



United Way of Salt Lake's
PROMISE
CHANGING THE ODDS

so that all children and their families, regardless of their circumstances, have the same chance to succeed in school and in life.

ANNUAL REPORT | 2013-
to the community | 2014

Dear Friends,

Thanks to the hard work, contributions, and partnership of thousands of individuals and organizations, 2013-14 was a historic year of impact for United Way of Salt Lake. Together, we grew our donor engagement, expanded our Collective Impact partnerships, and created new and innovative solutions to address the most serious social challenges in our neighborhoods and communities.

Our corporate partners and donors have been engaged in our work in more meaningful ways than ever before. By developing ongoing volunteer programs with our Schools and Centers, hosting donation drives, responding to advocacy action alerts, and participating in the planning and evaluation of our work, companies are creating year-round opportunities for their employees to better understand community issues and how they can be part of the solution.

With the addition of two new schools, the Promise Kearns pipeline is serving many more students and families. United Way of Salt Lake recently partnered with South Kearns Elementary and Kearns High School. They join Oquirrh Hills Elementary and Kearns Junior High to support hundreds more students, starting as early as preschool, and all the way through high school graduation, with aligned strategies at every step along the way.

In partnership with Goldman Sachs, JB Pritzker, Salt Lake County, Granite School District and Voices for Utah Children, we launched the first-ever results-based financing vehicle to expand access to high-quality preschool for an additional 600 at-risk children. We continued this work by supporting and influencing the passage of HB96, the Utah School Readiness Initiative. More children throughout the state will now enter kindergarten ready to learn and stay on track through their entire school experience. Private investors now have the option to partner with the state to invest in preschool programs that demonstrate lasting results and save taxpayer dollars.

Generous donors, dedicated collaborative partnerships, meaningful volunteer engagement, and targeted advocacy add up to real and measurable positive results for our community. We know that we are not alone in this work and we embrace all of our strategic partners who believe, as we do, that together, we can do more than help one child beat the odds, we can change the odds for entire communities.

We appreciate your trust, confidence, and above all, your partnership with United Way of Salt Lake.

Sincerely,



A handwritten signature in black ink, appearing to read 'A. Alexander'.

Allen B. Alexander
Chair, Board of Directors
Chairman and CEO, Savage

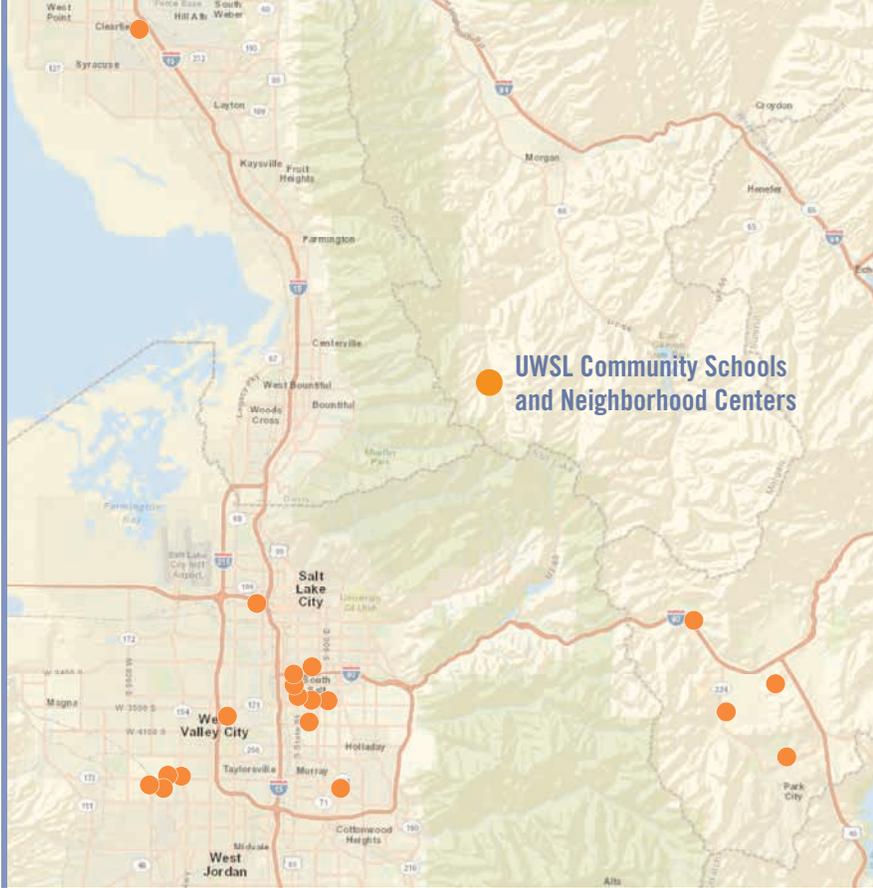


A handwritten signature in black ink, appearing to read 'Deborah S. Bayle'.

Deborah S. Bayle
President and CEO
United Way of Salt Lake

7 Promise Partnerships,
19 Neighborhood Centers,
48 Promise Partners,
with a shared commitment
to support
children and families from
cradle to career.

- Promise Clearfield
- Promise Guadalupe
- Promise Kearns
- Promise Park City
- Promise Refugee Youth
- Promise South Salt Lake
- Promise West Valley



Changing the Odds 2013-2014

Last year, in our Promise Partner communities

More than **600**
additional
children were
enrolled in
high-quality preschool¹

Improved Math Skills²
Eighth graders **UP 13%**
All grades **UP 8%**

Kids who received
immunizations³ **UP 12%**
1,721
families received
critical healthcare
at Neighborhood
Centers⁴

Refugee youth
reading proficiency⁵
UP 11%

In 2013, United Way of Salt Lake worked together with



582
Organizations



33,621
Donors



\$20,594,456
In donations



10,017
Volunteers contributed over
24,300
hours of community service

2-1-1 Utah
Get Connected. Get Answers.



96,818 Calls
received



155,604 Referrals
made

United Way of Salt Lake **expanded its cradle to career pipeline in Kearns** with the addition of two community schools, South Kearns Elementary and Kearns High School. The Promise Kearns partnership now works to connect families with vital educational programs, social services, health resources, and much more at four Community Schools.

(Source: USOE PSD Gateway, Utah School Report, 2013)

Promise Partners celebrated **Guadalupe School's 56 percent gain in achievement and growth** this year, a huge accomplishment for students, teachers, administration, and partners considering they were ranked in the bottom 28 percent during 2011-2012. (Source: USOE PSD Gateway, Utah School Report, 2013)

United Way of Salt Lake and many partners launched the **first-ever results-based financing vehicle to expand access to preschool for at-risk children**. Six hundred additional at-risk three and four year-olds gained access to high-quality preschool in United Way of Salt Lake's Promise Partnership communities. This high-quality program has successfully closed the achievement gap in Language Arts and math. This program reduced the achievement **gap in language arts from 22 percent to 5 percent** and in Math it was effectively eliminated by 3rd grade.



Collective Impact



Because of the intentional hard work of students, teachers, and all the Promise South Salt Lake partners, **Granite Park Junior High Community School saw a 28 percent improvement in achievement and growth this year.**

(Source: USOE PSD Gateway, Utah School Report, 2013)

United Way of Salt Lake formed the **Promise Partnership Regional Council**, a cross-sector group of community and state leaders that works to establish goals and track progress throughout all United Way of Salt Lake's Promise Partnership Communities. The Council is co-chaired by Mark Bouchard, founding Chair of Prosperity 2020 and Senior Managing Director, CBRE, and Dr. Martin Bates, Superintendent of Granite School District.

United Way of Salt Lake championed the expansion of high-quality preschool for at-risk students and, together with many partners, influenced the **passage of HB96**, the Utah School Readiness Initiative (Hughes, Urquhart). **Utah is now the first state to embrace pay for success financing for early education programs.**

The Utah State Legislature expanded the public-private partnership between **United Way 2-1-1 and the state of Utah with a \$500,000 appropriation**, ensuring this vital state resource is available to more Utahns in crisis, as well as matching people to volunteer opportunities.



United Way of Salt Lake **Tocqueville Society's** 79 members collectively **contributed over \$1 million** in membership gifts to United Way of Salt Lake. Tocqueville welcomed five new members and engaged members in volunteerism, networking, and leadership opportunities.

This year, United Way of Salt Lake launched a new Donor Network, **Leadership Circle**. Members are 41 years or older and donate at least \$1,500 annually to UWSL, collectively **investing nearly \$330,000 in our community**. **193 members strong, Leadership Circle** is focused on ensuring kids are on track in reading, math, and science. Nearly 250 attendees helped celebrate the launch of this diverse group on March 6.

United Way of Salt Lake **Women's Leadership Council** of nearly 200 members spent more than 130 hours volunteering as mentors and tutors, giving classroom presentations, and facilitating college and career tours and workshops. This year, **WLC members invested more than \$460,000 to support Women for Educational Achievement**, an initiative empowering girls and teens to complete high school and go on to post-secondary education.



Engagement

United Way of Salt Lake's **366 Young Leaders** spent more than **230 hours** volunteering one-on-one with students at Guadalupe School to improve reading comprehension, math, and science skills. *Young Leaders* also actively advocated with United Way of Salt Lake to pass early education legislation, spending more than **125 hours** on the Hill reaching out to lawmakers.

More than **4,500 volunteers from 100 companies** participated in **115 one-day service projects** during United Way **Day of Caring** September 13. Volunteer projects ranged from tutoring and reading in classrooms, providing art and activities for kids, conducting career fairs, and completing maintenance projects like painting, weeding, and other community beautification. Collectively, volunteers **saved the community over \$770,000** in labor costs alone.

As a partner in the **Read. Graduate. Succeed.** volunteer initiative, United Way of Salt Lake recruited nearly **700 volunteers** who were matched with academically-struggling students at UWSL's Community Schools. Through one-on-one tutoring, volunteers helped **85 percent** of the participating students improve by three or more reading levels.



United Way of Salt Lake launched a grassroots campaign encouraging the passage of **HB96**, The Utah School Readiness Initiative. Over **4,300 individuals signed the pledge to #Stand4PreK**, more than **22,000 emails** and letters were sent by UWSL advocates, and **130 volunteers** worked to educate the community about the importance of high-quality preschool.

The Changing the Odds Founding Council, a cross-sector collaboration between leading philanthropists, civic leaders, and business leaders, was created to help inform and engage our largest investors in our work on the ground. The Council held its first annual meeting in November and reviewed UWSL's results reportcard.



2012-13 FINANCIAL INFORMATION

Balance Sheet as of June 30, 2013

Assets	\$28,468,244
Liabilities	\$2,173,352
Unrestricted Net Assets	\$9,675,754
Restricted Net Assets	\$16,619,138

Source of Funds

Community Fund	\$7,310,714
Changing the Odds Campaign	\$10,579,271
Restricted grants	\$900,942
Sponsorships	\$462,662
In-kind contributions	\$589,591
Investment returns	\$215,142
Other	\$91,134
Total	\$20,149,456

Allocation of Funds

Supporting Services	\$2,501,741
Programs	\$3,589,635
Restricted for Changing the Odds programs	\$14,058,080
Total	\$20,149,456

See complete audited financial statements at UW.ORG

TRANSPARENCY

All supporters, partners and others have access to all United Way of Salt Lake documents on our website at UW.ORG including:

- Our mission and how we accomplish it
- Annual audited financials
- IRS tax return (Form 990)
- Annual Report
- Board of Directors roster
- Staff roster
- Partner listing
- Bylaws
- Governance policies

United Way of Salt Lake received a four-star rating, or 70/70, for exceptional transparency and accountability from Charity Navigator



United Way of Salt Lake is a Better Business Bureau (BBB) Accredited Charity



Accountability

ACCOUNTABILITY CHECKLIST

United Way of Salt Lake is dedicated to being transparent and accountable in all that we do

Does United Way of Salt Lake have an active Board of Directors comprised of citizen leaders that meets regularly? **YES**

The Board is comprised of 46 local community leaders representing business, government and other sectors.

Does the Board of Directors review and approve the annual budget and quarterly financial statements? **YES**

The annual budget and quarterly financial statements are approved by the Board following thorough review by the Administration/Finance Committee, and the Executive Committee.

Does United Way of Salt Lake have an Audit Committee? **YES**

The Audit Committee is comprised of financial and business experts.

Does the Board of Directors review and approve the annual independent audit report, as well as the auditor's management letter comments? **YES**

The annual audit is approved by the Board following thorough review by the Audit Committee, Administration/Finance Committee, and the Executive Committee.

Does United Way of Salt Lake have additional oversight committees? **YES**

Administration/Finance Committee, Governance Committee, and Investment Committee.

Does United Way of Salt Lake have ethics and conflict of interest policies? **YES**

Board members, staff, and committee members are required to sign a Code of Ethics and a Conflict of Interest Statement annually.

Does United Way of Salt Lake have a diversity and inclusion policy? **YES**

Does United Way of Salt Lake have a "whistleblower" policy? **YES**

Is the CEO's performance and compensation reviewed and approved? **YES**

The Board Chair and Executive Compensation Committee conduct an annual performance and compensation review of the CEO. This review is ratified by the Executive Committee.

Is the senior management team's performance and compensation reviewed and approved? **YES**

The CEO conducts annual performance appraisals of the senior management team. These appraisals, along with compensation levels of the senior management team, are reviewed and ratified by the Executive Compensation Committee and the Executive Committee.

Does United Way of Salt Lake post its annual independent audit, annual IRS tax return (Form 990) and its current IRS tax exempt determination letter on its website? **YES** *Available for download.*

Does United Way of Salt Lake have a written donor information privacy policy? **YES**

A copy of the policy is available on the website.

Does United Way of Salt Lake prohibit providing donor information to third parties? **YES**

Does the Board review and approve all funding decisions? **YES**

Funding recommendations are reviewed by the Collective Impact Council before going to the Board for approval.

Is United Way of Salt Lake continually strengthening its accountability measures and standards? **YES**

United Way of Salt Lake's Board and staff continually seek new, innovative measures to improve our levels of accountability.

VOLUNTEER-LED ORGANIZATIONAL SELF-ASSESSMENT

Every three years, United Way of Salt Lake evaluates organizational performance by conducting a volunteer-led self-assessment. The last organizational self-assessment was conducted in fall, 2011 and will be conducted again in the fall of 2014. The results are available on our website UW.ORG.

Membership Disclosure

United Way of Salt Lake does not have members and does not charge dues from its partner organizations.

Board of Directors 2013-2014

Allen B. Alexander

Chairman and CEO
Savage

Deborah S. Bayle

President and CEO
United Way of Salt Lake

Mark H. Bouchard

Senior Managing Director
CBRE

Jake Boyer

President & CEO
The Boyer Company

Chris Bray

Executive Director
Utah Nonprofits Association

Christine B. Buckley

CFO
Swire Coca-Cola, USA

David L. Buhler

Commissioner of Higher Education
Utah System of Higher Education
State Board of Regents

Mona Lyman Burton

Partner
Holland & Hart LLP

Jennifer Danielson

President, Utah Plan
Regence BlueCross BlueShield of Utah

Jose Enriquez

Executive Director / Founder
Latinos in Action

Jay Francis

Executive Vice President/Corporate
Affairs & Miller Family Philanthropy
Larry H. Miller Group

Christian K. Gardner

President
Gardner Company

Kem C. Gardner

Chairman
Gardner Company

Laren Gertsch

Sr. Advisor to VP GM Northwest Pipeline
Williams Northwest Pipeline

Jamie Glenn

Manager, Major Initiatives
The Church of Jesus Christ of
Latter-day Saints

Natalie Gochour

Associate Dean
David Eccles School of Business,
University of Utah

David R. Golden

Executive Vice President
Wells Fargo

Neil Hafer

Vice President/General Manager
Enterprise Holdings Inc.

Representative Greg Hughes

Utah State House of Representatives

Paula Green Johnson

Community Advocate

Senator Pat Jones

Utah State Senate

Jeffrey K. Larsen

Vice President-Regulation
Rocky Mountain Power
a Division of PacifiCorp

Blake Larson

President
ATK Aerospace Group

Bruce Larson

Managing Director
Goldman, Sachs & Co.

LeeAnne B. Linderman

Executive Vice President
Zions Bank

Thomas M. Love

President
Love Communications

Mayor Ben McAdams

Salt Lake County

Kyle McSlarrow

Regional Vice President
Comcast

Kathie Miller

Trustee
The Mark & Kathie Miller Foundation

John W. Milliken

President
Milcom, Inc.

Mikelle Moore

VP, Community Benefit Department
Intermountain Healthcare

Sean Mulvihill, M.D.

CEO, Medical Group
AVP for Clinical Affairs
University of Utah Health Care

Michael Petrogeorge

Shareholder
Parsons Behle & Latimer

Ray D. Pickup

President and CEO
Workers Compensation Fund

Bruce T. Reese

President and CEO
Hubbard Radio

Gavin M. Reese

Shareholder
Ray Quinney & Nebeker

Kevin Ricklefs

Vice President, Administration
CHG Healthcare Services, Inc.

Kevin P. Salmon

Vice President, Sales and Client Solutions
O.C. Tanner Company

Jeff Simpson

President and CEO
Bonneville/DMC

Sean M. Slatter

President and CEO
Logistic Specialties, Inc.

Jennifer Smith

Executive Vice President and
Director of Banking Operations
Zions Bancorporation

Greg Summerhays

Director of Public Relations
Workers Compensation Fund

Jill Taylor

President
KeyBank N.A., Utah District

Karma M. Thompson

Vice President, SLC Refinery
Tesoro Refining & Marketing Co.
Mountain Region

Scott C. Ulbrich

Financial Advisor
Robert W. Baird & Co.

Craig C. Wagstaff

Executive Vice President and COO
Questar Gas Company

Heidi Walker

Chief Operating Officer
Salt Lake Chamber

Linda Wardell

General Manager
City Creek Center

Michael Weinholtz

The Weinholtz Family Foundation

Rick Widner

Director, Network Administration
Management & Training Corporation

Mayor Cherie Wood

City of South Salt Lake

Thomas Wright

President
Summit Sotheby's
International Realty

M. Craig Zollinger

President and CEO, Utah
JPMorgan Chase, N.A.

Executive Committee 2013-2014

Allen Alexander

Chair, Board of Directors

Scott Ulbrich

Vice Chair, Board of Directors

Mona Lyman Burton

Immediate Past Chair, Board of Directors

Deborah Bayle

President and CEO

Blake Larson

Chair, Administration/Finance Committee

Jeffrey Larsen

Chair, Audit Committee

Kem Gardner

Co-Chair, Changing the Odds Campaign/
Founding Council

Kathie Miller

Co-Chair, Changing the Odds Campaign/
Founding Council

John Milliken

Chair, Collective Impact Council

LeeAnne Linderman

Corporate Secretary

Sean Slatter

Davis County Liaison

Craig Zollinger

Chair, Governance and
Ethics Committee

Bruce T. Reese

Chair, Investment Committee

Thomas Love

Chair, Marketing

Paula Green Johnson

Chair, Public Policy Committee

David Golden

Chair, Resource Development

Craig Wagstaff

Chair, 2-1-1 Steering Council

UWSL Senior Management Team

Deborah Bayle _____ President and CEO

Rebecca Dutson _____ Executive Vice President and Chief Development Officer

Bill Crim _____ Senior Vice President of Collective Impact and Public Policy

Kevin Grimmett _____ Chief Financial Officer

Jerilyn Stowe _____ Vice President of Marketing and Communications



Cornerstone Partners

The following generous and committed corporations and foundations direct their resources toward underwriting our costs of doing business.

\$100,000 and above



\$50,000 - \$99,999



\$25,000-\$49,999



\$10,000-\$24,999

3M Health Information Systems	Parsons Behle & Latimer
Cargill, Inc. Industrial Salt Division	Regence BlueCross BlueShield of Utah
CHASE	Swire Coca-Cola, USA
Chevron USA, Inc.	TD Williamson Global Pipeline Integrity
Deluxe Corporation	The Katherine W. Dumke and Ezekiel R. Dumke, Jr. Foundation
Emma Eccles Jones Foundation	U.S. Bank
Holly Frontier	Utah Metal Works, Inc.
Jacobsen Construction Company, Inc.	Utility Trailer Manufacturing Co.
Kern River Gas Transmission Company	
KeyBank N.A.	

\$5,000-\$9,999

BD Medical	Target
Jcpenney Salt Lake Accounting Center	

UP TO \$4,999

AcuSport	Intermountain Bobcat
Advantage Workers Compensation Insurance Co.	L-3 Communications
Ash Grove Cement Company	M H T N Architects, Inc.
CenturyLink	Marriott International, Inc., Corporate Headquarters
CH2M Hill	Moreton & Company
Chapman and Cutler LLP	Reaveley Engineers & Associates, Inc.
Cirris Systems Corporation	Rockwell Collins
Cohne, Rappaport & Segal, P.C.	Sweet Candy Company
Cummins Rocky Mountain, LLC	United Health Group
First National Bank of Layton	Wal-Mart Distribution Center

As of April 1, 2014

Community Champions

The following organizations invest in our community with a combined employee and corporate per capita gift of \$100 or more—including employee, corporate, sponsorships, and in-kind donations.

3M Health Information Systems	Ledingham Properties
Advantage Workers Compensation Insurance Company	Logistic Specialties, Inc.
Alliance Data	Love Communications
AT&T	M H T N Architects, Inc.
ATK Aerospace Systems Group	Management and Training Corporation
Balkamp, Inc. Western Division	Mark Miller
Ballard Spahr, LLP	Mark Miller Subaru Midtown
Bank of America	Mark Miller Subaru, LLC - South Towne
Beneficial Financial Group	Mark Miller Toyota, LLC
Best Buy Retail District 57	Merrill Lynch
Bountiful Community Food Pantry	Mountain West Bank
The Boyer Company	Nordstrom
Cargill, Inc. Industrial Salt Division	Nordstrom Fashion Place Store # 32
Carl's Jr. Restaurants Carl Karcher Enterprises, Inc.	Nordstrom Rack Store # 33
CBIZ MHM, LLC	Nordstrom Rack Store #71
Ceridian Corporation	O.C. Tanner Company
Chapman and Cutler LLP	Olympus Aerial Surveys, Inc.
Chevron, USA Inc.	Parsons Behle & Latimer
CHG Healthcare Services, Inc.	The People's Health Clinic
CIGNA	PricewaterhouseCoopers, LLP
Cirris Systems Corporation	Quantronix, Inc.
Cohne, Rappaport & Segal, P.C.	Questar Corporation
Comcast	Rape Recovery Center
Costco	Reaveley Engineers & Associates, Inc.
Costco Wholesale - Bountiful	Rockwell Collins
Costco Wholesale - Salt Lake Depot #584	Rocky Mountain Advisory, LLC
Deloitte & Touche, LLP	Rocky Mountain Power A Division of PacifiCorp
Deluxe Corporation	Robert W. Baird & Co.
Deseret Digital Media, Inc.	Sabot & Rice, Inc.
Deseret Management Corporation	Salt Lake Chamber
EnerBank USA	Savage Services Corp
Enterprise Rent-A-Car	Simpson & Company
EY	Stoel Rives, LLP
Fabian Law	Swire Coca-Cola, USA
Federal Reserve Bank of San Francisco	Target Bank
Salt Lake City Branch	Target Stores District Office Store # 400
GE Capital Bank	The Taubman Company LLC
GE OEC Healthcare	TD Williamson Global Pipeline Integrity Center
Goldman, Sachs & Co.	Temple Square Hospitality Corporation
Guadalupe School	Tesoro Refining & Marketing Co. Mountain Region
Harland Clarke American Customer Contact Center	U.S. Bank
Harland Clarke Forms Office	United Way of Salt Lake
Hexcel Corporation	UPS
Holland & Hart LLP	UPS Corporate Customer Service Center
HollyFrontier Corporation	UPS Freight Services
Intermountain Bobcat	UPS Mail Innovations
Intermountain Healthcare	UPS Supply Chain Solutions
Jcpenney Shared Services Center	Utah Legal Services, Inc.
The Katherine W. Dumke and Ezekiel R. Dumke, Jr. Foundation	Utah Metal Works, Inc.
Kellogg - Clearfield Plant	Utah Partners for Health
Kern River Gas Transmission Company a MidAmerican Energy Holdings Company	Voices for Utah Children
KeyBank N.A.	Washington Federal Savings
Kohl's Centerville #1227	Williams - Northwest Pipeline
KSL Broadcast Group	Woodbury Corporation
	Workers Compensation Fund
	Zachry Industrial, Inc.
	Zions Bank

As of April 1, 2014

Promise Partners

These partners engage with UWSL in a Collective Impact collaboration to support children and families from cradle to career.

Americorps Read. Graduate. Succeed	Midtown Health Clinic
Asian Association of Utah	Park City Community Foundation
Big Brothers Big Sisters	Park City Education Foundation
Boy Scouts of America	Park City School District
Boys and Girls Clubs of South Valley	People's Health Clinic
Catholic Community Services	Prosperity2020
Children's Express	Salt Lake CAP Head Start
Children's Service Society	Salt Lake Community College
City of South Salt Lake	Salt Lake County
Comunidades Unidas	Salt Lake County Youth Services
Community Nursing Services	Sealants for Smiles
Davis Behavioral Health	University of Utah
Davis School District	Utah Department of Health
EducationFirst	Utah Department of Workforce Services
English Skills Learning Center	Utah Health Policy Project
Family Connection Center	Utah Nonprofits Association
Granite Pre-K	Utah Partners for Health
Granite School District	Utah State Governor's Office
Holy Cross Ministries	Utah State Office of Education
International Rescue Committee	Utah System of Higher Education
Junior Achievement of Utah	Utah State University
Latinos in Action	Voices for Utah Children
LDS Church, Humanitarian Services	Westminster College
Lit'l Scholars	YMCA of Northern Utah