



**greenwich**  
UNITED WAY  
Local Insights. Lasting Results.  
**CEO Board Report**  
**June 2019**  
**(May 16 – June 11)**

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### **FUND DEVELOPMENT & MARKETING**

- Follow-up phone calls continue to ~100 businesses mailed G UW info package.
- Regular meeting with Bazini / Hopp to discuss PR / marketing strategies.
- Individual meetings with ECAGS donors to give 1-year update continued.
- Held 6 prospective donor meetings.
- Attended *Building One Community* breakfast (Held in Stamford – they help many Greenwich residents that are immigrants).
- Attended networking event hosted by K Investments (Greenwich-based real estate investment firm).

### **BOARD MANAGEMENT AND DEVELOPMENT**

- Met with prospective new board member.
- Held preliminary budget board calls to discuss 2019 / 2020 budget.
- Participated in Nominating Committee meeting.
- Attended and participated in Advisory Board meeting.

### **EXTERNAL OPERATIONS**

- Met with 2 agencies to discuss programs.
- Met with Ralph Mayo (interim superintendent of Greenwich Public Schools) to review data requests for ECAGS.
- Attended and spoke at Reading Champions ceremony at Boys & Girls Club.
- Attended and participated in GJrUW “Together We Shine” (red-carpet event for Abilis clients).

### **INTERNAL OPERATIONS**

- Our regular monthly meeting was held with DeCruze to discuss G UW financials.
- Met with O’Connor Davies to began work on audited financials.
- Held and participated in CEO Roundtable (3x/year here at G UW).

### **CORE FUNCTIONS**

- Expenses continue to be under budget (see financials)
- Developed and reviewed with Finance Committee and Board preliminary 2019 – 2020 budget.
- Led Grants Committee discussions on extension grant process.