

2024 ANNUAL FINANCIAL OVERVIEW



UNITED WAY
Greater Milwaukee & Waukesha County

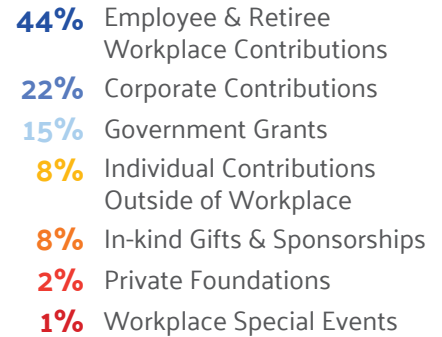
United Way of Greater Milwaukee & Waukesha County mobilizes people to action so that all can thrive.

In 2024-25, United Way is providing funding to:

- End family homelessness and support 25 programs through our Safe & Stable Homes Initiative.
- Help people start stable careers and support 16 programs through our Reducing Barriers to Employment & Advancement Initiative.
- Provide computers to people who need them through our Techquity Initiative.
- Provide services and support for nine local high schools through our Teen Mental Wellness: Empowering Minds Initiative.

Also in 2024-25, United Way is funding an additional 133 programs at 82 local nonprofits helping people live better lives.

2024 FUNDING SOURCES



PEOPLE SERVED IN OUR FOUR-COUNTY AREA



194,025
people

were served by United Way-funded programs and partnerships across our community last year.*

An additional 266,907 individuals were served by United Way funded partner IMPACT 211.



MILWAUKEE COUNTY
121,839



WAUKESHA COUNTY
20,820



OZAUKEE COUNTY
3,142



WASHINGTON COUNTY
2,547

*45,677 individuals who were served in our community did not provide a ZIP code at intake.

2024 BOARD OF DIRECTORS

Board Chair

George R. Oliver*
Johnson Controls

Immediate Past Chair

Donald W. Layden, Jr.*
Retired, NCR Corporation

Vice Chair

Blake D. Moret*
Rockwell Automation

Secretary

Kelly H. Grebe*
Community Leader

Treasurer

David Gay*
EY

United Way President & CEO

Amy L. Lindner*
United Way of Greater Milwaukee & Waukesha County

United Way Chief Operating Officer

Filippo Carini*
United Way of Greater Milwaukee & Waukesha County

David Bowles CMRignite

Bladen J. Burns Fiduciary Management, Inc.

Filippo Carini United Way of Greater Milwaukee & Waukesha County*

Sheldon Cuffie Cream City Cyber

Coreen Dicus-Johnson Network Health*

P.J. DiStefano Deloitte LLP

Michael R. Evans Marcus Hotels & Resorts

Pamela S. Fendt Milwaukee Area Labor Council, AFL-CIO*

John W. Florsheim Weyco Group, Inc.*

Cristy Garcia-Thomas

David Gay EY*

Cindy Gnadinger, Ed.D Carroll University

Linda Gorens-Levey General Capital Group

Kelly H. Grebe Community Leader

Nancy Hernandez ABRAZO Marketing/Hispanic Collaborative*

Bryan B. House Foley & Lardner LLP

Mark F. Irgens Irgens*

Daniel W. Jackson, FACHE Ascension

Jasmine M. Johnson Versiti Blood Center of Wisconsin

Rodney Jones-Tyson Baird

Craig Jorgensen VJS Construction Services*

Margaret C. Kelsey WEC Energy Group

John Kissinger GRAEF*

Heather Ladage Milwaukee Business Journal

Donald W. Layden, Jr. Retired, NCR Corporation*

Matthew S. Levatich Community Leader*

Amy Lindner United Way of Greater Milwaukee & Waukesha County*

Patrick Lubar Ixonia Bank

Earnell R. Lucas Fiserv

Samantha Maldonado Chaska Consulting

Derek Meyer Associated Bank

Blake D. Moret Rockwell Automation*

Wayne T. Morgan Retired, Baker Tilly Virchow Krause, LLP*

George R. Oliver Johnson Controls*

Dr. Keith P. Posley Community Leader

Jonas Prising ManpowerGroup

John R. Raymond, Sr., MD Medical College of Wisconsin

Stephanie Riesch-Knapp R&R Insurance Services, Inc.

Christopher Rowland Mitratch

Rachel Schneider Molson Coors Beverage Company

Josh Smith A. O. Smith Corporation

Judson M. Snyder BMO Financial Group*

Kimberly K. Stoll Badger Meter

Judith D. Taylor DUECO

Scott Turner Children's Wisconsin*

Mark Wallace Clarius

Peggy Williams-Smith Visit Milwaukee

Leslie Winger Aurora Health Care Foundation

DeVona Wright Cottrell GMR Marketing*

Katrene Zelenovskiy Quarles & Brady LLP

Sam Zielke Froedtert Health

*Executive Committee

STATEMENT OF ACTIVITIES

Year End June 30, 2024

Public Support & Revenue	Without Donor Restrictions	With Donor Restrictions	Total
Campaign Revenue			
Gross Campaign Results	\$41,898,128	\$14,934,498	\$56,832,626
Contributed Non-Financial Assets	670,662		670,662
Less: Donor Designated Funds	(22,269,400)	(1,311,296)	(23,580,696)
Net Campaign Results	20,299,390	13,623,202	33,922,592
Less: Provision for Uncollectible Pledges	(1,475,487)	(51,984)	(1,527,471)
Net Campaign Revenue	18,823,903	13,571,218	32,395,121
Contributions Received in Prior Period Now Released from Restriction	2,448,489	(2,448,489)	
Service Fees - Campaign	377,251		377,251
Sponsorship of United Way Events and Activities	933,725		933,725
Total Campaign Revenue	\$22,583,368	\$11,122,729	\$33,706,097
Non-campaign Revenue			
Dividends and Interest Income	\$1,206,297	\$78,340	\$1,284,637
Net Realized and Unrealized Gains (Losses) on Investments	1,441,001	398,267	1,839,268
Grants	4,380,233	(78,484)	4,301,749
Other Income	153,141		153,141
Release from Restrictions	7,027,664	(7,027,664)	
Total Noncampaign Revenue	\$14,208,336	\$(6,629,541)	\$7,578,795
Total Public Support and Revenue	\$36,791,704	\$4,493,188	\$41,284,892
Expenses			
Program Services			
Gross Program Investments	\$50,973,083	\$1,311,296	\$52,284,379
Less: Donor Designated Funds	(22,269,401)	(1,311,296)	(23,580,697)
Net Program Investments	28,703,682		28,703,682
Community Impact	1,904,050		1,904,050
Volunteer Engagement	1,054,032		1,054,032
Grants	1,274,650		1,274,650
Total Program Services	\$32,936,414		\$32,936,414
Supporting Services			
Fundraising	4,819,296		4,819,296
Management and General	2,656,571		2,656,571
Total Supporting Services	\$7,475,867		\$7,475,867
Total Expenses	\$40,412,281		\$40,412,281
Change in Net Assets	(3,620,577)	4,493,188	872,611
Net Assets at Beginning of Year	37,925,433	7,351,983	45,277,416
Net Assets at End of Year	\$34,304,856	\$11,845,171	\$46,150,027

STATEMENT OF FINANCIAL POSITION

Year End June 30, 2024

Current Assets	Liabilities and Net Assets
Current Assets	
Cash and Cash Equivalents	Donor Designations Payable
Investments	Amounts Payable Under Fiscal Agent Responsibilities
Pledges Receivable - Net	Other Amounts Payable
Grant Receivable	Accrued Expenses and Other Current Liabilities
Prepaid Expenses and Other	457(b) Plan Participant Liability
Total Current Assets	Funds Held as a Fiscal Agent - (Non-Campaign)
Investments - Endowment Fund	Operating Lease Liability
457(b) Plan Participant Assets	Total Current Liabilities
Beneficial Interest in Endowment Held by Others	Long-Term Portion of Operating Lease Liability
Funds Held as a Fiscal Agent - (Non-Campaign)	Total Liabilities
Long-Term Pledges Receivable - net	Net Assets
Right-Of-Use Assets - Operating, net	Undesignated
Land, Building, and Equipment - Net	Investment in Land, Building, and Equipment
Total Assets	Board-Designated for Programs and Initiative Funding
	Board-Designated Endowment Fund
	Board-Designated Short Term Community Investments
	Waukesha Property Endowment
	Total Without Donor Restrictions
	With Donor Restrictions
	Total Net Assets
	Total Liabilities and Net Assets



Mission: United Way of Greater Milwaukee & Waukesha County changes lives and improves our community by mobilizing people and resources to drive strategic impact in health, education, and financial stability.