

2015

ANNUAL REPORT

FOR

UNITED WAY OF COMAL COUNTY



**United Way
of Comal County**

OVERVIEW

In 2015 the United Way of Comal County saw a community that stepped up to provide support in active economic growth, the closure to the 2014-2015 Allocation cycle, and the beginning of the 2015-2016 Allocation cycle. During the last half of the year, the UWCC funded 28 various agencies throughout Comal County.

The state of the economy continued to have an impact on both fundraising and requests for funds. Funding from our residents who live within Comal County but commute to San Antonio for employment was on the rise with support from various national accounts and individual donors. Support from our local businesses and individual donors was up allowing the total pledges for the 2014 campaign to reach \$909,612.24 which exceeded the campaign goal of \$900,000.. The UWCC board agreed to allocate \$675,000 for the July, 2015 thru June, 2016 cycle.

Tremendous growth in the last decade has meant a corresponding growth in needs for our community. On a day-to-day basis, our agencies provided a range of services including early childhood intervention, youth services, shelters, family crisis assistance, and senior citizen activities.

UNITED WAY OF AMERICA STANDARDS

In 2004, United Way Worldwide adopted Standards of Excellence to provide concrete guidance and direction for how a local United Way should operate to be a more effective community impact leader. The 34 standards were intended to be aspirational and to answer the question, “What does excellence look like?” In 2005, a self-assessment based on the Standards of Excellence was launched and continues to be a useful tool in measuring public awareness.

A survey of these Standards, taken in 2015 by UWCC Board Members, staff, and volunteers, shows that UWCC continues to develop a shared community vision and supports efforts to affect positive change within Comal County.

In 2012 UWW launched the Business Performance Matrix which organizes United Ways based on their community profile – factors like corporate presence, population size and staff size – as well as performance executing on the United Way business model. This new Matrix changes UWCC from the old “Metro 6” measure label to “3A” which gives our United Way an opportunity to identify specific areas for continued improvement in:

- Program Impact on the Community
- Relations with Supporters (donors, advocates, and volunteers)
- Revenue
- Public Trust

Membership requirements with UWW include having a volunteer board of directors who approve the annual operating budget and distributions to the agencies, the accounting requirements of annual audits and filing our IRS Form 990 each year, a written Code of Ethics, and standard campaign reporting to United Way of America. Our audit for the year ended December 31, 2015, is being completed by Jim Robertson, an independent Certified Public Accountant and will be made available in our office for anyone to review.

We are proud to be meeting all Standards set forth by United Way Worldwide. As nonprofits come under additional review from Congress and the public, these standards are considered a model for nonprofit accountability. We proudly display our Recognition plaque and Membership in our office.

STAFF

The United Way of Comal County is staffed with a full-time Executive Director, a full-time Administrative Assistant, and a part-time bookkeeper. As the amount of funds raised has increased over the years so too has the workload (i.e. donation tracking, financial reporting, fundraising, allocations, reporting, etc.). All three staff people bring a high level of professionalism to the United Way.

AFFILIATION AND ALLOCATION

During the affiliation and allocation process, we targeted critical programs helping the residents of Comal County. Additionally, we added emphasis to the accountability of the funds to see that agencies had workable business plans to implement the programs they requested funding for and required quarterly financial reports and program status reports before allocation monies can be received.

The Allocation process itself includes volunteers and board members giving their time to conduct on-site visits of applicant agencies, completing scoring sheets for the reviews, and review of financial records. Face-to-face panel discussions were used as follow-ups to the questions that rose during the on-site visits. We were pleased to see the agencies strict adherence to the requirement of proper documentation of the audits and financial statements to ensure the donors' contributions were being invested in programs that truly make a difference in people's lives.

In the first 6 months of 2015, UWCC closed out its July, 2014 thru June, 2015 funding cycle by providing \$340,000 in funding for 27 agencies.

During the second six month period of 2015, UWCC began its July, 2015 thru June, 2016 funding cycle by providing \$344,063 in funding to 28 agencies. There was one new partner agency in 2015: Hope Hospice. This leaves a remaining balance of \$330,937 to be distributed the first half of calendar year 2016.

All agencies were divided into program service areas to get a better understanding of how the funds were allocated: Youth Services; Health and Healing; Families and Seniors; and Meeting Emergency Needs.

Total dollars allocated to United Way of Comal County partner agencies in calendar year 2015 was \$684,063. An additional \$5,000 of Emergency Response funds were paid out to NB CERT.

CAMPAIGN – 2014

For campaign 2014, the board set the campaign goal at \$900,000. As a result of the hard work by Campaign Chair, Mark Leita and the Board of Directors, the 2014 campaign raised \$909,612.24.

The End of Year Celebration took place on Thursday, May 21, 2015 at Seekatz where the top 20 business donors were honored along with Wurstfest and Gruene Music & Wine Fest for their support. A newspaper ad was taken out thanking UWCC donors for their generosity.

The Annual Meeting took place in conjunction with the UWCC monthly Board of Directors Meeting on Wednesday, June 3, 2015 at the New Braunfels Chamber of Commerce, Honor's Hall from 8:15am to 9:00am. This meeting was identified on the UWCC Website, in the New Braunfels Herald-Zeitung, and KNBT Radio.

CAMPAIGN – 2015

For campaign 2015, the board decided to increase the campaign goal to \$925,000. Campaign Chair, James Cohn, chose to stay with the campaign theme titled "Give Where You Live" and promoting the towns/cities within the county.

Special events were effective in this campaign. The 29th annual Gruene Music and Wine Fest had great weather for a weekend of music, wine, food, and fun and resulted in an all time high gift of \$159,153.65 from the event. The Wurstfest Association continued our long standing partnership to have a United Way Night on the Monday night of Wurstfest. Our PILLARS Club party included Company Campaign Coordinators, sponsors, and special guests. We had an outstanding year receiving \$19,680 from Wurstfest!

In this campaign, we again encouraged companies to conduct educational meetings with their employees to inform them of the United Way agencies, what services are provided, and how they can help others in the community through a gift to United Way. Several companies conducted employee campaigns for the first time and others achieved impressive gains in pledges from their employees. New Braunfels Utilities

raised pledges totaling over \$41,508.52 and Tri-City Distributors made a gift of \$25,000. Two other organizations that should be commended are the three HEB stores in Comal County and Harland Clarke/Checks in the Mail. We are all thrilled with the opening of a 4th HEB in 2016. UWCC Board members working in San Antonio focused on reminding their co-workers to direct funds to Comal County. Once again, the year ended waiting for results from the national campaigns and the United Way of San Antonio.

We know the agencies appreciated the time and effort to complete the projects and support our community. We thank the companies for giving their employees the time to volunteer. We hope to expand the Day of Caring to more companies and more agencies next year.

COMAL COMMUNITY NEEDS ASSESSMENT

The purpose of the Assessment was to help public and private organizations in Comal County identify community assets, emerging challenges and opportunities, and find solutions to any existing health and human service problems. Continued work in 2015 included a focus on healthy living initiatives, homeless counts, substance abuse, and enhancing relationships with those entities throughout the county focused on solving Youth and Seniors issues and data tracking with the University of Texas, School of Public Health.

In November, 2014, CI:NOW published an update to the data on the 2008 Assessment and included data on Guadalupe County. This report was funded by the City of New Braunfels, Christus Santa Rosa – New Braunfels, McKenna Foundation, New Braunfels Area Foundation, Resolute Health, United Way of Comal County and the United Way of Guadalupe County. This report will be valuable to our partner agencies as they move forward in program development.

UNITED WAY BUDGET

The 2015 board approved an Operating and Campaign Budget of \$189,138.28 with an additional \$5,000 held for Emergency Response needs. Final actual operating and campaign expenses in 2015 totaled \$187,012.99. And the \$5,000 Emergency Response budget was granted to New Braunfels Community Emergency Response Team to secure communication equipment to meet search and rescue needs.

The board approved a 2016 Operating and Campaign Budget of \$206,328.40 with an additional \$5,000 held for Emergency Response needs. This does include affiliation fees to the United Way of America and United Ways of Texas and the transition to a new online grant application tool.

Our Administrative and Fundraising overhead percentage is 13.8 percent (2014 IRS Form 990). This is a increase from the previous year due to the decrease in revenue from previous campaigns.

RECOGNITION

United Way does not exist without the work and dedication of many volunteers. Each year many are acknowledged during the End of Campaign Celebration. Two Board Member's term ended in 2015: James Betterworth and Renee Couch. There was one Board member who was unable to continue his service: Shane Mullenix. Shane brought many positive changes to the work of 6 UWCC and he will be greatly missed. In 2015 we added 2 board members: Jennifer Dillingham and Dr. Jim Antenen.

Special thanks were extended to Dee Goss who received the 2014 Volunteer of the Year posthumously for her dedication and hard work in establishing Family Promise.

We also want to recognize the United Way partner agencies who work each day to make a difference in the lives of the people in Comal County. The staff and volunteers are commended for their dedication and commitment to making life better in Comal County.

Finally, we thank the many donors who give so generously through the United Way campaign. With the commitment of many businesses and organizations in Comal County, thousands of individual donors have the opportunity to give to their fellow man and enable the agencies to conduct the programs that make such a difference. Additionally, we would like to thank the many retired individuals who give so generously to those in need in our community.

2015 Board of Directors

OFFICERS

Alice Hernandez (2/3/2010)	NB Chamber of Commerce	President
Renee Couch (12/3/2008)	Comal County Treasurer	IPP
Gwen Pittman (5/4/2011)	HEB	President Elect
Veronica Payne (10/3/2012)	Frost Bank	Treasurer
James Cohn (11/7/2012)	Burch Law Firm	Campaign Chair
Mike Dussere (10/3/2012)	WORD	Allocations Chair
Gay Helmly (12/11/2012)	Christa Santa Rosa – NB	Compliance Chair

OTHER BOARD MEMBERS

Kristi Aday (10/1/2014)	City of New Braunfels
Dr. Jim Antenen (10/7/2015)	Wayland Baptist University
James Bettersworth (10/7/2009)	Bettersworth Law Firm
Jennifer Dillingham (2/4/2015)	New Braunfels Law
Jamie Ezell (9/4/2013)	Comal ISD
Gary Finley	Wal-Mart Distribution
Dani Fuselier (2/6/2013)	Broadway Bank
Liz Kaminski	NB ISD
Paul Kraft (5/1/2013)	Broadway Bank
Mark Leita (5/2/2012)	MBL Public Strategies
Sherry Mosier (9/3/2014)	BSB Econ Dev Foundation
Shane Mullenix (11/7/2012)	Hunter Cement/TXI
Sandy Nolte (6/5/2013)	New Braunfels City Council
Tillman Roots (12/10/2013)	Comal County
Robert Sanders (8/6/2014)	CenterPoint Energy
Chris Snider (9/4/2013)	Texas Tito's
Scott Smajstrla (10/1/2014)	NuStar Energy
Kim Springfield (5/7/2014)	Keller Williams Realty
Darin R. Talley (3/3/2010)	NuStar Energy LP
Gregory Thomas (12/10/2013)	New Braunfels Utilities
Joyce Yannuzzi (10/1/2014)	Independent

STAFF

Terry Robinson	Executive Director
Beverly Hilbert	Administrative Assistant
Ginny Charlton	Bookkeeper

LIST OF AGENCIES AND ALLOCATIONS IN 2015

Acacia Medical Mission	\$36,500
Any Baby Can	\$14,500
Big Brothers, Big Sisters	\$8,000
Boy Scouts	\$10,500
Bulverde Food Pantry	\$18,250
Bulverde Senior Center	\$13,000
CASA	\$23,500
CentroMed	\$9,000
Children's Advocacy Center of Comal County	\$38,000
Comal County Child Welfare Board	\$17,000
Comal County Senior Citizen's Foundation	\$37,000
Communities in Schools of South Central Texas	\$65,000
Community Resource and Recreation Center of Canyon Lake	\$60,500
Connections Individual and Family Services	\$39,000
Crisis Center of Comal County	\$52,250
Family Life Center	\$12,500
Family Promise of Greater NB	\$14,000
Friends of Christus Foundation	\$18,000
Girl Scouts of Southwest Texas	\$8,250
Hope Hospice	\$3,000
NB Christian Ministries	\$25,000
NB Family YMCA	\$7,500
RSVP	\$7,000
River City Advocacy	\$23,500
Salvation Army	\$4,511
San Antonio Food Bank	\$62,250
SART	\$2,302
SOS Food Bank	\$32,500
Wunderbar	\$22,750
Total Calendar Year Allocations.....	\$684,063