

United Way of Southwest Colorado



2015 Annual Report

Prepared February 2016

2015 was a year full of new initiatives for United Way of Southwest Colorado. The annual fundraising drive, which ended in June 2015, generated \$643,000 which was lower than we have aimed. Again, some of our long-time workplace partners suffered business challenges that contributed to our decreased fundraising for this year. United Way moved toward becoming a Community Impact organization in a larger way, with increasingly strategic funding, allowing it to make an even bigger impact on our community's problems.

About United Way

United Way's history of service to residents of Southwest Colorado began in 1972. Over the past 44 years, United Way has helped tens of thousands of local citizens who were in need through the work of our Community Partner Agencies. United Way continues to coordinate our partner agencies towards community level change goals in Education, Self-Reliance and Health. Today, United Way serves the five counties of Southwest Colorado – Archuleta, Dolores, La Plata, Montezuma and San Juan Counties. Donations made to United Way stay in the county/region in which they were made from so that donors are supporting efforts and causes in their own community. Over the past decade, United Way has generated over \$7 million for Southwest Colorado.

2014-2015 Campaign

The region-wide goal for the 2014 campaign was \$724,000. In June 2015, United Way announced raising \$643,000. While we were short of our goal, we still raised a significant amount during a time of change.

The annual fundraising drive total was achieved through a combination of employee giving via payroll deduction, corporate gifts, one-time gifts from individuals, and special events. Approximately 200 businesses either allowed employees to contribute via payroll deduction, or made a corporate gift, or both. Approximately 250 individuals (outside of a specific workplace) made a donation to the campaign. Finally, 11 separate fundraising events were held with numerous supporters, both businesses and individuals. While United Way does not release the names of individual donors, we can provide detailed information on the business supporters of our campaign and of our events. Call the home office in Durango at 970-247-9444 to learn more.

Sixty-five percent of United Way's 2014-15 campaign support came from donation from employees and from corporate gifts that augment employee giving. The rest of the campaign funds came from special events and individual givers who make one-time donations.

2015-2016 Campaign - Underway

Our current fundraising campaign started in July 2014 and is continuing into 2015. Our new goal is set at \$758,000. We expect the make-up of contributors to be substantially similar to the previous campaign. The funds raised from the current campaign will be disbursed throughout 2016 to the partners that were identified in June of 2013 (see “Community Investments 2015” below).

2014-15 Financials and Reporting

United Way operates on a July 1 to June 30 fiscal year. Our most recent audit was completed for FY 2014 – 2015.

United Way continues to operate efficiently. The most recent audit showed an overhead rate of only 18.87% (calculated according to CCC reporting standards from 990 figures). To verify this rate, United Way’s FY 2014-2015 IRS Form 990 and FY 2014-2015 audit are available for inspection by contacting our office at 970-247-9444. These documents can also be downloaded from our website unitedway-swco.org, or from other charity watchdog groups such as www.Guidestar.org.

The total revenue for the organization for this fiscal year was \$1.04 million.

Furthermore, while the costs to the organization for the fiscal year were 18.87% (AFR), United Way’s audit shows who pays for these costs. United Way uses its special event revenue to cover the vast majority of these costs. Total special event revenue was \$147,825.

The costs to core workplace donors then are only 5.7%, meaning 94.3% of our core donor’s gifts were invested back into our community.

United Way’s Finance Director Valorie Peduto, Board Treasurer Randy Hagen and the Finance Committee did a great job keeping expenses down and collections up.

United Way also completes annual reporting requirements to United Way Worldwide. All requirements were met and our membership status was approved by United Way of Worldwide for 2015. United Way also adheres to all state and federal laws that govern nonprofit organizations. To confirm United Way’s status in Colorado, visit www.sos.state.co.us and click on Charity and Fundraiser Search under the Business and Licensing section.

Community Partner Agencies are not charged any fees or dues to receive United Way funding.

The sources of United Way’s annual revenue can all be found in our annual audit. In summary, sources of annual revenue are:

- donations from employees (private business and government)
- corporate gifts
- donations from individuals
- supporters of special events
- interest income

- in-kind donations
- City of Durango Human Service Block Grant
- La Plata County Human Services Allocation Process Management
- Income for several direct financial assistance programs where United Way serves as the fiscal agent

The detail on the uses of the annual revenue can also be found in the audit. In summary, our expenses are as follows:

Administrative expenses

Fundraising expenses

Program expenses

Funding to nonprofit organizations and local causes (more information on this can be found in the 2015 Community Investments section)

2015 Community Investments

Local volunteers in United Way's five-county service area (Montezuma, Dolores, San Juan, La Plata and Archuleta) determined in advance of the 2014-15 fundraising drive where the money that was raised should be invested. Forty nonprofit organizations received partner agency status. In total, 63 programs operated by these 40 partners were recommended for an investment from United Way. Funding was sent to these organizations in 2015 on a quarterly basis as it was collected from the pledges made to the 2014 campaign. Collectively, United Way's community investment volunteers spent hundreds of hours reviewing local nonprofit agencies.

See the attached list for the names of all organizations funded and their funding amounts.

Additionally, the City of Durango has placed its trust in United Way to recommend to it how to best invest the funds it has for health and human services in the best nonprofit organizations serving the City.

2016 Community Investments

The partner organizations and amounts remain in place again for 2016 without changes because we are currently operating on a three-year cycle.

Additionally, the City of Durango has placed its trust in United Way to recommend to it how to best invest the funds it has for health and human services in the best nonprofit organizations serving the City. In late 2015, the City of Durango approved United Way's recommendation to invest a total of \$220,000 for 2015 in a total of 19 local nonprofit programs.

2015 Staff and Volunteers

United Way operated half of the year with 2.5 Full-Time Equivalent staff hours spread among 4 employees. Restructuring occurred during the summer and we currently have 3.0 FTE spread among our 5 county area. Dr. Lynn Urban just completed her third year as the President and CEO for the organization.

United Way's board members for 2015 were as follows:

Jay Wood, Board President (Southwest Healthnet)
Heath Corley, Past-President (Comcast Spotlight)
Lizette Langefels, President-Elect (Animas Surgical Hospital)
Paulette Church, Secretary (Retired Educator)
John Moore, Treasurer (CPA)
Ward Holmes, Ex-officio Member (Four Corners Broadcasting)
Lindsay Nyquist, Ex-officio Member (Fort Lewis College)
Kellie Willis, Partner Agency Representative (The Pinon Project)
Vaughn Morris, Partner Agency Representative (Boys & Girls Club of La Plata County)
Gigi Baty, Member (Southwest School of Banking)
Scott Bloom, Member (Title Durango)
Shawn Candelaria, Member (Four Corners Community Bank)
Laura Lewis-Marchino, Member (Region 9 Economic Development)
Jarrod Nixon, Member (Coldwell Banker Heritage House Realtors)

Additionally, we recruit and coordinate over 200 volunteers for a variety of projects around the region including special events, service projects, and other needs that arise throughout the year.

Other

Our partner agencies are not charged any fees or dues to be a partner agency with United Way of Southwest Colorado. We simply make sure that each partner agency is operating efficiently and effectively by comparing their operations to best practices for leading nonprofit organizations.

At United Way of Southwest Colorado, we work to support our partner agencies in ways other than funding as well. In 2015 we helped to provide training sessions related to outcome leadership, management, and healthcare benefit administration in partnership with other organizations.

United Way continues to coordinate our partner agencies towards community level change goals in Education, Self-Reliance and Health. See our website for a list of our goals in each area.