

2018 COMMUNITY IMPACT REPORT

UNITED WAY OF BUFFALO & ERIE COUNTY

United
Way



SEE THE DIFFERENCE YOU'VE

CAMPAIGN HIGHLIGHTS

- The annual campaign grew for the 8th consecutive year totaling \$16,558,280.
- The Endowment grew by another \$3 million bringing the current portfolio to \$15 million when including expectancies.
- New business cultivation resulted in 51 new accounts raising \$56,692.
- M&T Bank and Wegmans both raised over \$1 million in their 2017 campaign.
- Saw increased revenues in grant management with an increase of \$1.3 million from last year.

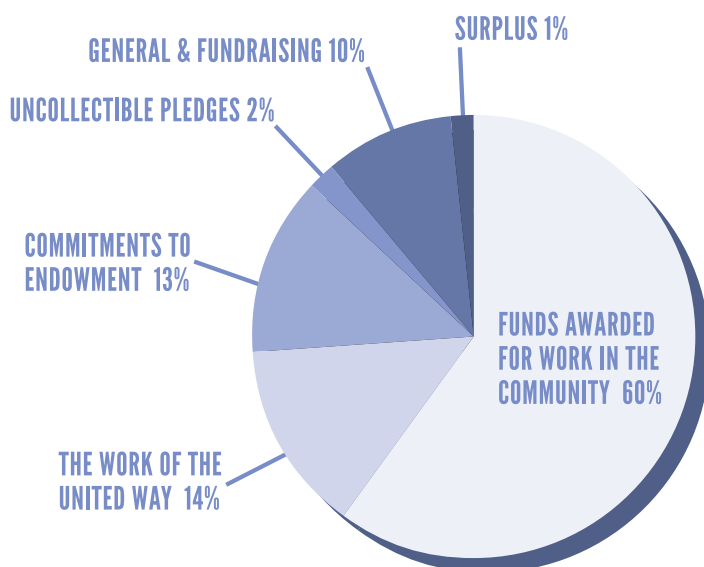
Total revenue for fiscal year 2018
was \$23,285,760 derived from:

\$16,558,280
campaign revenue

\$5,935,640
grant funding

\$791,840
investment income

WHERE THE MONEY GOES



MADE

United Way brings people, organizations, and resources together to improve community well-being. But we are more than fundraisers. We surround our community's most critical problems—and we fight.

ORGANIZATIONAL HIGHLIGHTS

- Launched our fourth Community Report Card “A Profile of Premature Birth in Erie County” which highlights the health risks premature babies are more likely to experience.
- Participated in successful advocacy to include \$1.25 million in funding in the 2018–2019 NYS budget for 2-1-1; increase funding for child care subsidies by \$7 million in the 2018–2019 NYS budget; and extend funding for the Child Health Insurance Program (CHIP) for 10 years.
- Launched Labor United, a partnership between AFL-CIO Community Services and United Way.

"As community leaders we can shape the future of our community by helping United Way address the most critical needs. I've seen the positive impact of our leaders and I am proud to put our collective strength and energy into supporting United Way's mission." —Paulette Crooke, 2017 Campaign Chair



FACT LAST YEAR OVER 30 COMPANIES PROVIDED 1,022 VOLUNTEERS TO COMPLETE 272 PROJECTS THROUGH OUR BUSINESS MEETS COMMUNITY PROGRAM.



Full Service Community Schools

Our Full Service Community School initiative has increased community engagement in the South Buffalo community by 500%. A total of 1,575 students, 1,644 family members, and 1,115 community members were served for a total of 4,334 individuals during the 2016-2017 school year. 73% of the students participating displayed increased pro-social skills, coping methods, and knowledge.

EDUCATION

United we help students be all they can be.

Funding in Education

\$1.9 million in United Way funded programs

\$2.3 million in grants managed by United Way

Total Funding in Education

\$4.2 million invested back into our community for education programs & initiatives

Recent Successes

- Built two Born Learning Trails within Erie County to promote healthy early childhood development with plans for two more in 2019.
- **Awarded a \$1.4 million grant from the Ralph C. Wilson Jr. Foundation to support and expand the highly successful WNY Girls In Sports program.**

YOU HELP CHILDREN REACH THEIR FULL POTENTIAL.

- **7,979** children achieved developmentally appropriate social-emotional and behavioral skills.



- **6,960** students were enrolled in high-quality childcare, after-school or out-of-school programs.

- **4,490** children demonstrated age appropriate literacy and mathematical skills.



*results from United Way funded programs

FACT **32,394** YOUNG CHILDREN & STUDENTS WERE EQUIPPED TO SUCCEED IN SCHOOL.

HEALTH

United we build strong and healthy communities.

Funding in Health

\$875,000 in United Way funded programs

\$2.7 million in grants managed by United Way

Total Funding in Health

\$3.5 million invested back into our community for health programs & initiatives

Recent Successes

- Awarded a \$1.1 million Community Food Systems grant from General Mills to increase access and affordability of fresh and culturally appropriate food. This resulted in 13 agencies receiving one time grants to fulfill this vision in the community.

COMMUNITY BABY SHOWER

Over **75 companies and community organizations held baby showers** to benefit United Way's Community Baby Shower which donates essential items to expectant mothers in need. Essential items include diapers, wipes, digital thermometers, board books, and sleep sacks.

Community Baby Shower Sponsors:

Title:



JOHN R. OISHEI

Children's Hospital

Premier:



Media:



Play 60 Challenge

The Play 60 Challenge program encourages children to get 60 minutes of physical activity each day and make healthy eating choices. In 2017, 62 schools participated, reaching over 10,000 students for a grand total of 16,342,459 minutes of activity.

YOU HELP PEOPLE IMPROVE THEIR WELL-BEING.

- **9,574** community members were assisted to address a social condition that was negatively impacting their health.



-
- **7,486** children participated in CATCH schools where children performed better physically and ate healthier foods.



-
- **2,957** individuals attended necessary health-related appointments.



*results from United Way funded programs





United Way Free Tax Prep

Tax season highlights included 8,125 VITA returns filed through the Creating Assets Savings and Hope (CASH) Coalition; 2,223 returns filed on Myfreetaxes.com; and \$16.7 million in total refunds achieved. In addition, 2,880 tax filers were connected to Earned Income Tax Credits earning \$5.8 million and over \$2 million was estimated in total savings associated with tax fees.

FINANCIAL STABILITY

United we help families achieve financial independence.

Funding in Financial Stability

\$1.4 million in United Way funded programs

\$1.8 million in grants managed by United Way

Total Funding in Financial Stability

\$3.2 million invested back into our community for financial stability programs & initiatives

Recent Successes

- The American Apprenticeship Initiative reached its grant goal of 300 employer-forecasted apprentices for the five year grant period and began a waiting list for additional companies to participate in the program.



*The AAI of WNY is funded by a \$2.9 million grant awarded to the United Way of Buffalo and Erie County by the US Department of Labor, Employment and Training Administration. The content of this publication does not necessarily reflect the views or policies of the US Department of Labor.

YOU HELP PEOPLE BUILD SKILLS TO ACHIEVE LONG-TERM STABILITY.

- **6,769** individuals developed a plan to address a financial crisis.



- **1,343** community members completed a training program to improve their likelihood of obtaining and maintaining employment.

- **7,318** individuals were provided with financial education and asset-building services.

*results from United Way funded programs

FACT **24,112** PEOPLE RECEIVED TOOLS TO IMPROVE THEIR FINANCES & BECOME MORE SELF-SUFFICIENT.

WE PROMOTE COMMUNITY

LEADERSHIP SOCIETY

Leadership Society's 4,500-plus members contributed a total of \$6.1 million last year and used their experience and expertise to help improve life for people in our community.

FAMILY VOLUNTEER DAY

On September 29, 2018, 232 volunteers, including 68 children, from 63 families **packed 40,000 meals** that were then donated to the Food Bank of WNY.

Family Volunteer Day Sponsors:



Leadership Society Sponsors:



NEXT GENERATION UNITED

Next Generation United is a diverse group of young professionals who partner with United Way to change lives and build a better community.

PITCH 10

On September 20, 2018, over 200 young professionals listened to 10 local nonprofits **pitch their mission to win \$10,000 in grants**. They voted and awarded Grassroots Gardens the top prize of \$5,000.

Next Generation United Sponsors:

Silver:



Bronze:



ENGAGEMENT

WOMEN UNITED

Women United is a community of women invested in changing the odds for individuals and families in Buffalo and Erie County. Women United members inspire, educate, and motivate others through philanthropy, leadership, and volunteerism.

100 WOMEN WHO CARE

On July 12, 2018, over 100 women gathered at the Garrett Club for the 6th annual 100 Women Who Care. After hearing from three organizations, Compass House walked away with a **\$10,000 grant from Women United.**

Women United Sponsors:



MARY ANN COULSON
& KATHERINE
MOHNEY



M&T Bank

VOLUNTEER

You answer the call for help. You roll up your sleeves and pitch in where needed. You lock arms with others to make our community better. United Way connects people and businesses to volunteering that helps strengthen our community.

26TH DAY OF CARING OVER **3,000** VOLUNTEERS FROM **110** ORGANIZATIONS COMPLETED **173** PROJECTS @ **125** LOCAL AGENCIES

Day of Caring Sponsors:



GEICO

nationalgrid
HERE WITH YOU. HERE FOR YOU.



ENDOWMENT & PLANNED GIVING

*"I'm leaving...a footprint,
a thumbprint, a legacy."*

For an entire century, the United Way of Buffalo & Erie County has worked to enhance the health, financial stability, and education of every person in our community. In honor of our 100th anniversary, we created a one-time opportunity for donors of \$100,000 or more to join our Century Circle and be recognized as a Founding Member.

On May 22, 2018, we invited those who contributed to our endowment and special guests to join us as we unveiled new recognition walls to celebrate the generosity of our community.

Thank you to the many companies and individuals who believe in our mission and invested in our endowment to ensure our success for the next 100 years.

MILLION DOLLAR ROUNDTABLE

Peggy Pierce Elfvin

Patricia H. and Richard E. Garman

Ralph C. Wilson Jr. Foundation

TOCQUEVILLE LEGACY CIRCLE

Michael T. Cervi

Paulette M. Crooke and Michael Toner

William and Patricia Frederick

Brian D. Gwitt and Bridget E. Niland

Dave and Shari Hore

Brian and Deborah Lipke

Luis and Jessica Rodriguez

Ted and Ginna Walsh

Gina and Michael Weiner

Ralph and Mary Wilson

Margaret and Bob Zak

CENTURY CIRCLE

Buffalo Bills Foundation

Buffalo Sabres Foundation

Pegula Sports and Entertainment

EJ and Karen Butler

Shawn and Amy Connolly

Mary Ellen Eagan

Eastman Machine Company and
Stevenson Family

First Niagara Foundation

Hunt Charitable Foundation

John J. and Maureen O. Hurley

Independent Health

Lawley Family Gift

M&T Bank

Mader Construction Company, Inc.

Margaret M. Martin

Barbara Mierzwa

PCB Piezotronics, Inc. An MTS Company

Paul C. Reger

Wegmans

Special thanks to those who helped
SECURE OUR LEGACY



FACT 6,200 PEOPLE VOLUNTEERED 53,900 HOURS WITH A VALUE OF \$1.3 MILLION. 12

TOCQUEVILLE SOCIETY

The Tocqueville Society is named after the 19th-century French nobleman who admired America's unique spirit of volunteerism to assist people in need. Members provide philanthropic leadership by setting the standard in their giving and in their commitment to leading positive change.

\$1,000,000 +

Mr. and Mrs. Jeremy M. Jacobs Sr.

\$100,000–\$999,999

Sebastian, Awner, Houlding, O'Brien Group at Merrill Lynch The Margaret L. Wendt Foundation
Mr. Chris and Mrs. Kimberly Sebastian
Mrs. Maxine and Dr. Steven Awner
Mr. Austin Houlding and Ms. Michelle Daubert
Mr. James and Mrs. Patricia O'Brien

\$50,000–\$99,999

James H. Cummings Foundation
William and Patricia Frederick
1 member wishes to remain anonymous

\$25,000–\$49,000

Charles E. Balbach, Melissa Balbach and John
Bace, Jennifer and Teo Balbach
Walter and Connie Constantine
Jesse Doren and Emily Constantine Doren
Pete Grum

Evan and Connie Harper
Stanford and Judith Lipsey Foundation
Lumsden & McCormick, LLP
The Noble Family Charitable Foundation
Donald I. MacDavid

Rajat and Jenny Shah
Mr. and Mrs. Robert G. Wilmers
3 members wish to remain anonymous

\$15,000–\$24,999

The Cameron and Jane Baird Foundation
Joan and David Bruce
Bill and Jody Dowdall
Robert J. and Martha B. Fierle Foundation
Bodil and George Gellman
Josephine Goodyear Foundation
Dave and Shari Hore
Peter and Mary Jo Hunt

Alice and Jeremy Jacobs Jr.
Mr. and Mrs. Christopher Koch, New Era Cap
Lawley Insurance
Carolyn and Bob Montgomery
Michael and Holly Constantine Ortman
Mr. and Mrs. Robert E. Sadler Jr.
Mr. and Mrs. Robert L. Stevenson
Tim and Colleen Tevens

Jim and Michal Wadsworth
Ted and Ginna Walsh
Eileen & Rupert Warren Charitable Fund
Gina and Michael Weiner
Margaret and Bob Zak
Barbara J. Morgan and Charles F. Zukoski
1 member wishes to remain anonymous

\$10,000–\$14,999

Rick and Sylvia Abramson
Mr. Frederick Attea
Joseph H. and Diane J. Bell, Moog Inc.
Bennett Family
Jim and Rosemary Biddle
Ann and Bob Brady
EJ and Karen Butler
Kenneth and Karen Christie
Paul and Victoria Comeau
Shawn and Amy Connolly
Mr. and Mrs. W. Edwin Constantine III
Paulette M. Crooke and Michael Toner
Frank and Robin Curci
James and Alison Derrick
James and Karen Dusel
Robert A. and Elizabeth S. Evans
Drs. Eli Farhi and Emily S. Friedan
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Robert and Lisa Feldman
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Dr. and Mrs. Kevin J. Gibbons
Mr. and Mrs. Robert D. Gioia

Gene and Kathy Gramza
Peter Grogan and Christye Peterson,
United Capital Financial Life Management
Gordon and Gretchen Gross
Mr. and Mrs. James Houser
Louis and Joan Jacobs
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Brian and Deborah Lipke
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Jock and Betsy Mitchell
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Charles Moran
Laura and Mark Morelli
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Carol and Reg Newman
James and Victoria Newman
Michael and Marcy Newman

Sanford and Margery Nobel
Frank and Theresa Papa
Ronald J. and Diana M. Papa
Richard and Karen Penfold
Frederick and Lisa Pierce
Mr. and Mrs. William J. Regan Jr.
Mr. and Mrs. Timothy J. Shedler
Mrs. Kenneth L. Slawson
Maureen and Paul Sweeney
Maria Testa and Thomas Petrocelli
Joseph S. and Mary Ann Testa Philanthropic Fund
Robert P. Thill and Elizabeth A. Moll
Linda and Mario Urso
Alan and Phyllis Vogt
John N. Walsh III
Robert and Aileen Walter
Heather and Jon M. Williams,
The OSC Charitable Foundation
Dr. Gil Wolfe
Howard and Leslie Zemsky
2 members wish to remain anonymous

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Ingram Micro

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Communications Workers of America

Frank Hotchkiss

United Steelworkers, District 4

Austin Houlding

Merrill Lynch

Donald Ingalls

BlueCross BlueShield of WNY

Marijke Kemble

Community Volunteer

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KeyBank

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Luis Rodriguez

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Hunt Real Estate

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Michael Keating

Wegmans

Paulette Crooke

Community Volunteer

LuAnne Kingston

HSBC Bank USA

Rich McCarthy

M&T Bank

Eileen Morgan

Delaware North Companies

Hon. E. Jeannette Ogden

Buffalo City Court

Keith Stolzenburg

Community Volunteer

Jim Tilley

Community Volunteer

John Walsh III

Walsh Duffield Companies Inc.

Dr. A. Scott Weber

University at Buffalo

Robert Zak

Merchants Insurance Group



We bring people, organizations, and resources together to improve community well-being.



Every person in our community has the opportunity to enjoy the highest possible quality of life.

PRESIDENT & CEO

"As we have for a century, the United Way will continue to fight to improve the lives of residents in Buffalo & Erie County. We are proud of the work of the United Way and are humbled by the incredible support from so many. Our intention is to continue to make a difference—for the next 100 years." —Michael Weiner



FINANCIAL REPORT

BALANCE SHEET

MARCH 31, 2018

ASSETS

| | |
|---|---------------------|
| Cash and cash equivalents | \$2,287,381 |
| Investments | 4,072,026 |
| Endowment Investments | 11,150,904 |
| Annual campaign pledges receivable, net | 7,436,962 |
| Other assets | 3,734,613 |
| Property and equipment, net | 2,237,206 |
| TOTAL ASSETS | \$30,919,092 |

LIABILITIES AND NET ASSETS

LIABILITIES

| | |
|---------------------------------------|--------------------|
| Designations payable | \$3,357,933 |
| Allocations payable | 2,247,766 |
| Accounts payable and accrued expenses | 1,072,943 |
| Other Liabilities | 1,862,350 |
| TOTAL LIABILITIES | \$8,540,992 |

| | |
|---|---------------------|
| NET ASSETS | \$22,378,100 |
| TOTAL LIABILITIES AND NET ASSETS | \$30,919,092 |

Statement of Activities—Operating Activity—Year Ended March 31, 2018

REVENUE, GAINS AND OTHER SUPPORT

CAMPAIGN RESULTS

| | |
|---------------------------------------|---------------------|
| Current year campaign results | \$13,533,638 |
| Endowment Campaign | 3,024,642 |
| Total Campaign | 16,558,280 |
| Less: donor designations | (4,394,893) |
| Less: estimated uncollectible pledges | (450,000) |
| Net campaign results | \$11,713,387 |

OTHER REVENUE

| | |
|----------------------------|--------------------|
| Grant & other revenue | \$5,935,640 |
| Investment income | 791,840 |
| Total other revenue | \$6,727,480 |
| TOTAL REVENUE | 18,440,867 |

EXPENSES

COMMUNITY INVESTMENTS

| | |
|--|-------------------|
| Gross funds awarded to agencies | 12,511,151 |
| Other programs and program support services | 3,300,746 |
| Total program services including designations | 15,811,897 |
| Donor designations | (4,394,893) |
| Total program services, Net | 11,417,004 |

SUPPORTING SERVICES

| | |
|----------------------------------|-------------------|
| Management and general | 451,761 |
| Fund raising | 1,759,729 |
| Total supporting services | 2,211,490 |
| TOTAL EXPENSES | 13,628,494 |

| | |
|--|---------------------|
| Increase in net assets from operations | \$4,812,373 |
| Pension plan SFAS 158 adjustment to Net Assets | 151,193 |
| NET ASSETS—BEGINNING | \$17,414,534 |
| NET ASSETS—ENDING | \$22,378,100 |

**United Way
of Buffalo & Erie County**

742 Delaware Avenue
Buffalo, New York 14209
www.uwbec.org

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