



United Way for Greater Austin

2000 E. MLK Jr. Blvd
Austin, TX 78702-1340
Phone: 512.472.6267
Fax: 512.482.8309
unitedwayaustin.org

Annual Report July 2012 – June 2013

The Year in Review

Re-introducing UWATX to the community: After changing our name to better reflect the community we serve, we re-introduced UWATX to the community with a new website and a first-of-its-kind media campaign that leveraged in-kind donations from community partners.

Butter Half mural becomes an Austin icon: We painted the Butter Half mural with Creative Suitcase in April 2012 as a valentine to the city we're committed to serve. This large-scale artwork reflects our mission to bring people together. In just a year, the Butter Half mural spread throughout Greater Austin and became a go-to spot for couples to take engagement photos.

Success! UWATX supporters restore \$500K for early childhood: When the City of Austin approved its budget in September 2012, it included a significant win for the youngest and most vulnerable children in Austin: the City restored approximately \$500,000 in funding for services to young children. This increased funding came after robust advocacy efforts from UWATX supporters.

Early results show Target Graduation is changing schools: In year two of our innovative Middle School Matters project, UWATX research shows our work with middle school students is getting results: we delivered more than 3,000 interventions (sessions in behavioral health, case management, mentoring, out-of-school time, parent education and tutoring) at our three target middle schools and 83 percent of teachers reported an improved experience. Overall, we served 1,400+ middle school students!

Getting out the word about the need for bank accounts: We undertook an ambitious project to raise awareness about the benefits of a bank accounts. We got on the radio, went online and spoke in-person at events to tell people about their options and how a bank account could help them. And we succeeded – we reached thousands of individuals and the number of online inquiries about the program skyrocketed.

Young Leaders Society makes a commitment to middle school students: After a few years of stagnation, dedicated professionals relaunched the UWATX Young Leaders Society with a new focus on our work in middle school. This new iteration focuses on volunteerism and hands-on work with middle school campuses and allows young philanthropists to give or raise their contribution.

Growing philanthropy across Greater Austin: The philanthropic movement in Austin was strong this year: 500 professional women gave \$1.2M to support early childhood, employees at 400+ local companies raised \$16M through Employee Giving Campaigns and 25,000 volunteers gave 161,000 hours of support through our Hands On Central Texas program.



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Board of Directors

Jon Armstrong, Business Consultant; 8-12-8-15

Becky Arreaga, Founder & Partner, Mercury Mambo; 5-2012 – 5-2015

Marie Baker, Retired, CSC; 1-10 – 12-12; 1-13 – 12-15 (Secretary)

Ben Bentzin, CEO, Interactive Health Technologies, Inc; 10-19-2011 – 10-19-2014; Resigned 6-13

Mike Blue, Office Managing Partner, Ernst & Young, LLP; 1-8 – 12-10; 1-1-2011 – 12-31-2013
(Treasurer)

Debbie Bresette, President United Way for Greater Austin; nonvoting member

Heather Brunner, COO, Bazaarvoice; 1-10 – 12-12; 1-13 – 12-15

Juan Gonzalez, Senior Lecturer in Higher Education Administration, College of Education
University of Texas at Austin; 1-1-2010 – 12-31-2012; 1-13 – 12-15

Dan Graham, Founder and CEO, BuildASign.com, 8-12 – 8-15

Gayle Greer, Retired, Time Warner Entertainment; 7-7-2011 – 7-1-2014

Butch Hayes, Managing Partner, Fulbright & Jaworski; 1-10 – 12-12; 1-13 – 12-15

Tommy Hodyn, Founder and CEO, MagRabbit; 5-2012 – 5-2015

Philip Huang MD, MPH Medical Director and Health Authority, Austin / Travis County Health
Department, 8-12 – 8-15

Don Kendrick, Regional President, Wells Fargo's Central Texas Region; 10-19-2011 – 10-19-
2014

Heather Ladage Publisher, Austin Business Journal, 1-13 – 12-15

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; 1-13 – 12-15 (Chair)

Kristy Ozmun, Director, Kristy Ozmun Public Relations; 1-08 – 12-10; 1-1-2011 – 12-31-2013

Sheila Plank, Retired, President and CEO, SBPlank Associates; 10-19-2011 – 10-19-2014

Jeff Thomas, Senior Vice President – General Manager, H-E-B – Central Texas Region 1-13 – 12-15

Denise M. Trauth, President, Texas State University; 12-2011 – 12-2014

Bill Volk, Partner, Vinson & Elkins, LLP; 8-14-2007 – 12-13-2013

Howard Zaroff, Vice President/General Manager, Enterprise Holdings 8-12 – 8-15

Kevin Cole, The Cole Law Firm; 3-21-2007 - 12-31-2012 (Chair, retired during year)

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.



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Locations and Dates of Board of Directors Meetings

July 19, 2012 UWATX Offices, 2000 E. MLK Jr. Blvd. Austin, TX 78702
September 20, 2012 UWATX Offices, 2000 E. MLK Jr. Blvd. Austin, TX 78702
October 18, 2012 UWATX Offices, 2000 E. MLK Jr. Blvd. Austin, TX 78702
November 15, 2012 UWATX Offices, 2000 E. MLK Jr. Blvd. Austin, TX 78702
January 17, 2013 UWATX Offices, 2000 E. MLK Jr. Blvd. Austin, TX 78702
February 22, 2013 Vinson & Elkins Law Office, 2801 Via Fortuna Blvd., Suite 100, Austin TX 78746
March 21, 2013 UWATX Offices, 2000 E. MLK Jr. Blvd. Austin, TX 78702
April 18, 2013 UWATX Offices, 2000 E. MLK Jr. Blvd. Austin, TX 78702
May 16, 2013 UWATX Offices, 2000 E. MLK Jr. Blvd. Austin, TX 78702
June 20, 2013 UWATX Offices, 2000 E. MLK Jr. Blvd. Austin, TX 78702

Staff

Debbie Bresette, President
Jeff Brennan, Chief Financial Officer (ending August 2012)
Lauren Paver, Chief Operating Officer (ending November 2012)
Debbie McGee, Vice President of Resource Development
Heather Beckel Luecke, Vice President of Brand & Marketing
Peter Kreztschmar, Vice President of Strategic Programs
Cheryl Black, Vice President of Operations and Finance

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.



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United Way for Greater Austin Financial Statement

United Way for Greater Austin

Statement of Activities - Year Ended June 30, 2013

(dollars in thousands)

Revenue

Total amounts raised	139,931.4
less amounts designated by contributors for specific organizations	(8,717.2)
Grants and contracts	1,787.2
Service fee income	412.7
All other	681.2
Total revenues, gains and other support	<u>8,095.8</u>

Expenses

Total allocations and program services	3,561.8
Fundraising	1,394.0
Management and general	377.9
Total allocations and expenses	<u>5,333.7</u>

Change in net assets	2,762.1
Beginning net assets	<u>1,727.6</u>
Ending net assets	<u><u>4,489.7</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.