

***2009***

**ANNUAL REPORT**

**FOR**

**UNITED WAY OF COMAL COUNTY**



**United Way  
of Comal County**

## **OVERVIEW**

In 2009 the United Way of Comal County saw a community provide incredible support in difficult economic times, the closure to the 2008-2009 Allocation cycle, and the beginning of the 2009-2010 Allocation cycle. The UWCC currently funds 26 various agencies throughout Comal County.

The state of the economy had 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 down along with support from various national accounts and individual donors. But support from our local businesses was up allowing the total pledges for the 2008 campaign to reach \$920,955.

While reaching the \$1,000,000 goal was not accomplished, the UWCC board distributed more in 2009 than in any previous calendar year: \$554,082.74.

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 OF EXCELLENCE**

Over the last few years, the United Way system has amended its “Standards of Membership” to become “Standards of Excellence”. These Standards ask local United Ways to think about how we engage our community around a shared vision. The 5 components that make up these Standards include: Community Engagement & Vision; Impact Strategies, Resources & Results; Relationship Building & Brand Management; Organizational Leadership & Governance; and Operations.

A recent survey of these 5 components, taken 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. A copy of the results of this survey is located within the UWCC offices and is available for viewing.

Additional standards required for membership with the United Way of America include standardizing practices, increasing accountability, and providing transparency for all local United Ways. Membership requirements 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, 2009, is being completed by E. Keith Moore, Certified Public Accountant and will be available in our office for anyone to review.

We are proud to be meeting the United Way Standards of Excellence. 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 2009 Membership bar in our office.

## **STAFF**

The United Way of Comal County is staffed with one 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 2009, UWCC funded 24 agencies totaling \$267,771.74. While funding during this timeframe had been approved for more, penalties were applied to 2 agencies which had violated their formal Agreement with UWCC by fundraising during the blackout period. This violation was their second incident and penalties were administered.

In the second six months of 2009, UWCC began its 2009-2010 funding cycle by supporting 26 agencies totaling \$286,311 with an additional \$1,000 held in reserve for the American Red Cross Curriculum Kit. One new agency was welcomed in (New Braunfels Christian Ministries – Volunteers in Medicine) and a previous partner (Upstarts) was welcomed back.

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 2009 was \$554,082.74.

### **CAMPAIGN – 2008**

For campaign 2008, the board set the campaign goal at \$1,000,000. As a result of the hard work by Campaign Chair, Nathan Pence and the Board of Directors, the 2008 campaign was a huge success bringing in pledges totaling over \$920,955. While the goal was not met, all board members were thrilled with this accomplishment as it was achieved in tough economical times.

The End of Year celebration for this campaign was cancelled due to community concerns over recent flu outbreak. A newspaper ad was taken out thanking UWCC donors for their generosity.

### **CAMPAIGN – 2009**

For campaign 2009, the board decided to decrease the campaign goal to \$850,000 in light of the continued difficult economic times experienced throughout the country. Campaign Chair, James Lowe, chose to use a campaign theme titled “Do you know us? It’s our family, It’s your community! Live United.” This year the campaign kicked off with monthly newspaper ads featuring our partner agencies and educating the community on how their donations are spent. Normally, UWCC uses the New Braunfels Chamber mixer, with the Comal County Fair, to update the business community on the progress of the campaign. Unfortunately this event was also cancelled due to public concerns with flu outbreak.

Special events were effective in this campaign. The 23<sup>rd</sup> annual Gruene Music and Wine Fest had great weather for a weekend of music, wine, food, and fun. This event was made even more special as the United Way of Comal County is the only non-profit to benefit from the event. The weekend resulted in a gift of \$63,006.61 from the event. The Wurstfest Association continued our partnership to have a United Way Night on the Monday night of Wurstfest. We helped advertise the night to encourage attendance and received the total gate proceeds for the evening. Additionally, Wurstfest gave us the Spass Haus to use as a reception for our PILLARS Club members, Company Campaign Coordinators, sponsors, and special guests. We had an outstanding year receiving \$9,739 from Wurstfest!

TXI sponsored the 8<sup>th</sup> Annual United Way Golf Tournament at the Canyon Lake Golf Course on October 10<sup>th</sup> and a Bar-B-Q lunch on October 24<sup>th</sup>. Add this to their corporate and employee donations and over \$53,250.70 was raised for United Way!

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. The SCOOTER Store pledged over \$116,000 and New Braunfels Utilities annual pledges reached over \$28,000. Both the HEB's in New Braunfels and Bulverde also increased their pledges totaling over \$66,000 combined. UWCC ended the year again waiting for results from the national campaigns, and our major contribution from residents who live in Comal County but work out of the county.

Day of Caring events were conducted again this year by several of our supporting businesses. Both the Target Store and Checks in the Mail volunteered to help St. Jude's Ranch for Children with various projects around the facility.

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. The Assessment, published in 2008, identified 10 areas of concern for the county.

1. Comprehensive approach to youth risk reduction
2. Integrated planning for health and social services, housing, and transportation related to needs of seniors
3. Affordable home repair and modernization services
4. Thorough county-wide inventory, monitoring and evaluation of housing stock to assure adequate and affordable housing
5. Planning for future transportation needs, including alternative transport modes
6. Mechanism to protect and maintain water quality
7. Youth mentorship and school guidance programs
8. Collaboration with regional data resources to enhance access to data and expertise for local planning and policy determination
9. A coordinated approach to prevention & intervention for family violence & abuse
10. Focus on health needs services especially mental health and alcohol & drug use

Under partnership with the City of New Braunfels, Christus Santa Rosa New Braunfels, and the Carmage and Martha Ann Walls Foundation, the UWCC participated in and

formed various teams to address Youth issues, Senior issues, and identify opportunities to collaborate on regional data resources.

## **UNITED WAY BUDGET**

The 2009 board approved an Operating and Campaign Budget of \$149,462 with an additional \$5,000 to fund continued work on the Comal Community Needs Assessment and \$5,000 held for Emergency Response needs. Final actual operating and campaign expenses in 2009 totaled \$132,103.61.

The board approved a 2010 Operating and Campaign Budget of \$137,306.40 with an additional \$5,000 to fund continued work on the Comal Community Needs Assessment and \$5,000 held for Emergency Response needs. This does include affiliation fees to the United Way of America and United Ways of Texas.

Our Administrative and Fundraising overhead percentage is 7.4 percent (2008 IRS Form 990). UWCC strives to reduce this percentage.

## **RECOGNITION**

United Way does not exist without the work and dedication of many volunteers. Three of our Board Members terms ended: Armando Maese, Sherman Krause, and Judy Young. All three will be greatly missed. In 2009 we added Sam Lock, Elizabeth Trevino, Bob D'Alessandro, James Betterworth, and Mike Pfister.

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 have many retired individuals who are so generous and contribute to help people.

## 2009 BOARD OF DIRECTORS

### OFFICERS

|                           |                        |                   |
|---------------------------|------------------------|-------------------|
| Frank Suhr (3/3/2004)     | Attorney               | President         |
| Judy Young (10/2/2002)    | NB Chamber of Commerce | IPP               |
| Rhonda Zunker (2/9/2005)  | Broadway Bank          | President Elect   |
| Nathan Pence (12/7/2005)  | City of New Braunfels  | Allocations Chair |
| James Lowe (6/7/2006)     | Iron Horse Grill       | Campaign Chair    |
| Wendy Thompson (2/6/2008) | NBU                    | Treasurer         |

### OTHER BOARD MEMBERS

|                                     |                                   |
|-------------------------------------|-----------------------------------|
| Heidi Aleman(10/4/2006)             | Comal Independent School District |
| Blaine Best (1/2/2008)              | Christus Santa Rosa               |
| James Bettersworth (10/7/2009)      | Attorney At Law                   |
| Stuart Blythin (1/2/2008)           | Schlitterbahn                     |
| Dana Brandt (1/10/2007)             | Christus Santa Rosa               |
| Robert Camareno (12/3/2008)         | City of New Braunfels             |
| Renee Couch (12/3/2008)             | Comal County Treasurer            |
| Tracy Crowther (10/4/2006)          | TXI Hunter Cement                 |
| Robert D'Alessandro (9/2/2009)      | Wal-Mart Distribution Center      |
| Brandon Dietert (10/4/2006)         | New Braunfels Smokehouse          |
| Donna Eccleston (12/3/2008)         | Comal County Commissioner         |
| Dan Gibbens (5/7/2008)              | The SCOOTER Store                 |
| Leah Gomez (12/5/2005)              | Golden Landscape                  |
| Carolyn Gregory-Barclay (12/7/2006) | Consultant                        |
| Nelda Juarez (5/7/2008)             | CenterPoint Energy                |
| Sherman Krause (5/7/2003)           | Independent                       |
| Sam Lock (3/4/2009)                 | Attorney At Law                   |
| Armando Maese (6/7/2006)            | Comal ISD                         |
| Esther Miller-Brown (5/7/2008)      | Wal-Mart                          |
| Mike Pfister (10/7/2009)            | The SCOOTER Store                 |
| Monica Rodriguez (1/2/2008)         | Valero                            |
| Elizabeth Trevino (8/21/2009)       | Comal Independent School District |
| Richard Zapata (5/7/2008)           | New Braunfels City Council        |

### STAFF

|                 |                          |
|-----------------|--------------------------|
| Terry Robinson  | Executive Director       |
| Beverly Hilbert | Administrative Assistant |
| Letty Garnett   | Bookkeeper               |

## **LIST OF AGENCIES AND ALLOCATIONS IN 2009**

|   |                  |
|---|------------------|
| American Red Cross                                      | \$3,500          |
| Any Baby Can  | \$18,500         |
| Big Brothers, Big Sisters                               | \$5,000          |
| Boy Scouts  | \$12,500         |
| Bulverde Food Pantry                                    | \$14,500         |
| Bulverde Senior Center                                  | \$10,500         |
| CASA  | \$15,150         |
| Children's Advocacy Center of Comal County              | \$15,000         |
| Comal County Child Welfare Board                        | \$13,777.50      |
| Comal County Senior Citizen's Foundation                | \$52,500         |
| Communities in Schools of South Central Texas           | \$60,000         |
| Community Resource and Recreation Center of Canyon Lake | \$68,000         |
| Connections Individual and Family Services              | \$28,750         |
| Crisis Center of Comal County                           | \$43,282.50      |
| Girl Scouts of Southwest Texas                          | \$8,164.76       |
| ECl/Homespun  | \$37,500         |
| NB Christian Ministries/Volunteers in Medicine          | \$5,000          |
| RSVP  | \$7,000          |
| Salvation Army  | \$37,500         |
| SOS (paid on account with the San Antonio Food Bank)    | \$14,060.98      |
| SART  | \$16,202         |
| St. Jude's Ranch for Children-Emergency Shelter         | \$18,250         |
| St. Jude's Ranch for Children-Bulverde Campus           | \$21,685         |
| Tejas Smiles  | \$13,000         |
| Upstarts  | \$6,250          |
| YMCA of Comal County                                    | \$8,500          |
| <br>Total Allocations.....                              | <br>\$554,072.74 |