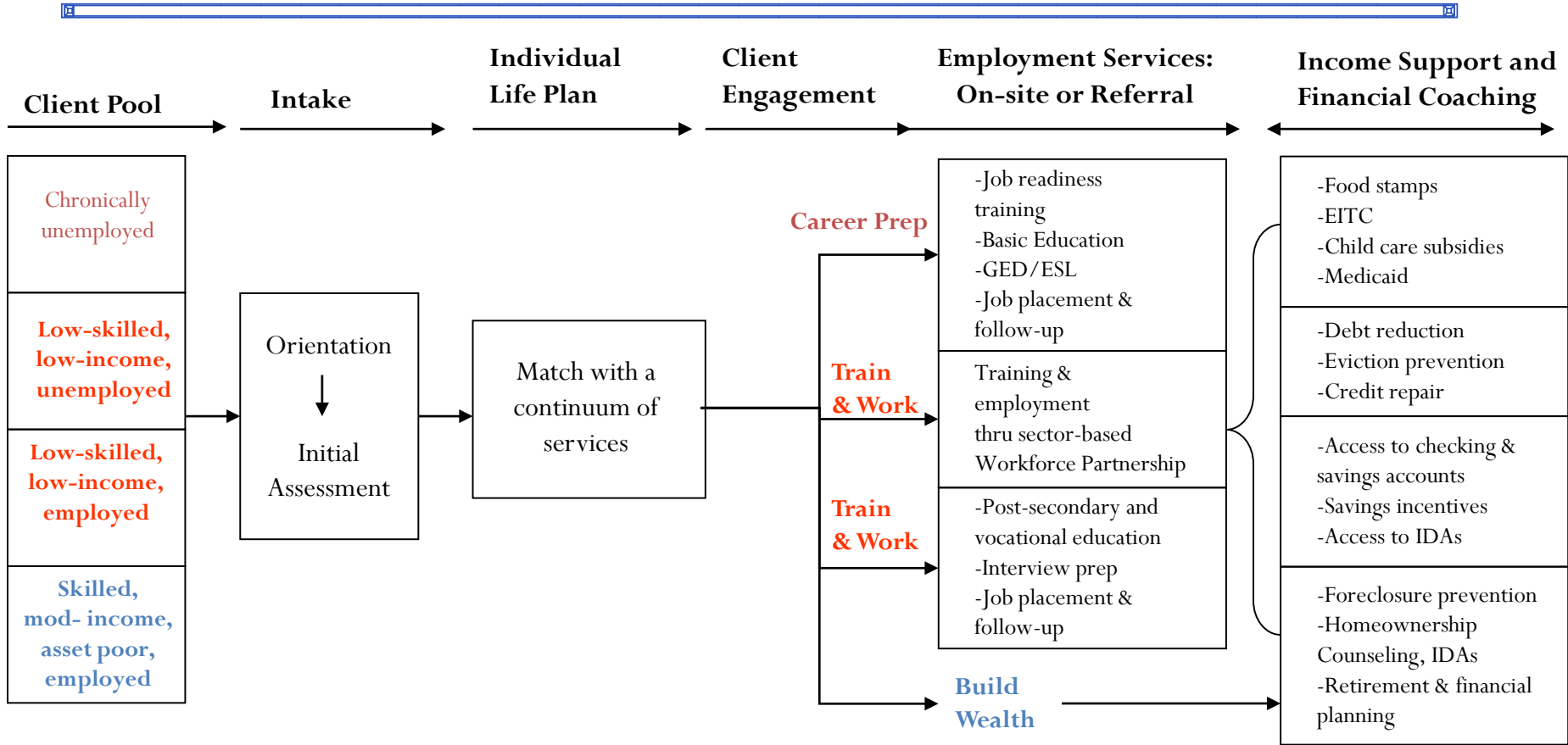
Community or Technical College Model	Integrated CSF services delivered onsite at local community or technical college
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What will it look like?

Trusted Community based organization

- 75% of services
- Data collection
- Commitment from CEO of Organization
- Example

Centers for Strong Families



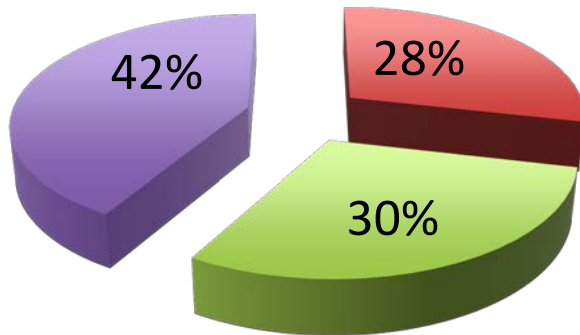
Bundled Services: clients are able to access income supports, financial coaching and workforce development at same time and as needed

Smith Family in Baltimore, MD	Before	Workforce Development	Access to Benefits	Accessing Affordable Financial Services
Income				
Wage	\$ 19,008	\$ 25,344	\$ 25,344	\$ 25,344
Child Support	\$ 2,436	\$ 2,436	\$ 2,436	\$ 2,436
Interest Income from Savings (avg. \$1500 at 1.5%)	-	-	-	23
Total Income	\$21,444	\$ 27,780	\$ 27,780	\$ 27,803
Expenses				
Housing/Utilities	\$ 8,808	\$ 8,808	\$ 7,603	\$ 7,603
Child Care	\$ 8,988	\$ 8,988	\$ 5,842	\$ 5,842
Food	\$ 4,752	\$ 4,752	\$ 4,752	\$ 4,752
Transportation	\$ 3,444	\$ 3,444	\$ 3,444	\$ 3,444
Health Care	\$ 3,108	\$ 3,108	\$ 1,942	\$ 1,942
Miscellaneous	\$ 2,880	\$ 2,880	\$ 2,880	\$ 2,880
Total Household Expenses	\$31,980	\$ 31,980	\$ 26,463	\$ 26,463
Check-cashing	\$ 380	\$ 507	\$ 507	60
Furniture Finance Charges (valued at \$2000)	\$ 1,809	\$ 1,809	\$ 1,809	\$ 70
Emergency Loans (or pay-day)	\$ 596	\$ 596	\$ 596	\$ 85
Total Finance Charges	\$ 2,785	\$ 2,912	\$ 2,912	\$ 215
Earned Income Tax Credit (federal)			\$ (518)	\$ (518)
Child Care Tax Credit			\$ (960)	\$ (960)
Child Tax Credit			\$ (2,000)	\$ (2,000)
Total Expenses	\$ 34,765	\$ 34,892	\$ 25,897	\$ 23,200
Net Income	\$ (13,321)	\$ (7,112)	\$ 1,883	\$ 4,602

Baseline CWF

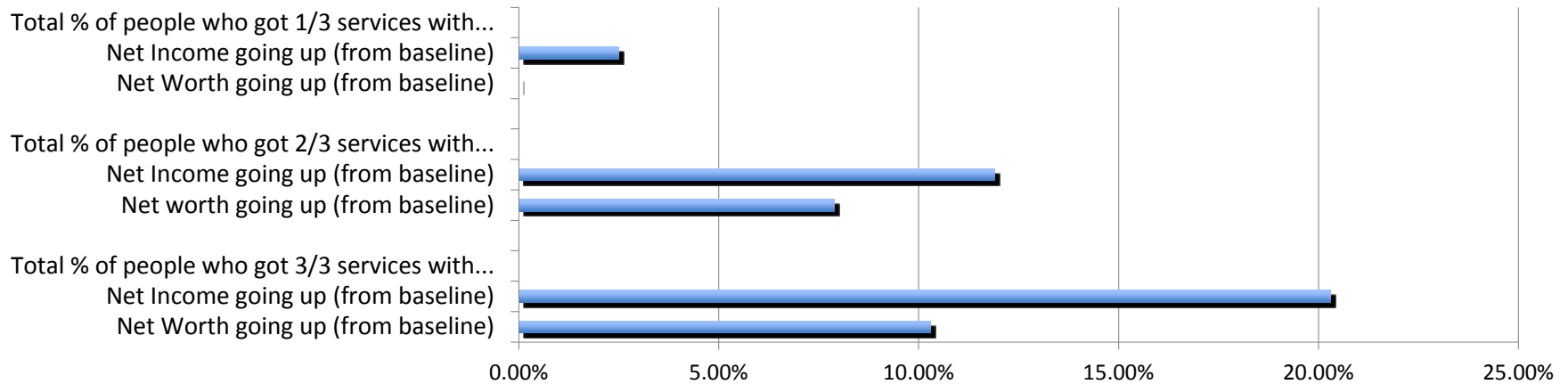
2008-10

Pilot Aggregate Service Bundling Outcomes



- Total % of people who got 1/3 FFT services
- Total % of people who got 2/3 FFT services
- Total % of people who got 3/3 FFT services

Pilot Aggregate Outcomes



- Estimated costs for start up and funding of one CSF - \$172,000

Current Resources Committed

- City of Tacoma - \$85,000
- CHI - Franciscan Health - \$25,000
- MultiCare - \$25,000
- Total - \$135,000

Pending consideration

- Columbia Bank - \$25,000
- Commencement Bank - \$2,500
- UWPC - \$100,000
- Total pending approval: \$127,500

Center For Strong Families

Reserve before CSF Request	1,378,403
CSF Request from Board	(100,000)
Projected 12 31 2015 Unrestricted Reserves	1,278,403
Minimum Target Reserves (3 months of operations)	724,000
Reserves over minimum target level	<hr/> 554,403

Recommendation

- Staff recommends to the board approval of \$100,000 for the implementation of the CSF model in Pierce County. Funds would be taken out of reserves.

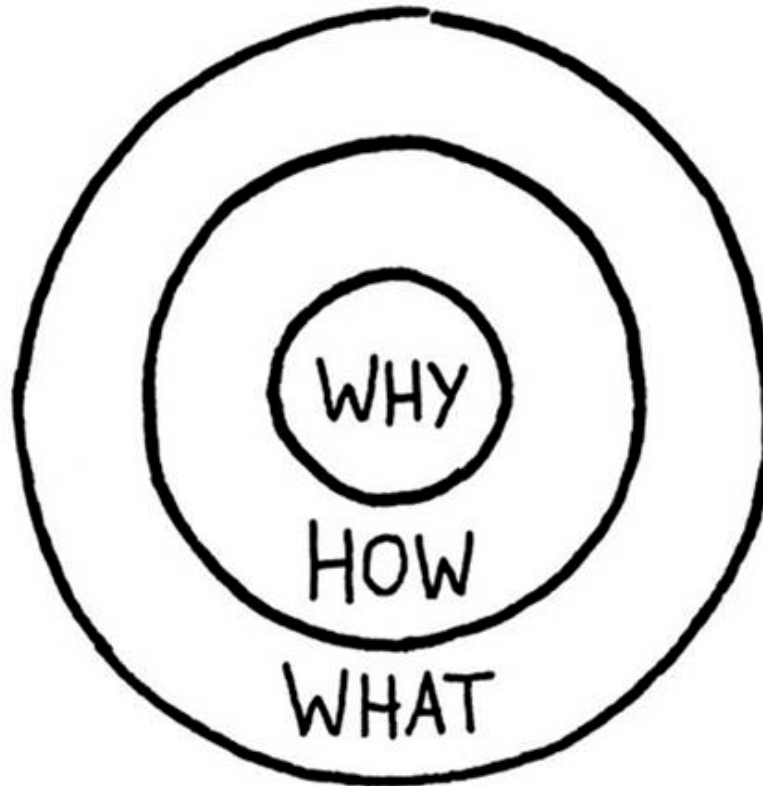
Organizational Assessment: Strategic Communications

Jamey McCormick

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Why = The Purpose

What is your cause? What do you believe?

Apple: We believe in challenging the status quo and doing this differently

How = The Process

Specific actions taken to realize the Why.

Apple: Our products are beautifully designed and easy to use

What = The Result

What do you do? The result of Why. Proof.

Apple: We make computers

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Communicating Impact

- Getting to the Why?

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2015 Campaign Strategies

Sean Armentrout

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2015-16 Campaign Goals

	2013 Actual	2014 Actual	2015 Goal
Workplace	\$ 4,623,242	\$ 4,660,034	\$ 4,843,000
United Way Life	\$ -	\$ -	\$ 500,000
Direct Giving (non-ADT)	\$ 105,544	\$ 116,268	\$ 165,000
ADT*	\$ 704,046	\$ 801,883	\$ 925,000
Sub Total: **	\$ 4,906,832	\$ 4,964,452	\$ 5,783,000
CSF Revenue Commitments	\$ -	\$ -	\$ 1,200,000
Grants (traditional)***	\$ 391,169	\$ 535,000	\$ 200,000
UWPC Total:	\$ 5,298,001	\$ 5,499,452	\$ 7,183,000

*ADT total includes Russell Family Foundation. 2015 Represents 15% growth

**Backed out ADT WP from subtotal to not duplicate WP and WP ADT. This is \$650,000 in 2015 Goal

*** Grants in 2014 included First 5 Fundamentals (\$300K) which is now independent

Campaign Goals By Donor Segment

	2013 Actual	2014 Actual	2015 Goal
ADT	\$ 704,046	\$ 801,883	\$ 950,000
Leadership Donors (<\$10,000)	\$ 917,451	\$ 924,089	\$ 1,000,000
Non-Leaders	\$ 1,612,973	\$ 1,521,990	\$ 1,613,000
Total	\$ 3,234,470	\$ 3,247,961	\$ 3,563,000

Key Goals:

* ADT: Move from 29 to 40 members

** Leadership Donors: Grow from 546 to 660 Donors. (Includes Reducing churn by 10%)

2015-16 Community Campaign Goal Tactics: Individual Donor Engagement (IDE)

Last Year

- 523 Leadership donors to 546 in 2014. But only grew \$6,638 in leadership donor revenue
- Thanked All Donors over \$200
- Built out ROI piece and Bubble Story Piece Donors
- Focus – Corporate Engagement (Volunteerism/Tours with Company)

This Year:

- Identified 24 Top Tier Accounts (Based on Churn & Revenue)
 - Represent 3,958 donors & \$1,971,000. Accounted for **\$273,000** in Churn.
- Build Year Round Communication Plan with Donors not the Company (but aligned w/ campaign dates)
 - Mapped out Quarterly
 - Best Practices Model -Storytelling/ROI/THANK YOU {Example: Twin Cities and Paul/CANDO}
- Pre-Campaign Telethons (3 Scheduled through October)
 - Exp. Spring Telethon for Pre-leadership
- Pipeline 450 Individual Donors assigned to RD Staff
- WLC/EPP
- CEO Calls: 85 annual. 40 met/scheduled by Sept 30th. 27 currently.

2015-16 Tactics: Look Back at Direct Giving

Spring

Goals

\$ to Raise: \$35,000. Raised: \$24,519

of people reached out to directly: 24,500

20,000 in email contact list

2,250 direct and lapsed donors

1,000 Facebook

1,200 twitter

of donors/respondents: 490

of donors 102 (\$75 average gift)

Total Cost: \$1,837 (+\$900 MobileCause)

Return: \$22,682

Giving	As of July 6		
Direct Giving Campaign GOAL	\$35,000	(\$10,481)	
Direct Giving Campaign TOTAL	\$24,519	70%	
Direct Mail	\$12,172	50%	
Online	\$10,399	42%	
Mobile giving	\$1948	8%	
Total Donors	102		
Average Gift	\$240		
Giving Ranges	Total Gifts	% of Giving	% of Donors
Leadership \$1000+	\$16,800	69%	6%
\$250-\$999	\$3,367	14%	8%
\$100-\$249	\$2,599	11%	22%
\$50-\$99	\$750	3%	15%
\$5-\$45	\$1003	4%	51%

Comparative:

Direct Mail Date	Date range reported on	# of Responses in range	\$ raised in range	RoR	# within range of mailing	\$ within range of mailing	RoR
12/1-12/30/2014	10/28/2014-1/6/2015	205	\$71,770.74	0.70%	117	\$47,135.00	0.40%
5/6-7/6/2015	3/6/2015-7/6/2015	102	\$24,519.00	0.41%	86	\$7,812.00	0.40%

Dare to Care

Rick Meeder

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Ice Bucket Challenge



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Dare to Care



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Dare to Care

- 1. Participate in Day of Caring on Friday, Sept. 18th - either as an individual or by rallying a team at your workplace,**
- 2. Donate a backpack with school supplies to the Back to School effort,**
- 3. Or post a photo or video on social media of you doing good in your community and extend the Dare to Care to three people.**
 - And remember to tag United Way of Pierce County and use the hashtag #DareToCare**

Rescue Mission

Kari Young

Donor Relations/Major Gifts Officer

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Adjournment

Jamey McCormick

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