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

- General & Fundraising 10%
- Uncollectible Pledges 2%
- Commitments to Endowment 13%
- The Work of the United Way 14%
- Funds Awarded for Work in the Community 60%
- Surplus 1%

FACT: Over 75 people from 20 different organizations loaned executive training.
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
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
**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.

**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.**
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.

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.
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:

100 WOMEN WHO CARE

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.

Volunteer Sponsors:
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 Gina 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 Mierzwia
- PCB Piezotronics, Inc. An MTS Company
- Paul C. Reger
- Wegmans

**Fact:** Our endowment grew by $3 million bringing the current portfolio to $15 million.
FACT
6,200 peoples
volunteered 53,900 hours with a value of $1.3 million.
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, Aubner, Houlding, O’Brien Group at Merrill Lynch
- The Margaret L. Wendt Foundation
- Mr. Chris and Mrs. Kimberly Sebastian
- Mrs. Maxine and Dr. Steven Aubner
- 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

### $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 Lipsay Foundation
- Lumden & 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 Ortmann
- 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. Croke 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
- Chris and Jennifer Feehey, Delaware North
- Robert and Lisa Feldman
- Dr. Joseph A. Gardella Jr. and Ms. Carol A. Kizis
- 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
- William and Anne Joyce
- Kenneth R. and Linda A. Kahn
- Adair and Kevin Kearney, Hodgson Russ LLP
- Mrs. Bernard J. Kennedy
- Mr. Ross B. Kenzie
- Brian and Deborah Lipke
- The Marks Family Foundation
- Jay and Mary McWatters
- Jock and Betsy Mitchell
- Carol and Carl Montante
- Charles Moran
- Laura and Mark Morelli
- Mr. Stephen J. Muscato and Ms. Theresa J. Muscato
- 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 Sweeny
- Maria Testa and Thomas Petrocelli
- Joseph S. and Mary Ann Testa Philanthropic Fund
- Robert P. Thill and Elizabeth A. Moll
- Linda and Mario Uso
- 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
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
## 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

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## 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: 3,306,746

#### Total program services including designations: $15,817,897

#### Donor designations: (4,394,893)

#### Total program services, Net: $11,423,004

#### 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

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United Way of Buffalo & Erie County
742 Delaware Avenue
Buffalo, New York 14209
www.uwbec.org