

**LIVE UNITED<sup>®</sup>**



**» ANNUAL REPORT 2009**



# UNITED WAY'S MISSION: *To improve lives by mobilizing community resources.*

United Way's unique approach to community problem solving maximizes resources and results. By pooling our individual contributions, each of us can address a wide range of health and human service needs with one gift.

United Way's goal is to create long-lasting change by addressing our community's most serious problems, focusing on the building blocks to a better life:

**EDUCATION:** Helping Children and Youth Achieve Their Potential

**INCOME:** Promoting Financial Stability and Independence

**HEALTH:** Providing Basic Needs on Improving People's Health & Safety

Everyone deserves opportunities to build a good life — a quality education that leads to a stable job, enough income to support a family through all of life's stages, good health and a safe home. When you give to United Way, you choose to be part of the solution.

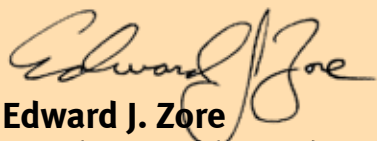
In 2009, more than 70,000 people turned their concern into action by giving to United Way despite their own economic uncertainty. Our community proved once again that there is hope if we come together to take care of each other. It showed that here in Greater Milwaukee, people put "we" before "me." That's what it means to Live United.

On behalf of the hundreds of thousands of people who will benefit from United Way programs in 2010...

**THANK YOU.**



**Mary Lou Young**  
President & CEO  
United Way of Greater Milwaukee



**Edward J. Zore**  
2010 Chairman of the Board  
United Way of Greater Milwaukee  
*Chairman & CEO*  
*Northwestern Mutual*



# COMMUNITY PROBLEM SOLVING



United Way's goal is to create long-lasting change by addressing our community's most serious problems in partnership with 160+ health and human service programs at over 80 local agencies. To achieve its goal, United Way focuses on the critical issue areas below:



## **EDUCATION** Helping Children & Youth Achieve Their Potential

Every parent's dream is for our children to succeed – and for their success to surpass ours. But today's young Americans are less likely to earn a diploma than their parents, a distinction not shared by any other industrialized country.

United Way wants to change that reality, and boost every child's chance for success in school, work and life.



## **INCOME** Promoting Financial Stability & Independence

As many as one-third of working Americans do not earn enough money to meet their basic needs. These individuals are walking a financial tightrope – they are barely able to get by, with no ability to save for college, a home, or for retirement.

United Way provides tools that help families increase and maximize their income in order to meet daily expenses, as well as to begin the longer-term process of saving and building assets.



## **HEALTH** Providing Basic Needs and Improving Health & Safety

Whether it is a child without food, a neighbor without health insurance, a victim of abuse, someone struggling with an addiction, or an older adult who can not afford prescriptions, health impacts every aspect of a person's daily life.

United Way ensures people have access to basic human needs like food and shelter, health and dental care, substance abuse and family violence prevention services, and prescription assistance to stay healthy and safe.

## 2009 HIGHLIGHTS

- » United Way increased health and human service funding in 2009, investing nearly \$40 million in community problem solving at a time of diminishing resources and unprecedented needs.
- » United Way awarded emergency grants totaling \$225,000 to 11 partner agencies in addition to and separate from annual funding to help meet the growing demand for services.
- » After a devastating fire at Patrick Cudahy, United Way responded quickly and awarded a \$25,000 emergency grant to Hunger Task Force to help feed Patrick Cudahy workers and their families through a food pantry organized and run by the Milwaukee County Labor Council, UFCW Local 1473, Hunger Task Force and United Way.
- » United Way continued to provide leadership and direction to Milwaukee's Teen Pregnancy Prevention Initiative. In November 2009, the City of Milwaukee Health Department announced that for a second year in a row, Milwaukee's teen birth rate had declined.



# CELEBRATING A MILESTONE

In 2009, United Way of Greater Milwaukee celebrated 100 years of strengthening our community – a true testament to its leadership, and its track record of achieving collaborative solutions.

As United Way builds new momentum in 2010 and beyond, it will continue to bring people together to address critical issues and invest in change. Lasting, communitywide results require a united focus on a common goal: a healthy, safe, thriving community. And it takes everyone working together to create a brighter future. That's what it means to Live United.

## MOBILIZING RESOURCES



United Way's 2009 Community Campaign raised \$45,535,143, with \$1,321,833 in net new dollars, or a 3% increase, exceeding its \$45 million goal during one of the most challenging economic times in history.



- 60+ campaign cabinet members and 300+ volunteers made it happen.
- 100th Anniversary fund raised more than \$1.1 million to meet urgent and emerging community needs.
- Our Women's Initiative, founded in 2002, is the largest in the nation, raising over \$11 million in 2009.
- Our Emerging Leaders, donors under 45 who give \$1,200+ annually, grew to 630+ members, raising \$1.2 million last year.
- More than 1,300 organizations made corporate contributions or ran employee giving campaigns.
- Over half of United Way's 70,000 donors gave \$100 or less; 32 donors gave \$100,000 or more last year.

## ACCOUNTABILITY

United Way of Greater Milwaukee only invests in programs that produce results at agencies that manage their money wisely.



United Way operates at a high rate of efficiency with nearly 90 percent of every dollar raised invested into community problem solving, far exceeding the 65-percent-minimum program investment that nonprofit watchdog Charity Navigator considers acceptable for a nonprofit to be living up to its mission.



# BOARD OF DIRECTORS 2010 - 2011



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**Edward J. Zore** | Northwestern Mutual



# STATEMENT OF FINANCIAL POSITION AS OF JUNE 30, 2009

## ASSETS:

Current assets:	
Cash and cash equivalents	\$ 3,338,193
Investments	6,823,947
Pledges receivable—net	11,440,021
Prepaid expenses and other	17,297
<b>Total current assets</b>	<b>21,619,458</b>
Pledge receivable, less current portion	987,187
Investments—Endowment fund	3,193,247
Land, building, and equipment—net	953,047
Other assets	487,575
<b>Total assets</b>	<b>\$ 27,240,514</b>

## LIABILITIES & NET ASSETS:

### Liabilities:

Current liabilities:	
Donor designations payable	\$ 4,088,097
Amounts payable under fiscal agent responsibilities	1,643,912
Grants payable	1,204,650
Other amounts payable	171,263
Accrued payroll and other current liabilities	629,383
<b>Total current liabilities</b>	<b>7,737,305</b>
Other liabilities	487,575
<b>Total liabilities</b>	<b>8,224,880</b>

### Net assets:

Unrestricted:	
Undesignated	(7,125,296)
Investment in land, building, and equipment	953,047
Accumulated net growth in permanently restricted net assets	17,189
Board designated for allocations to member agencies and partners	20,756,804
Board designated endowment fund	142,401
Board designated for capital improvements	409,997
<b>Total unrestricted</b>	<b>15,154,142</b>
Temporarily restricted	2,694,774
Permanently restricted net assets	1,166,718
<b>Total net assets</b>	<b>19,015,634</b>
<b>Total liabilities and net assets</b>	<b>\$ 27,240,514</b>

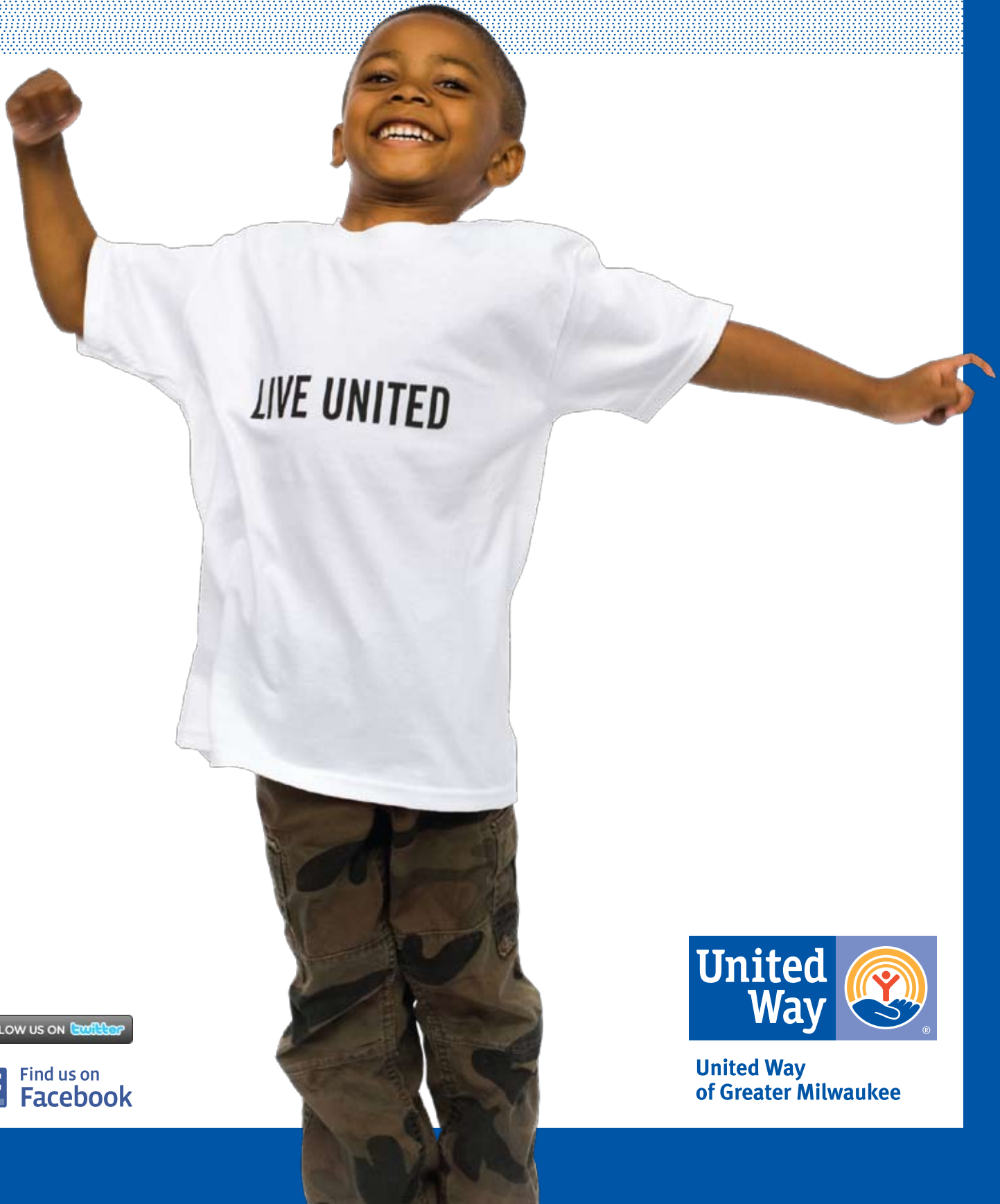
# STATEMENT OF ACTIVITIES

YEAR ENDED JUNE 30, 2009

	Unrestricted	Temporarily Restricted	Permanently Restricted	Total
<b>Public Support &amp; Revenue</b>				
Campaign revenue:				
Gross campaign results	\$ 41,976,474	\$ 917,605	\$ -	\$ 42,894,079
Less: Donor designated funds	(16,406,661)	(222,836)	-	(16,629,497)
Net campaign results	25,569,813	694,769	-	26,264,582
Less: Provision for uncollectible pledges	(688,719)	(33,500)	-	(722,219)
Net campaign revenue	24,881,094	661,269	-	25,542,363
Contributions received in prior period released from restriction	671,143	(671,143)	-	-
Contributions received in current period released from restriction	208,700	(208,700)	-	-
Service fees – Campaign	450,759	-	-	450,759
Memorials and bequests	85,730	-	-	85,730
Sponsorship of United Way events and activities	338,863	-	-	338,863
Total campaign revenue	26,636,289	(218,574)	-	26,417,715
Non-campaign revenue:				
Dividend & interest income	315,746	59,367	-	375,113
Net realized & unrealized loss on investments	(1,555,626)	(366,293)	-	(1,921,919)
Transfer to unrestricted fund for Wolverton fund disbursement	51,344	(51,344)	-	-
Rental income and other	73,668	-	-	73,668
Total non-campaign revenue	(1,114,868)	(358,270)	-	(1,473,138)
<b>Total revenue</b>	<b>\$ 25,521,421</b>	<b>\$ (576,844)</b>	<b>-</b>	<b>\$ 24,944,577</b>
<b>Expenses</b>				
Agency distributions:				
Gross agency distributions	\$ 38,114,261	\$ 222,836	-	\$ 38,337,097
Less: Donor designated funds	(16,406,661)	(222,836)	-	(16,629,497)
Net agency distributions	21,707,600	-	-	21,707,600
Program services: Community impact	1,302,165	-	-	1,302,165
Supporting services:				
Fundraising	3,912,756	-	-	3,912,756
Management and general	1,474,482	-	-	1,474,482
Total supporting services	5,387,238	-	-	5,387,238
<b>Total expenses</b>	<b>\$ 28,397,003</b>	<b>-</b>	<b>-</b>	<b>\$ 28,397,003</b>
<b>Change in net assets</b>	<b>(2,875,582)</b>	<b>(576,844)</b>	<b>-</b>	<b>(3,452,426)</b>
Net assets at beginning of year	18,029,724	3,271,618	1,166,718	22,468,060
<b>Net assets at end of year</b>	<b>\$ 15,154,142</b>	<b>\$ 2,694,774</b>	<b>\$ 1,166,718</b>	<b>\$ 19,015,634</b>

# GIVE. ADVOCATE. VOLUNTEER. LIVE UNITED®

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