

2019-2020 ANNUAL REPORT

Leading the Way



United Way
of Greater Philadelphia
and Southern New Jersey

Contents

**1 UNITED TO
END POVERTY**

**3 YOUR INVESTMENT
AT A GLANCE**

6 EARLY LEARNING

7 CAREER PATHWAYS

8 FINANCIAL EMPOWERMENT

**9 MEETING
THE MOMENT**

**10 OUR PARTNERS
AND SUPPORTERS**

**17 REGIONAL BOARD
OF DIRECTORS**

**20 FINANCIAL POSITION &
STATEMENT OF ACTIVITIES**



DEAR FRIENDS,

When we began our campaign back in July 2019, we had no idea the turmoil that lay ahead. At the time, we were focused on growing awareness for the 2020 Census, relocating offices from a building we inhabited for more than 50 years, and continuing the development of partnerships to dismantle poverty throughout our region. Looking back, it seems like that was a lifetime ago.

As the COVID-19 pandemic swept the world, we found our feelings of uncertainty quickly turn into an overwhelming sense of urgency. In March 2020, our United Way jumped into action to identify the gaps and fuel solutions for immediate and long-term recovery. Collaborative initiatives, like the PHL COVID-19 Fund and PHLConnectED, quickly infused our region with more than \$18 million for urgent relief work while supporting the most vulnerable among us. At nearly 100 years old, it's what we know best. It's what we were made to do.

While many of us have adjusted to our new reality, the need continues. Philadelphia is still America's poorest big city, and the pandemic has plunged more individuals and families into the grips of poverty. But as United Way has always done in times of crisis, we work together to rise to the challenge and protect the building blocks of opportunity. As we gear up to commemorate our 100th year as an organization, we are looking ahead. In this report you will not only find an update on the impact of your investment in United Way, but a preview of our COVID-19 response efforts throughout 2020.

I want to thank you, our partners, supporters, friends, and neighbors for joining United Way in the fight against poverty across our region. I hope you enjoy reading through this report and reflecting on the mark you are making on our region, our country, and our world. We are truly stronger together.

With gratitude,

BILL GOLDERER
PRESIDENT & CEO





UNITED TO *end poverty*

OUR MISSION

UNITED WAY OF GREATER PHILADELPHIA AND SOUTHERN NEW JERSEY IS ON A MISSION TO END POVERTY AND EXPAND OPPORTUNITY SO THAT EVERY PERSON IN EVERY COMMUNITY CAN THRIVE. WE INVEST IN PROVEN NONPROFIT ORGANIZATIONS AND DELIVER AT-SCALE, LONG-TERM SOLUTIONS THAT BREAK THE CYCLE OF POVERTY.

OUR APPROACH



INVEST

in the most effective poverty-fighting nonprofits in our region



SUPPORT

a holistic family approach to break the cycle of poverty



ADVOCATE

for bold solutions and policy reform at the local, state and national level



BUILD

economic opportunities and proven initiatives for our region to thrive

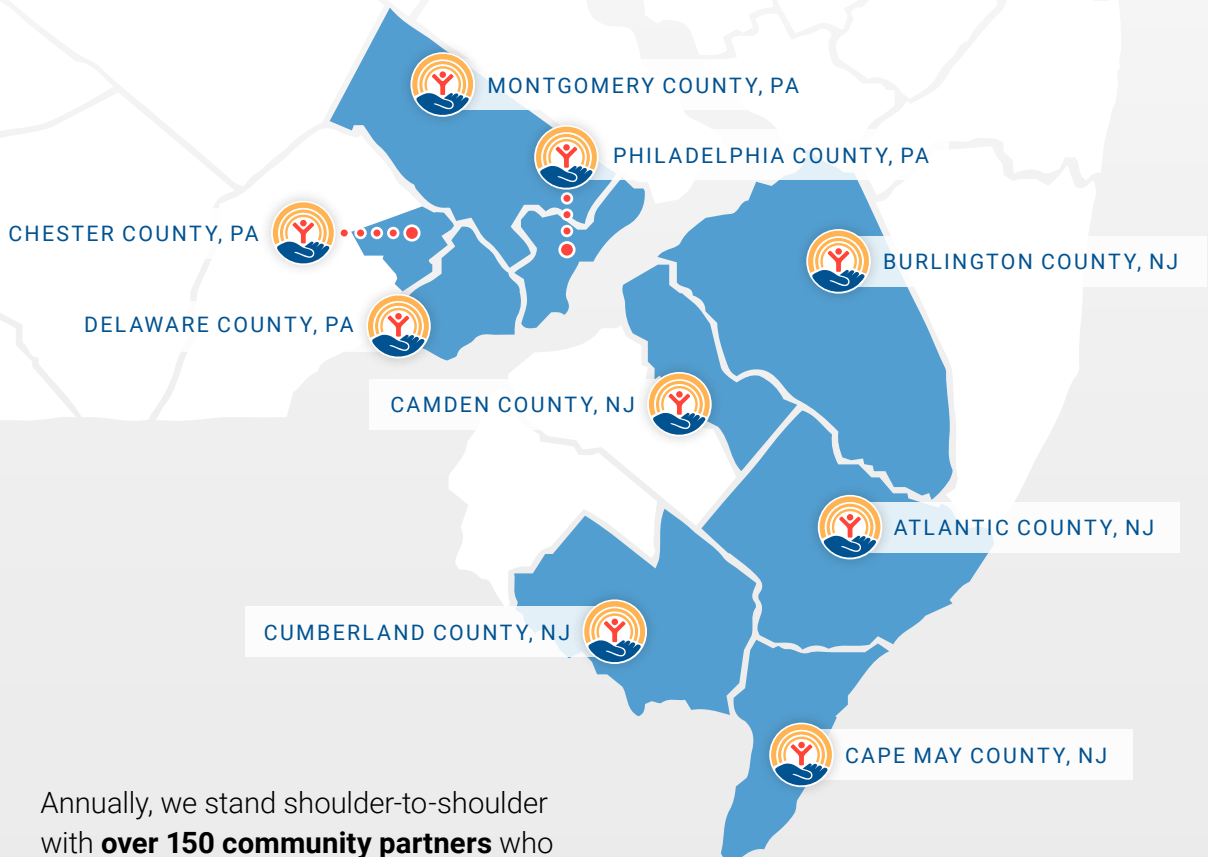


CONVENE

diverse voices and bold thinkers from business, government, funders, and nonprofits

REGION-WIDE IMPACT

Poverty is complicated. No single intervention or organization alone can disrupt it. From youth success to job training to financial security, your gift helps break the cycle of poverty and provides opportunity for all across our regional footprint.



Annually, we stand shoulder-to-shoulder with **over 150 community partners** who are on the front lines of reducing poverty throughout our region.

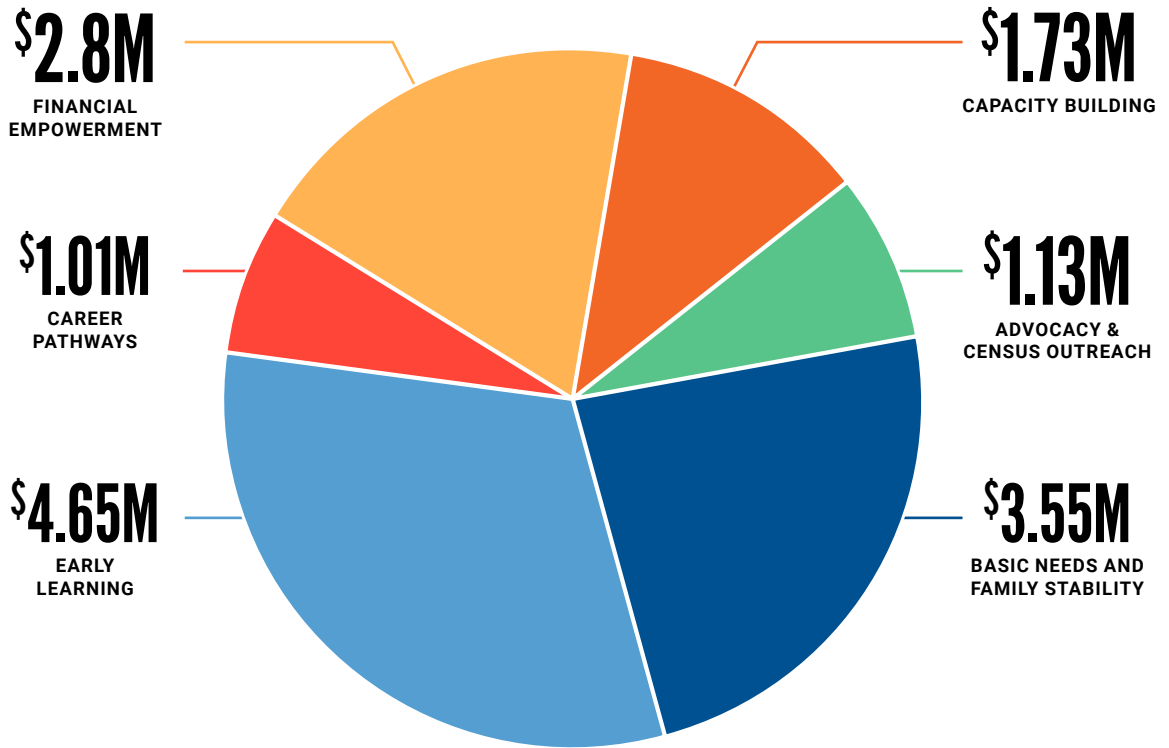


YOUR
investment
AT A GLANCE

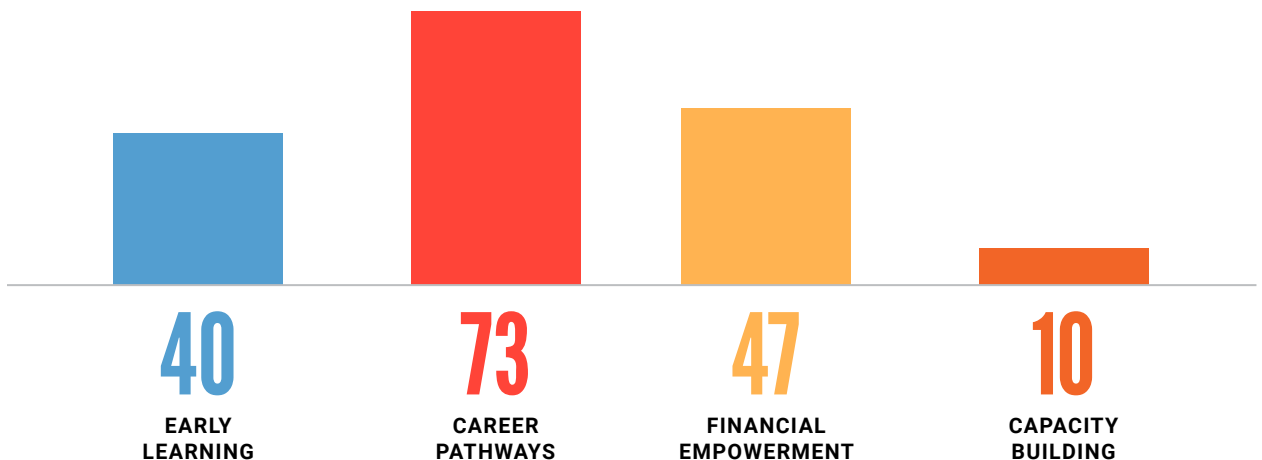
BECAUSE OF YOUR SUPPORT IN OUR IMPACT FUND

We invested **\$14.8 million** in fighting poverty across our region.

REGION-WIDE IMPACT



COMMUNITY PARTNERS BY FOCUS AREA



Career Pathways previously referred to as Opportunity, Employment & Entrepreneurship

EARLY LEARNING

47,218 children grades K-3

received early grade literacy guidance through partner programs

5,498 children, ages 5 and under

gained early development reading and writing skills through school readiness literacy programs

12,000 parents and caregivers

were empowered with the tools and skills needed for at-home learning



CAREER PATHWAYS

18,608 youth

in grades 4-9 participated in out-of-school programs and/or received individualized support

15,000 students

grades 4-9 participated in career exposure programming to help guide their future aspirations

13,188 students

grades 4-9 successfully advanced grade levels



FINANCIAL EMPOWERMENT

55,821 individuals

received free Volunteer Income Tax Assistance with a total of \$45.5 million returned to individuals to purchase necessities, and save for the future

11,226 individuals

received financial counseling or homeownership counseling to reach their financial goals

312 individuals

in 2019-20 are on track to homeownership through United Way's individual development account (IDA) program



EARLY LEARNING

Early childhood development and a quality education opens doors and opportunities. When students start their development off right, they are more likely to succeed academically and graduate from high school, be ready for college or a career.

In FY19-20, our Early Learning focus saw an increased need from our community partners to swiftly respond and mitigate the impact of the COVID-19 pandemic on child development and literacy.



Because of your support...

PROGRAM SPOTLIGHT

The global spread of COVID-19 brought new challenges to an already strained public education system. In 2020, **Vello**, a 1:1 virtual volunteer and reading program helped students stay engaged during summer months. United Way partnered with RSVP, a skills-based volunteer organization, to reach students virtually.

“

RSVP’s focus has always been to serve the educational and wellness needs in the community. We recognized Vello’s innovative programming and were eager to support this reading initiative which has become even more relevant with the onset of the pandemic and need for virtual learning. We’re grateful to be able to utilize United Way’s Vello platform to help combat the loss of reading skills students face during the summer months and beyond as we continue to face the challenges moving forward with a new school year.

- MICHELE MOLL
EXECUTIVE DIRECTOR, RSVP

CAREER PATHWAYS

Equipping individuals with the right tools and opportunities to succeed is critical for economic growth. With the impacts of the pandemic, there are now more people in our region “disconnected” from school and the workforce than ever before.

In FY19-20, our Career Pathways focus saw an increased need for helping people access resources for job training, minority-owned entrepreneurship programs and workforce development opportunities.



Because of your support...

PROGRAM SPOTLIGHT

Initiatives like the **Boeing On-The-Job Training (OJT) 2.0 Program** help feed our region’s job pipeline with skilled workers and increases participation from people of color and females in the Advanced Manufacturing Sector.

Graduates of the Boeing Boot Camp program, like Herbert Robinson, have experienced first-hand the benefits that job training can bring including the ability to gain new skills, develop confidence and receive a family sustaining wage.

“

I am now aware of the many opportunities available in manufacturing, not just production and quality assurance, but also transportation and logistics. Besides my family, I credit the success thus far in my manufacturing career journey to my Resources to Initiate Successful Employment (RISE) case manager and my Boeing Boot Camp instructors.

- **HERBERT ROBINSON**
EMPLOYEE AT SANDMEYER STEEL

FINANCIAL EMPOWERMENT

It's not enough to find and keep a good job— building long-term assets is essential to developing a solid foundation for the future.

From United Way's Volunteer Income Tax Assistance (VITA Program) to our Lubert IDA Program, we ensure that all community members have access to financial literacy and financial planning tools and resources to achieve lasting financial success.



Because of your support...

PROGRAM SPOTLIGHT

In April 2020, the Barrero family closed on their first home. By participating in United Way's **Lubert IDA Program**, they spent two and a half years developing financial literacy and budgeting skills, saving and building assets. The Barrero's hard work, leveraged by United Way's IDA, allowed them to accomplish an enormous goal.

“

So many IDA programs have disappeared due to lack of government support. We are lucky that Philadelphia's program is run by United Way. That means it's more flexible too. The typical IDA process must be completed in two years. The Barreros needed more time and United Way made that possible.

- WILL GONZALEZ
EXECUTIVE DIRECTOR, CEIBA

DID YOU KNOW?

Since the start of the VITA program, 363,754 returns have been filed to ensure working individuals and families keep more of what they earn - helping pay for reliable transportation, groceries, childcare and other basic needs.

MEETING *the moment*

IMPACT BY THE NUMBERS

Below is a brief preview of our ongoing COVID-19 relief work as of December 2020.

\$1M

\$1M RAISED FOR THE 2020 CENSUS

\$18M+

OVER \$18M RAISED FOR COVID-19 FUND

12,000+

OVER 12K STUDENTS AND FAMILIES CONNECTED TO INTERNET THROUGH PHLCONNECTED

75,000+

OVER 75,000 CALLERS SERVED THROUGH 211

2-1-1 HOTLINE

United Way's 2-1-1 hotline provides callers with free, confidential access to thousands of programs and services that can help with everyday needs and in crisis situations. When Covid-19 struck, calls for support increased by 200% and overall demand increased by 50%.

PHL COVID-19 FUND

In March 2020, we came together with the City of Philadelphia and the Philadelphia Foundation to launch the rapid response PHL COVID-19 Fund for frontline organizations in our region. Raising over \$18M in less than 10 months, it quickly became the region's largest relief and response fund.

2020 CENSUS

Last fall, we announced a match grant for every new donation to Philly Counts, up to \$500,000, to raise a total of \$1 million in new funding to target greater engagement of historically under counted communities in the region.

PHLCONNECTED

We collaborated with The City of Philadelphia, School District of Philadelphia, Comcast and multiple philanthropic partners to help K-12 Philadelphia students and families connect to the internet through PHLConnectED.

“

United Way's commitment to reducing poverty in the city creates a natural opportunity to partner on work related to the 2020 Census. This generous contribution by United Way will support a complete and accurate count which will be felt throughout the city for the next 10 years.

- STEPHANIE REID
EXECUTIVE DIRECTOR, PHILLY COUNTS 2020

OUR PARTNERS AND SUPPORTERS

Thank You

FOR MAKING A DIFFERENCE IN OUR COMMUNITY.

We thank the outstanding corporations, foundations and individuals who, through their generous gifts, make our work to dismantle poverty and expand opportunity possible.

MILLION DOLLAR ORGANIZATIONS

We gratefully acknowledge these Corporate Partners that contributed \$1 million or more to and through United Way.



OUR PARTNERS

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Thank you to our partners whose generous Corporate and Foundation contributions to the Impact Fund totaled \$10,000 or more.

(not including employee giving contributions)

\$1,000,000 and Above

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\$500,000-\$999,999

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United Way Worldwide

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REGIONAL BOARD OF DIRECTORS

Year ending June 30, 2020

J. Gordon Cooney, Jr., Board Chair,
Morgan Lewis & Bockius LLP

Darrell Giles, Treasurer,
Citrin Cooperman

Phil Norcross, Secretary,
Parker McCay P.A.

Marcus Allen,
Big Brothers Big Sisters
Independence Region

Ethelind Baylor

Dennis Bianchi,
WTFX-TV, Channel 29, Fox

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Simkiss & Block

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CHIE, Pivot Strategies, LLC

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Comcast Corporation

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Aqua America, Inc.

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Michael DiCandilo

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Philadelphia Council AFL-CIO

Frank Frabizzio,
PwC

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David Greed,
KPMG, LLP

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Grimm & Grove Communications

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Liberty Property Trust

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Holman Enterprises

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MBA, Stockton University

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Image Studios Philadelphia

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Salem Community College

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Exude, Inc.

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Main Line Health System
Bryn Mawr Hospital

Sharmain Matlock-Turner,
Urban Affairs Coalition

Pamela Sarne McCormick,
SEPTA

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Archer & Greiner, P.C.

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Deloitte LLP

Ned Montgomery

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PECO

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RHU CLU, Arthur J. Gallagher & Co.

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Ups-Chesapeake District

Ellen Patterson,
Wells Fargo Financial Services

Michael J. Renna,
South Jersey Industries

Chari Richardson,
TRC Staffing Services

Jennifer Rodriguez,
Greater Philadelphia Hispanic
Chamber of Commerce

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Salvesson Stetson Group, Inc.

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Tierney

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The Dow Chemical Company

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FS Investments

Paul A. Tufano, Esq.,
Independence Blue Cross

James E. Turner,
Chester Water Authority

Susan Van Buren

Harriet G. Weiss,
Hippographics

John L. Walsh,
UGI Corporation

Denean Williams,
4Alphas Capital

Dalila Wilson-Scott,
Comcast Corporation &
Comcast Foundation

Rob Wonderling,
Chamber of Commerce
for Greater Philadelphia

Special thanks to those board members who ended their tenure of service in 2019-2020:

Douglas Allen

Andrea Anania

John Armand

Rochelle "Chellie" Cameron

John Chou

Marilou Watson

Sonya Weigle

CONDENSED STATEMENT OF FINANCIAL POSITION

Year ending June 30, 2020

ASSETS

Cash and cash equivalents	\$32,357,048
Short-term pledges receivable, net	\$9,622,243
Grants receivable	\$4,278
Short-term legacies and bequests receivable	\$0
Prepaid expenses and other assets	\$218,011
Investments	\$57,266,003
Property and equipment, net	\$707,710
Long-term pledges receivable, net	\$934,042
Long-term legacies and bequests receivable, net	\$0
Cash surrender value of life insurance policies	\$53,542
Total Assets	\$101,162,877

LIABILITIES & NET ASSETS

Liabilities:

Distributions payable to agencies	\$13,184,937
Payroll Protection Program Loan	\$736,705
Accounts payable and accrued expenses	\$3,166,889
Long-term distributions payable to agencies	\$38,548
Total Liabilities	\$17,127,079

Net Assets:

Unrestricted	\$52,283,369
Undesignated	\$7,094,067
Board-designated	\$45,189,302
Temporarily restricted	\$20,001,536
Permanently restricted	\$11,750,893
Total Net Assets	\$84,035,798

Total Liabilities and Net Assets	\$101,162,877
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CONDENSED STATEMENT OF ACTIVITIES

Year ending June 30, 2020

PUBLIC SUPPORT AND REVENUE—ASSETS

Public Support:

Gross annual campaign	\$33,113,203
Amounts designated to other organizations by donors	\$(13,877,397)
Provision for uncollectible pledges	(\$1,169,285)
Net Annual Campaign	\$18,066,521

Other Public Support:

Grants and other contributions	\$183,099
Legacies and bequests	\$256,644
Donated materials and services	\$695,589
Amounts received from other United Ways	\$113,614
Total Other Public Support	\$1,248,946

Other Revenue:

Administrative fees on donor designations	\$183,099
Contributions	\$256,644
Rental and miscellaneous income	\$695,589
Investment income and realized and unrealized gains used for operations	\$113,614
Total Other Revenue	\$1,248,946

Total Public Support and Other Revenue	\$22,664,418
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DISTRIBUTIONS TO AGENCIES AND EXPENSES—OPERATING ACTIVITIES

Program Services:

Net Distributions to Agencies	\$21,508,553
Distribution to agencies for program services, targeted investments and grant-funded initiatives	\$14,423,189
Less amounts designated to other organizations by donors	\$(14,379,338)
United Way programs and services	\$4,344,166
Donated programs and services	\$395,731
Total Program Services	\$19,163,086

DISTRIBUTIONS TO AGENCIES AND EXPENSES—OPERATING ACTIVITIES CONTINUED

Support Services:

Fundraising and marketing expenses	\$2,883,379
Donated fundraising and marketing materials and services	\$0
General and administrative expenses	\$3,643,528
Donated general and administrative materials and services	\$299,858
Total Support Services	\$6,826,765
Total Distributions and Expenses	\$25,989,851

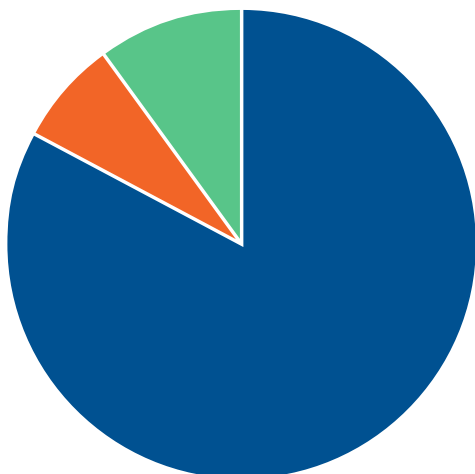
Change in Net Assets from Operating Activities **\$ (3,325,433)**

NON-OPERATING ACTIVITIES

Investment income, net of spending policy	\$1,206,579
Gain on sale of fixed assets, net	\$0
Other income/expense	\$0
Total Non-Operating Activities	\$1,206,579

Net Assets, Beginning of Year	\$86,154,652
Net Assets, End of Year	\$84,035,798
Total Change in Net Assets	\$ (2,118,854)

Total Program Services, Including Donor Designations **\$33,542,424**



NUMBERS BELOW EXCLUDE DONATED SERVICES

TOTAL PROGRAM SERVICES (83%)
\$33,600,000

TOTAL FUNDRAISING & MARKETING (7%)
\$2,900,000

TOTAL GENERAL & ADMINISTRATIVE (10%)
\$4,000,000

*This pie chart provides a breakdown of total operating expenses, excluding donated materials and services. This breakdown closely aligns with our overhead rate as calculated on the IRS Form 990. United Way charges a cost recovery fee of 12.5% on donated gifts in order to raise, collect, administer and distribute gifts from campaign revenue. This rate is lower than total overhead in the chart above, as the cost recovery rate is intended to recover overhead expenses, net of offsetting revenue, such as investment income and rental income, from campaign revenue only.

TOTAL DISTRIBUTIONS & EXPENSES*



Join Us. YOUR IMPACT MATTERS.

It's critical to expanding opportunities to reduce poverty in our region. There are many ways that you can make a significant impact and help our region thrive.

LEARN

MORE ABOUT OUR PROGRAMS
AND SERVICES

DONATE

TO THE IMPACT FUND TO
SUPPORT OUR WORK

GET INVOLVED

VOLUNTEER, NETWORK OR RUN
A WORKPLACE CAMPAIGN



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Thank You

**FOR HELPING US IN THE FIGHT
TO END POVERTY AND EXPAND
OPPORTUNITY FOR ALL.**



**UNITED WAY OF GREATER PHILADELPHIA
AND SOUTHERN NEW JERSEY**