ADVANCING THE COMMON GOOD AROUND THE WORLD

2013 UNITED WAY WORLDWIDE ANNUAL REPORT
UNITED WAY AROUND THE WORLD

UNITED WAY VISION

United Way envisions a world where all individuals and families achieve their human potential through education, financial stability and healthy lives.

Imagine a world that fosters hope and opportunity for everyone. A world where...

- All children receive a quality education that offers a pathway to a brighter tomorrow.
- The cycle of poverty and financial dependence ends, and productive livelihoods begin for even the most disadvantaged.
- Everyone receives effective health care that improves quality of life.
- Communities not only set significant and measurable goals to advance these fundamental elements of human development, but achieve them.

UNITED WAY MISSION

United Way improves lives by mobilizing the caring power of communities around the world to advance the common good.

To do this we will...

- Ignite a worldwide social movement, and thereby mobilize millions to action – to give, advocate and volunteer to improve the conditions in which they live.
- Galvanize and connect all sectors of society – individuals, businesses, nonprofit organizations and governments – to create long-term social change that produces well-educated, financially stable and healthy individuals and families.
- Raise, invest and leverage billions of funds annually in philanthropic contributions to create and support innovative programs and approaches to generate sustained impact in local communities.
- Hold ourselves accountable to this cause through our steadfast commitment to continually measure – in real terms – improvement in education, income and health.
THE UNITED WAY WORLDWIDE MOVEMENT

UNITED WAY, the world’s largest privately-supported nonprofit organization, is a worldwide movement of nearly 1,800 community-based United Ways in 41 countries and territories. It advances the common good by focusing on education, income and health – the building blocks for a good quality of life. The United Way movement mobilizes millions to action – to give, advocate and volunteer – to improve conditions in their communities.

UNITED WAY WORLDWIDE is the leadership organization for the network of United Way Member Organizations around the world. These member organizations financially support the leadership organization through annual dues set according to membership accountability policies and agree to follow membership standards. Each United Way Member Organization is governed by a local board, with the authority to assess local community needs and set funding priorities accordingly. United Way Worldwide also supports the United Way network by protecting, strengthening and managing the United Way brand and by developing and delivering programs, strategies and learning opportunities that allow United Way Member Organizations to grow and drive lasting change in the communities they serve.
BRAND MANAGEMENT

United Way Worldwide creates and delivers the tools and resources that allow United Ways to provide a consistent brand experience around the world. Along with creative guidance, message research and communications strategies, an internal brand management website that provides guidelines, logos, templates and many other marketing, advertising and communications assets. Among assets are radio, TV and out-of-home collateral to facilitate easy local implementation of LIVE UNITED, United Way’s call-to-action and brand experience.

LIVE UNITED

LIVE UNITED is an invitation to advance the common good by focusing on education, income and health. More than 90 percent of United Ways use LIVE UNITED tools and resources, and the Ad Council and NFL have donated more than USD 135 million in media value since the launch of the LIVE UNITED campaign in 2008.

ONLINE ENGAGEMENT

United Way Worldwide deepens global relationships with supporters, stakeholders and partners by cultivating a rapidly growing network of social communities, email and mobile contacts and online donors. The web allows for the creation of stronger communities with greater opportunities for all. Online engagement encompasses: direct donor outreach – a call to give, advocate or volunteer; thanking and recognizing partners for their outstanding commitment to advancing the common good; and providing updates on how individuals and companies join United Way to improve the condition of all.
GLOBAL CORPORATE LEADERSHIP PROGRAM

The United Way Global Corporate Leadership program leverages the commitment and caring power of worldwide corporations with United Way’s ability to improve lives and create lasting change in communities. The Global Corporate Leadership program provides expert advice and manages relationships with companies, providing a strategic voice for the United Way network and opportunities to strengthen corporate philanthropic partnerships around the world. These 95 companies generate more than USD 1 billion annually in support for the United Way network. In 2013, the Global Corporate Leadership program raised USD 1.046 billion – a 1.0 percent increase – outpacing other campaigns.

WOMEN’S LEADERSHIP COUNCIL

United Way Women’s Leadership Councils mobilize the power of women to improve lives in our communities. A diverse network of more than 60,000 women in 156 communities, Women’s Leadership Councils can be found in six countries around the world (U.S., Canada, Jamaica, United Kingdom, Nigeria and Ghana). A dynamic force, led and supported by successful, purposeful women, Women’s Leadership Councils raised more than USD 188 million in 2013.

ENDOWMENT AND PLANNED GIVING

In 2013, United Way Endowments grew to more than USD 1.5 billion, unrealized deferred commitments grew to over USD 1.5 billion, and Planned Giving programs had a USD 85.7 million footprint. United Way Worldwide’s Endowment and Gift Planning Center helped create more than USD 9.8 million in current and deferred gifts through the Charitable Gift Annuity program, United Way Life service and United Way Worldwide’s Bequest Center.

INTERNATIONAL DONOR ADVISED GIVING (IDAG)

IDAG enables donors in the U.S.A. to give to charitable projects around the world. The IDAG team provides diligence vetting and oversight of international grants. United Ways, corporations and even individuals in the U.S.A. can complete their philanthropic portfolio by offering this service to donors who wish to give at least USD 5,000 to charitable organizations outside the U.S.A. More than USD 35 million is distributed annually through this program.

UNITED WAY TOCQUEVILLE SOCIETY

The United Way Tocqueville Society recognizes philanthropic leaders and volunteer champions around the world who have devoted time, talent and funds to create long-lasting changes by tackling our communities’ most serious issues. Hallmarks of the program are an awards program and gatherings and networking for Tocqueville Society members. In 2013, Tocqueville and Leadership giving grew to USD 1.286 billion. Tocqueville alone, showed an increase of 4.6 percent.
THANK YOU

UNITED WAY SENDS A SPECIAL THANKS TO ITS OUTSTANDING STRATEGIC PARTNERS WHO HAVE WORKED FOR MANY DECADES TO BUILD STRONGER COMMUNITIES WORLDWIDE

EVERY YEAR, UNITED WAY GLOBAL CORPORATE LEADERSHIP COMPANIES AND THEIR EMPLOYEES CONTRIBUTE MORE THAN $1 BILLION AND VOLUNTEER MORE THAN 23 MILLION HOURS – GIVING SELFLESSLY OF THEMSELVES TO IMPROVE THE LIVES OF OTHERS.

COMPANIES THAT RAISED $15 MILLION OR MORE

- Wells Fargo
- UPS*
- Microsoft Corporation
- Publix Super Markets
- AT&T
- IBM
- Bank of America
- GE
- ExxonMobil
- Intel Corporation
- Deloitte LLP
- Nationwide
- Costco Wholesale
- P&G
- PwC US
- Johnson & Johnson
- Target
- U.S. Bank

*First company to exceed giving $1 billion to United Way

LEARN MORE ABOUT HOW UNITED WAY WORKS WITH THESE COMPANIES TO IMPROVE LIVES AT UNITEDWAY.ORG/GCL
UNITED WAY DAY OF ACTION AND OTHER VOLUNTEER ENGAGEMENT PROGRAMS

A strategic volunteer program created to help advance the common good on issues of education, income and health, and deepen relationships with new and existing volunteers, United Way day of Action occurs annually on June 21. Resources available include activation toolkits, school supply drive project guides and annual reports. In 2013, 336 United Ways in 18 countries on six continents worked to harness the power of volunteers to positively change communities on United Way Day of Action. Our call for readers, tutors and mentors continued to grow and by the end of 2013 more than 270,000 people had pledged to volunteer.

STUDENT UNITED WAY AND ALTERNATIVE SPRING BREAK

The LIVE UNITED campaign comes to life on college and university campuses through Student United Ways and Alternative Spring Break. In 2013, there were 53 registered and active Student United Ways in 5 countries around the world, including the United States. Alternative Spring Breaks, a partnership with MTV and Deloitte, is a series of service immersion programs for college students, during their spring break, that deepen relationships and build trust with a new generation of supporters.

U.S. PUBLIC POLICY

United Way advocates for sound policies affecting education, income, health and the nonprofit sector’s capacity to advance the common good. The United Way Public Policy Agenda for the 113th U.S. Congress focuses on policy priorities including national leadership on protecting the Charitable Tax Deduction. United Way offers donors, volunteers, and advocates an opportunity to raise their voices on behalf of their community. In 2013, United Way Worldwide was active with the Charitable Tax Deduction, Earned Income Tax Credit (EITC), Elementary and Secondary Education Act (ESEA), Medicaid and the Children’s Health Insurance Program (CHIP), and other policies affecting our issue areas and the philanthropic sector.

LABOR LETTERS OF ENDORSEMENT PROGRAM

For nearly 70 years, United Way and the American Federation of Labor and the Congress of Industrial Organizations (AFL-CIO) have provided services to members of organized labor, their families and their communities. United Way’s longstanding relationship with organized labor helps to raise annual campaign support.
UNITED WAY AND NATIONAL FOOTBALL LEAGUE PARTNERSHIP

2013 marked the 40th anniversary of the partnership between the National Football League (NFL) and United Way – the longest running collaboration in history between a major sports league and a nonprofit organization. To celebrate the milestone, United Way teamed up again with NFL greats Franco Harris of the Pittsburgh Steelers and Roger Staubach of the Dallas Cowboys to lead the celebration. Both appeared in the first series of NFL-United Way PSAs back in 1974.

To engage fans in the celebration, the NFL and United Way joined forces with USA TODAY Sports to host a nationwide vote designed to identify the fan favorite NFL /United Way public service ad (PSA) of all time via the USA TODAY Ad Meter. Thousands joined them in the walk down memory lane for four weeks of voting on ads from the 1970s, 1980s, 1990s and 2000s. The 1999 PSA featuring former All-Pro Linebacker and Super Bowl Champion Derrick Brooks of the Tampa Bay Buccaneers was selected as the #1 fan favorite.

2013 was also the third and final year of United Way TEAM NFL – a core group of college-educated, civic-minded NFL players committed to working with United Way to recruit more volunteer readers, tutors and mentors. Throughout the year, NFL players mentored kids, led volunteer recruitment efforts, supported stadium sign-up activities, visited schools, hosted tweet ups and participated in Google hang-outs in an effort to reach their goals.

By the end of the football season, more than 39,000 people had signed up to volunteer through United Way TEAM NFL. In addition, players and teams reached more than 23 million people on Twitter, there were 265 million unique visitors to the United Way TEAM NFL site, and there were approximately 360 media mentions about the effort in outlets including the Wall Street Journal, Chicago Business Journal, Yahoo Finance, Business Wire, Morning Star, Philanthropy Journal and Univision – plus many local TV affiliates such as ABC, CBS, FOX and NBC (total earned media: approximately USD 2.45 million).
LEARNING OPPORTUNITIES

Providing a broad range of learning opportunities that allow local United Ways to succeed is an important function of United Way Worldwide. These learning opportunities give United Ways the ability to create connected strategic goals that enrich and maintain a consistent brand experience.

PROGRAMS, MEETINGS AND CONFERENCES

Learning programs span all United Way functions, including brand strategy and marketing, community engagement and impact strategies, organizational leadership and governance, public policy, resource development and relationship building. Conferences and regional meetings around the world, in-person courses and summits are some of the learning opportunities offered. A portion of each United Way’s membership investment (dues) is set aside as flexible training credits to offset the cost of training and professional development. An online United Way learning opportunities catalog has a full listing of offerings and how to use flexible training credits.

VIRTUAL TRAINERS AND WEBINARS

United Way Virtual Trainers and webinars are online and distance learning programs. They provide an opportunity for greater reach and increase the number of staff trained while avoiding travel costs and time out of the office. Weekly webinars are available for utilization by our worldwide network, are featured in “Breakfast with United Way” each day and indexed in the learning catalog. In 2013, United Way Worldwide presented more than 90 webinars.

TOOLKITS

United Way Worldwide creates toolkits and assists in the implementation of new strategies. They provide examples of forms and publications, along with best practices from other United Ways. In many cases, progress is tracked through conference and follow-up calls with users.

Examples of toolkits provided by United Way Worldwide include:

- Born Learning Business Communications and Engagement Toolkits
- Early Grade Reading Toolkit
- Out-of-School Time Toolkit
- Churn Tool and Matrix
- Retention and Loyalty Toolkit
LEARNING OPPORTUNITIES CONTINUED

ONLINE RESOURCES

United Way Online, United Way Worldwide’s extranet, is the main form of communication between United Way Worldwide and United Way Member Organizations. In 2013, the extranet saw a complete redesign focused on better leveraging the growing talent of our worldwide network by facilitating continuous learning, development and exchange. Additionally, the online talent recruitment platform posted nearly 800 positions for United Ways. Listservs provide real-time information sharing and assistance among network members.

Examples of resources available on United Way Online include:

EDUCATION

➤ Education Research Overview
➤ United Way’s Education Strategies: Improving Success for Children and Youth
➤ Research Supporting the Volunteer Call to Action
➤ Out-Of-School Time Issue Brief

INCOME

➤ United Way’s Income Strategies and Approaches
➤ Income Research Overview (in progress)
➤ Family-Sustaining Employment Research Brief
➤ Financial Stability Through Integrated Service Delivery: Highlights from the United Way Network

HEALTH

➤ United Way’s Health Strategies and Approaches
➤ Healthy Summers for Kids: Turning Risk into Opportunity
➤ Health Research Overview (in progress)
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*As of December 31, 2013
In 2013, the United Way network of nearly 1,800 United Ways raised USD 5.201 billion, making United Way the largest, privately-supported nonprofit in the world. The financial information below is for United Way Worldwide, located in Alexandria, Virginia, the leadership organization of the United Way network.

**Contributions** are funds donated to support United Way Worldwide’s mission and its programs that promote education, income and health. These funds consist of unrestricted, temporarily-restricted and permanently-restricted donations.

**Membership support** is received annually from United Way member organizations for continued membership in the United Way network. United Ways receive benefits of membership and comply with standards established by United Way Worldwide.

**Other revenue** includes income generated from the sale of promotional materials, program service fees, investment activity, conferences, rent and non-professional service, transaction fees and miscellaneous activity.

**Campaign efforts** include charitable funds raised from employees and companies through United Way campaigns at a group of participating companies whose employees live and/or work in the New York Tri-State region (United Way Worldwide manages United Way of the New York Tri-State region). The Tri-State regional office is responsible for collecting and distributing these campaign funds. Campaign efforts of New York Tri-state region including adjustments from prior campaigns resulting from the closure of Tri-state activities, and miscellaneous activity.

**FINANCIAL HIGHLIGHTS**

- **2013 United Way Worldwide Consolidated Revenue**
  - USD 80,661,000

- **2013 United Way Worldwide Consolidated Expenses**
  - USD 83,317,000

- **Contributions** 60%
- **Membership Support, Net** 36%
- **Other Revenue** 4%
- **Program Expenses** 82%
- **Non-Operating Expenses** 8%
- **General and Administrative** 7%
- **Fundraising** 3%


**General and Administrative** activities include finance, legal, IT and other services that support United Way Worldwide’s programs.

**Non-Operating Expenses** are pension-related changes.

**Fundraising** is responsible for United Way Worldwide fundraising efforts.
United Way Worldwide and Subsidiaries Condensed Consolidated Statements of Financial Position
As of December 31, 2013 (In USD Thousands)

<table>
<thead>
<tr>
<th></th>
<th>2013</th>
<th>2012</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Assets</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Current Assets</td>
<td>29,660</td>
<td>50,653</td>
</tr>
<tr>
<td>Noncurrent Assets</td>
<td>37,044</td>
<td>30,924</td>
</tr>
<tr>
<td>Total Assets</td>
<td>66,704</td>
<td>81,577</td>
</tr>
<tr>
<td><strong>Liabilities and Net Assets</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Liabilities</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Current Liabilities</td>
<td>20,543</td>
<td>23,233</td>
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<tr>
<td>Noncurrent Liabilities</td>
<td>9,316</td>
<td>18,843</td>
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<tr>
<td>Total Liabilities</td>
<td>29,859</td>
<td>42,076</td>
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<tr>
<td><strong>Net assets</strong></td>
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<tr>
<td>Unrestricted-Board designated</td>
<td>893</td>
<td>887</td>
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<tr>
<td>Temporarily restricted</td>
<td>8,799</td>
<td>15,924</td>
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<tr>
<td>Permanently restricted</td>
<td>3,791</td>
<td>3,790</td>
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<tr>
<td>Total net assets</td>
<td>36,845</td>
<td>39,501</td>
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<tr>
<td><strong>Total Liabilities and Net Assets</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>66,704</td>
<td>81,577</td>
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**Revenue**

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<thead>
<tr>
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<th>2013</th>
<th>2012</th>
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<tbody>
<tr>
<td>Membership Support, net</td>
<td>28,869</td>
<td>28,608</td>
</tr>
<tr>
<td>Campaign efforts, Tri-State, net*</td>
<td>0</td>
<td>7,507</td>
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<tr>
<td>Contributions</td>
<td>48,634</td>
<td>49,932</td>
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<tr>
<td>Other Revenue</td>
<td>3,158</td>
<td>9,485</td>
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<tr>
<td><strong>Total Revenue</strong></td>
<td>80,661</td>
<td>95,532</td>
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**Expenses**

**Program expenses:**

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<tr>
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<th>2012</th>
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</thead>
<tbody>
<tr>
<td>Investor Relations</td>
<td>6,552</td>
<td>39,333</td>
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<tr>
<td>International Donor Advised Giving</td>
<td>36,092</td>
<td>*</td>
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<tr>
<td>International Network</td>
<td>3,848</td>
<td>2,831</td>
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<tr>
<td>U.S. Network</td>
<td>8,765</td>
<td>*</td>
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<tr>
<td>Community Impact and Strategy</td>
<td>8,757</td>
<td>26,272</td>
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<tr>
<td>Learning, Coferencing and Talent Management</td>
<td>4,476</td>
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<td>Public Policy</td>
<td>0</td>
<td>1,029</td>
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<tr>
<td>Brand Strategy and Marketing</td>
<td>6,929</td>
<td>10,685</td>
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<tr>
<td>Campaign and Public Relations</td>
<td>5,739</td>
<td>4,888</td>
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<td>Promotional Material Sales</td>
<td>579</td>
<td>2,766</td>
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<tr>
<td><strong>Total Program Expenses</strong></td>
<td>81,737</td>
<td>87,804</td>
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**Support Services:**

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<tbody>
<tr>
<td>General and Administrative</td>
<td>5,790</td>
<td>7,188</td>
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<tr>
<td>Fundraising</td>
<td>2,392</td>
<td>2,364</td>
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<tr>
<td><strong>Total Support Services</strong></td>
<td>8,182</td>
<td>9,552</td>
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**Non-operating Adjustments to Net Assets**

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<tr>
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<th>2012</th>
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<tbody>
<tr>
<td>Change in Net Assets</td>
<td>(2,656)</td>
<td>894</td>
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<tr>
<td>Net Assets Beginning of the Year</td>
<td>39,501</td>
<td>38,607</td>
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<tr>
<td><strong>Net Assets End of the Year</strong></td>
<td>36,845</td>
<td>39,501</td>
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**Non-operating (Income) Expenses**

<table>
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<tr>
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<th>2013</th>
<th>2012</th>
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</thead>
<tbody>
<tr>
<td></td>
<td>(6,602)</td>
<td>(2,718)</td>
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</tbody>
</table>

*NOTE: We are including the campaign efforts of Tri-state in “Other Revenue” for 2013 as there were wind down activities that generated a loss, campaign efforts of New York Tri-state region including adjustments from prior campaigns resulting from the closure of Tri-state activities, and miscellaneous activity.

* These programs are new for 2013.