

# 2025 ANNUAL FINANCIAL OVERVIEW



**UNITED WAY**  
Greater Milwaukee  
& Waukesha County

United Way of Greater Milwaukee & Waukesha County unites people to create positive lasting change in our community.

In 2025-26, United Way is:

- Supporting 18 programs to help individuals start stable careers through our Reducing Barriers to Employment & Advancement Initiative.
- Supporting 20 programs to keep families in their homes through our Safe & Stables Homes Initiative.
- Providing computers to people who need them through our Technology Initiative.
- Providing services and support to 16 local high schools through our Teen Mental Wellness: Empowering Minds Initiative.
- Investing in more than 150 local nonprofits helping people live better lives.

## 2025 FUNDING SOURCES



## PEOPLE SERVED IN OUR FOUR-COUNTY AREA



**192,430**  
people

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

An additional 235,876 individuals were served by United Way funded partner IMPACT 211.



**MILWAUKEE COUNTY**  
134,136



**WAUKESHA COUNTY**  
25,120



**OZAUKEE COUNTY**  
3,023



**WASHINGTON COUNTY**  
2,673

\*27,478 individuals who were served in our community did not provide a ZIP code at intake.

## 2025 BOARD OF DIRECTORS

### Board Chair

**George R. Oliver\***

Retired, Johnson Controls

### Immediate Past Chair

**Donald W. Layden, Jr.\***

Retired, NCR Corporation

### Vice Chair

**Blake D. Moret\***

Rockwell Automation

### Secretary

**Cristy Garcia-Thomas\***

Greater Milwaukee Committee

### Treasurer

**David Gay\***

EY

### United Way President & CEO

**Amy L. Lindner\***

United Way of Greater Milwaukee & Waukesha County

**JoAnne Anton** Herb Kohl Philanthropies

**Lindsey Ashenden** ManpowerGroup

**Kurt Bechthold** Walbec Group\*

**Steve Booth** Baird\*

**Becky Cameron Valcq** Alliant Energy

**Lee Anne N. Conta** von Briesen & Roper, s.c.

**Sheldon Cuffie** Cream City Cyber

**Coreen Dicus-Johnson** Network Health\*

**P.J. DiStefano** Deloitte LLP\*

**Kristin Dufek** Eppstein Uhen Architects, Inc. (EUA)

**Michael R. Evans** Marcus Hotels & Resorts

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

**Raquel Filmanowicz** VC 414\*

**Gabrielle Finley-Hazle** Aurora Health Care

**John W. Florsheim** Weyco Group, Inc.\*

**Becky Frankiewicz** ManpowerGroup

**Cristy Garcia-Thomas** Greater Milwaukee Committee\*

**David Gay** EY\*

**Cindy Gnadinger, Ed.D** Carroll University

**Linda Gorens-Levey** General Capital Group

**Kelly H. Grebe** Community Leader

**Steve Hannon** Landmark Credit Union

**Nancy Hernandez** ABRAZO Marketing/Hispanic Collective\*

**Bryan B. House** Foley & Lardner LLP

**Mark F. Irgens** Irgens\*

**Danel W. Jackson, FACHE** Ascension

**Rodney Jones-Tyson** Baird

**Craig Jorgensen** VJS Construction Services

**Margaret C. Kelsey** WEC Energy Group

**John Kissinger** GRAEF\*

**Heather Ladage** Milwaukee Business Journal

**Scott J. Lauber** WEC Energy Group\*

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

**Nicole Lecher** Northwestern Mutual

**Matthew S. Levatic** Community Leader\*

**Amy Lindner** United Way of Greater Milwaukee & Waukesha County\*

**Patrick Lubar** Ixonia Bank

**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** Retired, Johnson Controls\*

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

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

**Christopher Rowland** Mitrastech

**Rachel Schneider** Molson Coors Beverage Company

**Josh Smith** A. O. Smith Corporation

**Judson M. Synder** BMO Financial Group\*

**Kimberly K. Stoll** Badger Meter

**Judith D. Taylor** Journey21, Inc.\*

**Mark Wallace** Clarios

**Peggy Williams-Smith** Visit Milwaukee

**DeVona Wright Cottrell** GMR Marketing

**Katrene Zelenovskiy** Quarles & Brady LLP

\*Executive Committee

# STATEMENT OF ACTIVITIES

Year End June 30, 2025

Public Support & Revenue	Without Donor Restrictions	With Donor Restrictions	Total
<b>Campaign Revenue</b>			
Gross Campaign Results	\$37,917,632	\$9,629,226	\$47,546,858
Contributed Non-Financial Assets	795,619		795,619
Less: Donor Designated Funds	(18,180,721)	(851,020)	(19,031,741)
Net Campaign Results	20,532,530	8,778,206	29,310,736
Less: Provision for Uncollectible Pledges	(1,251,800)	(127,275)	(1,379,075)
Net Campaign Revenue	19,280,730	8,650,931	27,931,661
Contributions Received in Prior Period Now Released from Restriction	1,874,464	(1,874,464)	
Service Fees - Campaign	268,055		268,055
Sponsorship of United Way Events and Activities	945,163		945,163
<b>Total Campaign Revenue</b>	<b>\$22,368,412</b>	<b>\$6,776,467</b>	<b>\$29,144,879</b>
<b>Non-campaign Revenue</b>			
Dividends and Interest Income	\$1,108,602	\$88,202	\$1,196,804
Net Realized and Unrealized Gains (Losses) on Investments	842,003	304,139	1,146,142
Grants	1,772,314	7,370	1,779,684
Other Income	141,447		141,447
Release from Restrictions	7,365,567	(7,365,567)	
<b>Total Noncampaign Revenue</b>	<b>\$11,229,933</b>	<b>\$(6,965,856)</b>	<b>\$4,264,077</b>
<b>Total Public Support and Revenue</b>	<b>\$33,598,345</b>	<b>\$(189,389)</b>	<b>\$33,408,956</b>
<b>Expenses</b>			
<b>Program Services</b>			
Gross Program Investments	\$43,395,967	\$851,020	\$44,246,987
Less: Donor Designated Funds	(18,180,721)	(851,020)	(19,031,741)
Net Program Investments	25,215,246		25,215,246
Community Impact	1,857,451		1,857,451
Volunteer Engagement	1,129,386		1,129,386
Grants	957,328		957,328
<b>Total Program Services</b>	<b>\$29,159,411</b>		<b>\$29,159,411</b>
<b>Supporting Services</b>			
Fundraising	5,226,137		5,226,137
Management and General	2,745,235		2,745,235
<b>Total Supporting Services</b>	<b>\$7,971,372</b>		<b>\$7,971,372</b>
<b>Total Expenses</b>	<b>\$37,130,783</b>		<b>\$37,130,783</b>
Change in Net Assets	(3,532,438)	189,389	3,721,827
Net Assets at Beginning of Year	34,304,433	11,845,171	46,150,027
<b>Net Assets at End of Year</b>	<b>\$30,772,418</b>	<b>\$11,655,782</b>	<b>\$42,428,200</b>

# STATEMENT OF FINANCIAL POSITION

Year End June 30, 2025

Current Assets	Liabilities and Net Assets
<b>Current Assets</b>	
Cash and Cash Equivalents	Donor Designations Payable
\$6,557,633	\$2,246,765
Investments	Amounts Payable Under Fiscal Agent Responsibilities
14,640,158	1,125,522
Pledges Receivable - Net	Other Amounts Payable
7,110,977	596,327
Grant Receivable	Accrued Expenses and Other Current Liabilities
661,522	237,525
Prepaid Expenses and Other	457(b) Plan Participant Liability
155,275	171,696
<b>Total Current Assets</b>	Funds Held as a Fiscal Agent - (Non-Campaign)
<b>\$29,125,565</b>	3,938,789
Investments - Endowment Fund	Operating Lease Liability
\$13,339,005	20,588
457(b) Plan Participant Assets	<b>Total Current Liabilities</b>
171,696	<b>\$8,337,212</b>
Beneficial Interest in Endowment Held by Others	Long-Term Portion of Operating Lease Liability
171,696	14,817
Funds Held as a Fiscal Agent - (Non-Campaign)	<b>Total Liabilities</b>
3,938,789	<b>\$8,337,029</b>
Long-Term Pledges Receivable - net	<b>Net Assets</b>
1,864,436	Undesignated
Right-Of-Use Assets - Operating, net	\$1,993,489
34,859	Investment in Land, Building, and Equipment
Land, Building, and Equipment - Net	2,054,123
2,054,122	Board-Designated for Programs and Initiative Funding
<b>Total Assets</b>	17,085,239
<b>\$50,780,229</b>	Board-Designated Endowment Fund
	3,859,572
	Board-Designated Short Term Community Investments
	5,342,558
	Waukesha Property Endowment
	437,437
	<b>Total Without Donor Restrictions</b>
	<b>\$30,772,418</b>
	With Donor Restrictions
	\$11,655,782
	<b>Total Net Assets</b>
	<b>\$42,428,200</b>
	<b>Total Liabilities and Net Assets</b>
	<b>\$50,780,229</b>



**Mission:** We united people to create positive lasting change in our community.