



United Way for Greater Austin

2000 E. MLK Jr. Blvd.
Austin, TX 78702-1340
Phone: 512-472-6267
Fax: 512-482-8309
www.unitedwayaustin.org

Annual Report July 2011 – June 2012

The Year in Review

A New Name: In May 2012 United Way Capital Area (UWCA) changed its name to United Way for Greater Austin (UWATX) to more clearly reflect the city at the heart of the organization's service area.

Employee Campaign: Employees at more than 300 Austin-area companies helped to change people's lives and make lasting community change through their donations during the UWCA 2011 Campaign. Thirteen of the Top 15 campaigns increased their campaign goals during the 2011 Campaign making an additional impact. Joining these longstanding campaigns were the Combined Federal Campaign and the State Employee Giving Campaign, with more than 10,000 public sector employees contributing to the needs of their community, as well as six new business campaigns.

Disaster Response: In September 2011, wildfires devastated Bastrop County and Spicewood, Texas. More than 1,000 callers to the United Way Navigation Center's 2-1-1 program were connected to information about the wildfires, particularly related to evacuation, debris clean-up, clothing and supplies, case management, donating goods and funds, and volunteering. The United Way Navigation Center furthered response efforts by facilitating organization, coordinating activities, and initially leading Bastrop County's committee for long-term recovery, working closely with long-term disaster recovery leaders and members of nonprofit, faith-based, government, and business-related organizations. United Way Capital Area raised and distributed more than \$125,000 towards long-term relief and recovery.

United Way Navigation Center: The United Way Navigation Center continued to help callers find health care resources through referrals to low-cost clinics and immunizations programs, screenings for local and state health insurance benefits programs, and appointments to help them receive those benefits. To enhance its health care navigation program, the UWNC partnered with insure-a-kid (IAK) in 2011 to screen callers for eligibility for the Children's Health Insurance Program (CHIP) and make application assistance appointments for qualified callers. The UWNC also implemented a health care linkage database for navigators to see at a glance which low-cost clinics are accepting clients without insurance if they are ineligible for public health insurance programs.



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Strategic Programs: More than 9,000 young children, their families and their early education centers received support through Success By 6 grants and initiatives. More than 1,000 children on three middle school campuses received services before, during and after the school day thanks to Middle School Matters. Through the support of Financial Opportunity, over 6000 new bank accounts were opened through the Bank On Central Texas program, and more than 16,000 families benefited from having their taxes prepared for free at a community tax center.

Mission Statement

We inspire, lead and unite an eclectic community of philanthropists including individuals, nonprofits, business, and government to overcome barriers to economic opportunities and ensure Greater Austin continues to thrive.

Board of Directors

Becky Arreaga, Founder & Partner, Mercury Mambo; 5-2012 – 5-2015
Marie Baker, Retired, CSC; 1-1-2010 – 12-31-2012 (Secretary)
Ben Bentzin, CEO, Interactive Health Technologies, Inc; 10-19-2011 – 10-19-2014
Mike Blue, Office Managing Partner, Ernst & Young, LLP; 1-1-2011 – 12-31-2013 (Treasurer)
Ray Bonilla, Partner, Ray, Wood & Bonilla; 2-5-2009 – 12-31-2011
Debbie Bresette, President United Way for Greater Austin; nonvoting member
Heather Brunner, COO, Bazaarvoice; 1-1-2010 – 12-31-2012
Sam Bryant, Owner, Bryant Wealth Investment Group; 1-1-2006 – 12-31-2011
Kevin Cole, The Cole Law Firm; 3-21-2007 - 12-31-2012 (Chair, retired during year)
Juan Gonzalez, Senior Lecturer in Higher Education Administration, College of Education University of Texas at Austin; 1-1-2010 – 12-31-2012
Gayle Greer, Retired, Time Warner Entertainment; 7-7-2011 – 7-1-2014
Butch Hayes, Managing Partner, Fulbright & Jaworski; 1-1-2010 – 12-31-2012
Tommy H Dinh, Founder and CEO, MagRabbit; 5-2012 – 5-2015
Don Kendrick, Regional President, Wells Fargo's Central Texas Region; 10-19-2011 – 10-19-2014
Becky Moeller, President, Texas AFL-CIO; 5-2012 – 5-2015
Catherine Morse, General Counsel and Director of Public Affairs, Samsung Austin; 1-1-2011 – 12-31-2013
Bill O'Brien, Retired, Vice President IBM; 1-1-2010 – 12-31-2012 (new Chair)
Kristy Ozmun, Director, Kristy Ozmun Public Relations; 1-1-2011 – 12-31-2013



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Sheila Plank, Retired, President and CEO, SBPlank Associates; 10-19-2011 – 10-19-2014
Anne Smalling, Owner, HM International; 1-1-2005 – 12-31-2011 (extended as past chair)
Denise M. Trauth, President, Texas State University; 12-2011 – 12-2014
Bill Volk, Partner, Vinson & Elkins, LLP; 8-14-2007 – 12-13-2013

Board members are elected for three-year terms; board members can accept an additional second term of three years if asked. Board Chair may serve for an extra year.

Locations and Dates of Board of Directors Meetings

July 21, 2011 UWATX Offices, 2000 E. MLK Jr. Blvd. Austin, TX 78702

September 15, 2011 UWATX Offices, 2000 E. MLK Jr. Blvd. Austin, TX 78702

October 20, 2011 UWATX Offices, 2000 E. MLK Jr. Blvd. Austin, TX 78702

November 17, 2011 UWATX Offices, 2000 E. MLK Jr. Blvd. Austin, TX 78702

January 19, 2012 UWATX Offices, 2000 E. MLK Jr. Blvd. Austin, TX 78702

February 02, 2012 Vinson & Elkins Law Office, 2801 Via Fortuna Blvd., Suite 100, Austin TX 78746

March 15, 2012 UWATX Offices, 2000 E. MLK Jr. Blvd. Austin, TX 78702

April 19, 2012 UWATX Offices, 2000 E. MLK Jr. Blvd. Austin, TX 78702

May 24, 2012 UWATX Offices, 2000 E. MLK Jr. Blvd. Austin, TX 78702

June 21, 2012 UWATX Offices, 2000 E. MLK Jr. Blvd. Austin, TX 78702

Staff

Debbie Bresette, President

Jeff Brennan, Chief Financial Officer

Lauren Paver, Chief Operating Officer

Debbie McGee, Vice President of Resource Development (starting April 2012)

Meredith Cohen, Vice President of Resource Development (ending February 2012)



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United Way for Greater Austin Financial Statement

United Way for Greater Austin
Statement of Activities - Year Ended June 30, 2012
(dollars in thousands)

Revenue

Total amounts raised	13,692.2
less amounts designated by contributors for specific organizations	(8,462.6)
Grants and contracts	1,640.4
Service fee income	347.8
All other	(42.5)
Total revenues, gains and other support	<u>7,175.3</u>

Expenses

Total allocations and program services	5,566.7
Fundraising	1,619.3
Management and general	654.9
Total allocations and expenses	<u>7,840.9</u>

Change in net assets	(665.6)
Beginning net assets	2,393.2
Ending net assets	<u><u>1,727.6</u></u>

Maxwell Locke & Ritter, LLP, CPAs conducted a financial audit of United Way for Greater Austin. To receive a copy of the audit, please contact the United Way for Greater Austin office.



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CFC Requirement

United Way for Greater Austin (UWATX) as the Principal Combined Fund Organization (PCFO) certifies that it prepares and makes available to the public, upon request, an annual report that includes a full description of the organization's activities and supporting services and identifies its directors and chief administrative personnel. As PCFO, UWATX maintains a line item budget that details all estimated costs required to operate the Central Texas CFC. The budget contains sufficient details for the Local Federal Coordinating Committees (LFCC) to understand the cost associated with operating the CFC. The budget is prepared based on projected expenses and is not based on a percentage of the funds raised in the campaign. UWATX absorbs campaign costs exceeding 110 percent of the approved budget unless any overage is approved by the Director of CFC Operations at OPM. UWATX recovers the actual costs from the gross receipts for administering the local campaign. UWATX will not recover expenses in excess of 10 percent of the estimated budget submitted. The campaign expenses are shared proportionately by all the recipients according to their percentage share of gross campaign contributions. UWATX's administrative rate is 13.91 percent and UWATX does not charge any dues from its affiliated agencies.