



**2016  
ANNUAL REPORT**



## OVERVIEW

In 2016 the United Way of Comal County saw a community that stepped up to provide support in a time of substantial growth, the closure to the 2015-2016 Allocation cycle, and the beginning of the 2016-2017 Allocation cycle. During the last half of the year, the UWCC funded 29 various agencies throughout Comal County.

The state of the economy continued to have an impact on both fundraising and requests for funds. Nonetheless, donations from our residents who live within Comal County but commute to San Antonio for employment grew as did support from various national accounts and individual donors. The 2015 campaign raised \$991,712 exceeding the campaign goal of \$925,000 and the 2016 campaign goal was set at \$1,000,000.

Day after day, our agencies provided a range of services including early childhood intervention, youth services, shelters, family crisis assistance, and senior citizen activities. The UWCC Board of Directors and community volunteers approved grant awards totaling \$702,500 for the July, 2016 thru June, 2017 cycle.

## UNITED WAY WORLDWIDE

United Way Worldwide (UWW) provides concrete guidance for all local United Ways operations and direction on how to be a more effective community impact leader. Their standards are intended to be aspirational and to answer the question, "What does excellence look like?"

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 addition to Standards, UWW launched the Business Performance Matrix that organizes United Ways based on their community profile. The profile incorporates factors such as corporate presence, population size, staff size and performance, providing our United Way with specific areas for continued improvement:

- 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 Worldwide. Our audit for the year ended December 31, 2016, 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 the 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 Executive 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.). Each employee brings a high level of professionalism to the United Way of Comal County.

## **AFFILIATION AND ALLOCATION**

During the affiliation and allocation process, we targeted critical programs helping the residents of Comal County. If approved for funding, each agency is required to submit quarterly financial reports and program status reports.

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. 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 2016, UWCC closed out its July, 2015 thru June, 2016 funding cycle by providing \$328,369 in funding for 28 agencies.

During the second 6 month period of 2016, UWCC began its July, 2016 thru June, 2017 funding cycle by providing \$355,281.71 in funding to 29 agencies. This leaves a remaining balance of \$347,218.29 to be distributed the first half of calendar year 2017.

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. Agencies of note include SART moving under Sow Healthy Coalition, St. Judes Ranch for Children returning, and Wunderbar not returning.



Total dollars awarded to United Way of Comal County partner agencies in calendar year 2016 was \$683,650.71.

### **CAMPAIGN – 2015**

For campaign 2015, the board set the campaign goal at \$925,000. As a result of the hard work by Campaign Chair, Chris Snider and the Board of Directors, the 2015 campaign raised \$991,712.

The End of Year Celebration took place on Tuesday, May 17, 2016 at Seekatz where the top 20 business donors were honored along with Wurstfest and Gruene Music & Wine Fest for their support.

The Annual Meeting took place in conjunction with the UWCC monthly Board of Directors Meeting on Wednesday, June 1, 2016 at the New Braunfels Chamber of Commerce, Honor's Hall from 8:15am to 9:00am. This meeting was identified in the New Braunfels Herald-Zeitung, and KNBT Radio.

### **CAMPAIGN – 2016**

For campaign 2016, the board decided to increase the campaign goal to \$1,000,000. Campaign Chair, Chris Snider, chose to stay with the campaign theme titled "Comal Helping Comal" and promoting the towns/cities within the county. Final results from this campaign will not be known until later in 2017.

Special events were effective in this campaign. The 30th 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 \$142,543.29 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 \$15,600 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 \$51,750.72 and Tri-City Distributors made a gift of \$30,000. Two other organizations that should be commended are the four HEB stores in Comal County and Harland Clarke/Checks in the Mail. 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 2016 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 2016 board approved an Operating and Campaign Budget of \$206,328.40 with an additional \$5,000 held for Emergency Response needs. Final actual operating and campaign expenses in 2016 totaled \$205,675.74. And the \$5,000 Emergency Response budget was not utilized. Expenditures this year included a new tracking and management system for Allocation Applications, E-CImpact and contracting with The AMMO Group to manage all UWCC marketing, website, and social media.

The board approved a 2017 Operating and Campaign Budget of \$212,022.56 with an additional \$5,000 held for Emergency Response needs. This does include affiliation fees to United Way of Worldwide and United Ways of Texas.

Our Administrative and Fundraising overhead percentage is 14% (2015 IRS Form 990). This is a .02% increase from the previous year.



## RECOGNITION

United Way does not exist without the work and dedication of its many volunteers. These individuals are acknowledged during the End of Campaign Celebration held in May. Two Board Member's term ended: Alice Hernandez and Darin Talley. Three Board Members were unable to continue their service: Gary Finley, Kim Springfield, and Scott Smajstrla. All were tremendous assets to UWCC and will be greatly missed. Five Board Members were added: Rene Garcia CPA, Michelle Miller of NuStar Energy, Alex Hayman of OPTUMCare, Bobbie Koepp of Comal County, and the return of Donna Eccleston Comal County Commissioner

Special thanks were extended to Jeff Heinke who received the 2015 Volunteer of the Year Award for his many years of overseeing all graphic art for our United Way.

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.



## 2016 BOARD OF DIRECTORS

### OFFICERS

Gwen Pittman (5/4/2011)	HEB	President
Alice Hernandez (2/3/2010)	NB Chamber of Commerce	IPP
James Cohn (11/7/2012)	Burch Law Firm	President Elect
Veronica Payne (10/3/2012)	Frost Bank	Treasurer
Chris Snider (9/4/2013)	Texas Tito's, Inc	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
Donna Eccleston (6/1/2016)	Comal County
Jamie Ezell (9/4/2013)	Comal ISD
Dani Fuselier (2/6/2013)	Broadway Bank
Rene Garcia (5/4/2016)	Akin, Doherty, Klein & Fuege
Alex Hayman (5/4/2016)	OPTUMCare
Liz Kaminski	NB ISD
Bobbie Koepf (5/4/2016)	Comal County
Paul Kraft (5/1/2013)	Broadway Bank
Mark Leita (5/2/2012)	Firstmark Credit Union
Michelle Miller (5/4/2016)	NuStar Energy
Sherry Mosier (9/3/2014)	BSB Econ Dev Foundation
Sandy Nolte (6/5/2013)	Nolte Villa Property Management
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 2016

Acacia Medical Mission	\$36,500
Any Baby Can	\$15,500
Big Brothers, Big Sisters	\$10,000
Boy Scouts	\$13,000
Bulverde Food Pantry	\$18,750
Bulverde Senior Center	\$15,500
CASA	\$30,000
Children's Advocacy Center of Comal County	\$35,500
Comal County Child Welfare Board	\$22,500
Comal County Senior Citizen's Foundation	\$28,500
Communities in Schools of South Central Texas	\$60,000
Community Resource and Recreation Center of Canyon Lake	\$45,000
Connections Individual and Family Services	\$35,500
Crisis Center of Comal County	\$61,500
Family Life Center	\$17,500
Family Promise of Greater NB	\$17,500
Friends of Christus Foundation	\$20,500
Girl Scouts of Southwest Texas	\$2,500
Hope Hospice	\$6,750
NB Christian Ministries	\$24,500
NB Family YMCA	\$10,500
RSVP	\$7,000
River City Advocacy	\$33,500
Salvation Army	\$11,489
San Antonio Food Bank	\$58,750
SART	\$10,698
SOS Food Bank	\$26,250
Sow Healthy Coalition	\$6,963.71
St. Jude's Ranch for Children	\$1,500
Total Calendar Year Allocations.....	\$683,650.71