



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 2014 – June 2015 The Year in Review

United Way for Greater Austin (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.

Strategic Programs--: The following is a summary of the year's achievements through UWATX major programs.

211 Navigation Center: The UWATX Navigation Center helps meet the needs of the community by offering callers one-call access to health care and various human services, such as finding rent assistance, employment assistance, food, child care, disaster response, and State of Texas benefits. The UWATX Navigation Center partners with 2-1-1 Texas through the Texas Health and Human Services Commission to help individuals navigate more than 30,000 services statewide.

Progress in 2014-15:

- The UWATX Navigation Center answered more than 280,000 calls from a 10-county service area, with the largest number of calls from Travis County and the Greater Austin Area.
- Began partnerships to coordinate client support access with several area clinic networks including El Buen Samaritano Episcopal Mission and Bluebonnet Trails Community Services. In partnership with It's Time Texas, launched Choose Healthier Coach Hotline and completed a proof-of-concept research project with the UT School of Public Health.
- Developed a 2-1-1 Mobile Application to streamline access to social service information across mobile devices, ensuring resource information is available when and where it is needed.
- The UWATX Navigation Center also provides referrals to a growing number of community-wide initiatives. These include community tax centers for free tax preparation services, summer food service programs that provide lunch to children in need during the summer, literacy services, prenatal care, and back-to-school immunization programs.
- UWATX began a partnership with Central Health in 2009 to make it easier for individuals to qualify for state and federal health care benefits like CHIP and the Travis County Medical Access Program. In 2013, the UWATX Navigation Center expanded this partnership to have 2-1-1 serve as community focal point for Health Insurance Market place for local resources as well as contracted with local agencies to provide application assistance and enrollment for Travis County.



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- Last year, the UWATX Navigation Center provided in-person outreach to over 31,000 Central Texans through trainings for social service providers and community resource fairs for the general public.

“Success By Six” program progress: Success By 6 serves the Greater Austin community in three ways:

- 1) Facilitating early childhood systems’ change by leading the work of the School Readiness Action Plan;
- 2) Creating and managing special projects including “Play To Learn” and “The Center Project”; and
- 3) Funding evidence-based programming that benefits low-income children and families in our community.

Success By 6 facilitated the work of a large community coalition mobilized around the School Readiness Action Plan for Travis County. Progress towards the identified community goals, strategies, and performance measures are monitored throughout the year and a year-end report was published and disseminated to share successes and bright spots.

Success By 6 began a 3rd year of implementation of a project designed to address a critical unmet community need for accessible, affordable early learning programs. The special project, called Play To Learn, combines parent education, early education, and technology tools to support over 200 low-income families with young children through a six-month, community-based program. This year, we received a grant from the Housing Authority to expand the programming to their residents. The City of Austin is also providing funding to Play To Learn partners to off-set staff and operating expenses. Another special project, the Success By 6 Center Project, was expanded in 2014-15. This project provides coordinated services to 13 target child care centers serving low-income families. Based on the individual center needs, the project deployed classroom coaches, substitute teachers, professional development, director mentoring, and mental health services for children with challenging behaviors. This special project serves nearly 1000 children annually. Data analyzed in 2015 showed that participating children gained 17 months of language skills over a 7 month period.

In addition to the SB6 special projects, over 8,000 families benefitted from additional Success By 6 grant-funded programming during the year. A range of services were provided ranging from home visiting, high-quality early education in child care settings, evidence-based parent education classes, mental health services, and book distributions.

“Target Graduation” is changing schools: United Way for Greater Austin’s Target Graduation program ensures high-risk youth are on the path to high school graduation by implementing broad, system-wide interventions to positively impact individual student performance and the culture of learning. Through deep and broad partnerships with nonprofits and schools, Middle School Matters strives to ensure students have a wide range of academic, health, and social services. Target Graduation supports student resilience, strengthens families and engages students with the surrounding community through high-quality programming.



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2014-2015 Progress:

- 1,354 students served on target campuses
- 2,702 interventions provided to students
- 250 out-of-school time professionals received training through the Youth Program Quality Initiative
- 144 students served through the Target Graduation Summer Learning Camp at Decker and Mendez Middle Schools
 - 17,280 hours of programming delivered through Summer Learning Camp

“Financial Stability” program success: United Way for Greater Austin’s Financial Stability helps families and individuals have the income, skills, and community resources to overcome tough times, become financially stable, and thrive. To achieve this, United Way for Greater Austin provides financial education classes, financial coaching, free tax preparation services, ESL classes for parents with children, savings programs, and classes for social workers and front line staff.

2014-2015 Progress:

Key financial stability programs were developed and delivered throughout the greater Austin area that included:

- United Way provided Learn Where You Earn financial education classes in the workplace for over 500 participants on topics including budgeting, credit, and debt management.
- United Way, in partnership with other area nonprofits, supported free tax preparation services to over 20,000 low-income clients bringing back \$32,000,000 of tax returns back to the Austin area.
- United Way continued the training seminar, called the Financial Empowerment Boot Camp, to teach over 90 case managers and social service workers how to integrate financial education into their client services.
- United Way helped over 2000 individuals navigate safe and affordable banking options through Bank On Central Texas’ online Bank Locator tool.
- United Way helped over 21 low income employees open bank accounts and save for the first time. Employees have continued to save over \$8,000 for over a year in the program.
- United Way helped low income parents receive ESL classes while their children received high-quality early childhood education through a two-generation approach.
- United Way through a partnership with a local nonprofit helped over 50 families receive stable housing in addition to financial coaching.



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Board of Directors

Last Name	First Name	Title	Company/Organization
Armstrong	Jon	Consultant	
Arreaga	Becky	President	Mercury Mambo
Baker	Marie	Retired	CSC
Bentley	Jeremiah	Senior Mgr. of Corp Communications	Texas Mutual Ins.
Bresette	Debbie	President	United Way
Brunner	Heather	CEO	WP Engine
Donigan	Judy	National Account Manager	3M
Farlow	Kathleen	Managing Partner	Deloitte
Foster	Jennifer	Director for APJ	Dell
Graham	Dan	CEO	Build A Sign
Hodinh	Tommy	CEO	MagRabbit, Inc.
Huston	Aletha	Priscilla Pond Flawn Regents Professor	University of Texas at Austin
Huang	Philip	Medical Director, Health Authority	Austin/Travis Cty Health&Human Svc
Jenkins	Bobby J.	Owner	ABC Home & Commercial Services
Kendrick	Don	Regional President	Wells Fargo Central Texas Region
Ladage	Heather	Publisher ABJ	Austin Business Journal
Morse	Catherine	General Council & Dir of Public Affairs	Samsung
Northern	Rodney	Senior Vice President	Sanders Wingo
Poppe	Jennifer	Partner	Vinson & Elkins
Strama	Mark	Various	Google Fiber
Thomas	Jeff	Senior VP	HEB
Zaroff	Howard	Vice President & General Manager	Enterprise Rent-A-Car

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 17, 2014 UWATX Offices, 2000 E. MLK Jr. Blvd. Austin, TX 78702
September 18, 2014 Ruth's Chris Steakhouse, West 6th Street. Austin, TX 78702
October 16, 2014 UWATX Offices, 2000 E. MLK Jr. Blvd. Austin, TX 78702
November 20, 2014 Aletha Huston residence, (street address withheld), Austin, TX 78702
January 15, 2015 UWATX Offices, 2000 E. MLK Jr. Blvd. Austin, TX 78702
February 19, 2015, Texas Mutual Offices, 400 W. 14th Street. Austin, TX 78702
March 19, 2015 UWATX Offices, 2000 E. MLK Jr. Blvd. Austin, TX 78702
April 16, 2015 UWATX Offices, 2000 E. MLK Jr. Blvd. Austin, TX 78702
May 21, 2015 UWATX Offices, 2000 E. MLK Jr. Blvd. Austin, TX 78702
June 18, 2015 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
Leah Meunier, Vice President of Strategic Programs
Cheryl Black, Vice President of Operations and Finance (End February 2015)
Nichole Lopez-Riley, Vice President of Human Capital

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

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Statement of Activities - Year Ended June 30, 2015

(dollars in thousands)

Revenue

Total amounts raised	14,545
less amounts designated by contributors for specific organizations	(8,382)
Grants and contracts	2,041
Service fee income	408
All other	78
Total revenues, gains and other support	8,690

Expenses

Total allocations and program services	6,933
Fundraising	1,677
Management and general	621
Total allocations and expenses	9,231

Change in net assets	(541)
Beginning net assets	5,081
Ending net assets	4,540

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.