



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 2013 – June 2014 The Year in Review

**UWATX Business Partnerships:** Featuring the iconic “Greetings from Austin” mural, the UWATX Business Brochure debuts as an insert in 10,000 Austin Business Journals in September 2013, reminding the community of the mission, vision and impact of the philanthropy raised by UWATX.

**Philanthropic Impact Calculator:** As more donors confirm their interest in knowing the exact impact of their gifts, UWATX developed the “Impact Calculator” allowing donors to fill their gift in and see how it translates in the community. Visit the Impact Calculator at [www.uwatx.org/impact](http://www.uwatx.org/impact). The Calculator is used in many face-to-face meetings with donors.

**2013 Success By 6 Progress Report is released:** Thanks to the UWATX Success By 6 program, 9,900 children’s lives were impacted and improved by quality early childhood investments. The report, along with healthy news for expecting moms, is shared at the 2013 Women’s Leadership Council Luncheon.

**Play To Learn Success Announced:** After an 18-month evaluation of Play To Learn, UWATX’s innovative initiative is confirmed a success in December 2013. Of the 200 families who participated, an astonishing 93 percent (198 families) completed the 8-week in-person sessions as well as the year-long library portion. Data reported that families experienced reduced depressive symptoms, and parents supported their children’s developmental needs more.

**Target Graduation is changing schools:** In year three of our innovative Middle School Matters project, UWATX connected the re-launched Young Leaders Society with the needs of three middle school campuses (Webb, Mendez, and Decker) to support the schools from a volunteer aspect in addition to the \$1,000,000 UWATX was investing to connect valuable resources to the students.

**Insurance Industry Challenge Success:** With a goal to connect and increase the impact of the insurance industry in Austin, 13 Austin-area insurance companies, led by volunteers, raised more than **\$350,000** through their UWATX campaigns to support the efforts of United Way for Greater Austin.

**90 years: Growing philanthropy across Greater Austin:** Celebrating 90 years of growing philanthropy and volunteerism in Austin, UWATX held an event highlighting the changing face of poverty in our community as well as a digital timeline of the 90 years of “making Austin greater”. Visit the timeline at: [www.uwatx.org/timeline](http://www.uwatx.org/timeline)

**UWATX Mission:** 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.



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## Board of Directors

Jon Armstrong, Business Consultant; 8/1/2012-8/1/2015 (Secretary)  
Becky Arreaga, Founder & Partner, Mercury Mambo; 5/1/2012 – 5/1/2015  
Marie Baker, Retired, CSC; 1/1/2010– 1/1/2015  
Don Baylor, Senior Policy Analyst, Economic Opportunity, Center for Public Policy Priorities, 7/1/2014 – 7/1/2017  
Jeremiah Bentley, Senior Manager of Corporate Communications, Texas Mutual Insurance Company, 7/1/2014 – 7/1/2017  
Debbie Bresette, President United Way for Greater Austin; nonvoting member  
Heather Brunner, CEO, WP Engine; 1/1/2010 – 12/1/2015  
Judy Donigan, National Account Manager, 3M, 7/1/2014 – 7/1/2017  
Kathleen Farlow, Central Texas Managing Partner, Deloitte, 12/1/2012-12/1/2015 (Treasurer)  
Jennifer Foster, Financial Services Director for APJ strategy, Dell, 7/1/2014 – 7/1/2017  
Juan Gonzalez, Senior Lecturer in Higher Education Administration, College of Education University of Texas at Austin; 1/1/2010 – 07/1/2014  
Dan Graham, Founder and CEO, BuildASign.com, 8/1/2012 – 8/1/2015  
Butch Hayes, Managing Partner, Fulbright & Jaworski; 1/1/2010 – 07/1/2014  
Tommy Hodinh, Founder and CEO, MagRabbit; 5/1/2012 – 5/1/2015  
Philip Huang MD, MPH Medial Director and Health Authority, Austin / Travis County Health Department, 8/1/2012 – 8/1/2015  
Aletha Huston, Pricilla Pond Flawn Regents Professor of Child Development, The University of Texas at Austin 1/1/2014-1/1/2017  
Bobby Jenkins, Owner, ABC Home & Commercial Services, 12/1/2013 – 12/1/2016  
Don Kendrick, Regional President, Wells Fargo's Central Texas Region; 10/1/2011 – 10/1/2015  
Heather Ladage Publisher, Austin Business Journal, 1/1/2013 – 12/1/2015  
Catherine Morse, General Counsel and Director of Public Affairs, Samsung Austin; 1/1/2011– 12/1/2016 (Chair)  
Rodney Northern , Senior Vice President, Director of Client Service for Sanders Wingo Advertising 12/1/2013 – 12/1/2016  
Bill O'Brien, Retired, Vice President IBM; 1/1/2010 – 07/1/2014  
Jennifer Poppe, Partner, Vinson & Elkins, 7/1/2014 – 7/1/2017  
Mark Strama, VP, Google Fiber, 12/1/2013 – 12/1/2016  
Jeff Thomas, Senior Vice President General Manager, H-E-B Central Texas Region 1/1/2013 – 12/1/2015  
Bill Volk, Partner, Vinson & Elkins, LLP: 8/1/2007 – 7/1/2014  
Howard Zaroff, Vice President/General Manager, Enterprise Holdings 8/1/2012 – 8/1/2015

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 18, 2013 UWATX Offices, 2000 E. MLK Jr. Blvd. Austin, TX 78702  
September 19, 2013 UWATX Offices, 2000 E. MLK Jr. Blvd. Austin, TX 78702  
October 17, 2013 UWATX Offices, 2000 E. MLK Jr. Blvd. Austin, TX 78702  
November 21, 2013 UWATX Offices, 2000 E. MLK Jr. Blvd. Austin, TX 78702  
January 16, 2014 UWATX Offices, 2000 E. MLK Jr. Blvd. Austin, TX 78702  
February 20, 2014, UWATX Offices, 2000 E. MLK Jr. Blvd. Austin, TX 78702  
March 20, 2014 UWATX Offices, 2000 E. MLK Jr. Blvd. Austin, TX 78702  
April 17, 2014 UWATX Offices, 2000 E. MLK Jr. Blvd. Austin, TX 78702  
May 22, 2014 UWATX Offices, 2000 E. MLK Jr. Blvd. Austin, TX 78702  
June 19, 2014 UWATX Offices, 2000 E. MLK Jr. Blvd. Austin, TX 78702

### **Staff**

Debbie Bresette, President  
Debbie McGee, Vice President of Resource Development  
Heather Beckel Luecke, Vice President of Brand & Marketing  
Peter Kretzschmar, Vice President of Strategic Programs (End 2-2014)  
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 9.73 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, 2014

(dollars in thousands)

### Revenue

Total amounts raised	14,815.9
less amounts designated by contributors for specific organizations	(8,417.4)
Grants and contracts	2,440.3
Service fee income	319.4
All other	114.0
Total revenues, gains and other support	9,272.2

### Expenses

Total allocations and program services	6,974.5
Fundraising	1,277.0
Management and general	429.6
Total allocations and expenses	8,681.0

Change in net assets	591.2
Beginning net assets	4,490.0
Ending net assets	5,081.0

Maxwell Locke & Ritter, LLP, CPAs conducted a financial audit of United Way for Greater Austin. To receive a copy of the audit, please visit [www.uwatx.org/financials](http://www.uwatx.org/financials).