



# AGENDA

## Meeting #6 Saturday, October 5, 2019

**Tripp Scott Law Offices**  
**110 SE Sixth Street, Suite 1500, Fort Lauderdale, FL 33301**

*Direction Link: [Tripp Scott, P.A.](#)*

### **Parking**

*Please park in the six story lot behind the law firm's office building located on SE 6<sup>th</sup> Court which is on the south side of the office building (the main building address is 110 SE 6<sup>th</sup> Street), bring your parking tickets with you. You will be escorted to the meeting from the building lobby.*

### **Mission**

*Empowering immigrants and others to become self-sufficient, productive and civically engaged.*

# 2019 HUF BOARD RETREAT

## Saturday, October 5, 2019

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### Agenda

- 8:00-8:30AM**      **Breakfast, Coffee, and Friendship**
- 8:30-8:45AM**      **Welcome** - Chuck Tatelbaum  
**Goals for the Day** – Willy Gomez  
**Update from 2018 Retreat: HUF Marketing** – Willy Gomez
- 8:45-9:00AM**      **Lucia Rodriguez** – My Vision as incoming Chair
- 9:00-9:45AM**      **Mission Moment: Values & Program**  
**Values Revisited** – Josie Bacallao  
**Program Update** – Felipe Pinzon
- 9:45-10AM**      **Brief Break**
- 10AM- 11AM**      **Our Individual Paths to HUF's Mission**
- 11AM-11:15AM**      **Brief Break**
- 11:15-12:15**      **Committee Presentations** (begin – see presentation order below)
- 12:15-12:30PM**      **Break and Self-Serve Lunch**
- 12:30 – 2:15PM**      **Working Lunch & Committee Presentations Continued**
- **Program Committee** - Steve Sampier
  - **Finance & Operations** - Committee Emma Pfister
  - **Public Policy & Advocacy Committee** – Dan Schevis/  
Dr. Rolando Garcia
  - **Governance Committee** – Steve Sampier
  - **Development Committee** – Willy Gomez
  - **Marketing Committee** – Lucia Rodriguez

- a. ***What does your committee or the agency need to be doing different? Do we have the tools needed to be successful?***
  
- b. ***What should the committee/agency be considering?***
  
- c. ***What does the committee need from the board (please keep this strategic)? What do we need to support HUF's work?***

**2:15-2:30PM      Break**

**2:30-2:40PM      Wrap-Up - Facilitated by Willy Gomez  
Closing Remarks: Chuck Tatelbaum**

**2:40-3:00PM      Board Meeting**

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***Attachments FOR BACKGROUND INFORMATION ONLY***

- ***2018 Retreat Next Steps and Update*** *pgs. 1-2*
- ***Values Revisited*** *pgs. 3*
- ***Updated Strategic Plan – Action Items*** *pgs. 4-16*
- ***HUF 2018 Annual Report*** *pgs. 17-24*
- ***Board Member Scorecard through May 1*** *pgs. 25-28*

## Update on May 4, 2019

May 19, 2018  
Hispanic Unity of Florida  
Board Retreat

### Topline Next Steps

1. **Revisit strategic plan.** Re-prioritize the plan.  
**Next Step:** Chuck is coordinating an August or September meeting with the executive committee at HUF to discuss how to proceed updating the strategic plan.

Update: Refreshing during May 2019 Board Retreat

2. **Committee Meeting Report-Outs:** Recommend increasing the reporting of HUF committee work to the board – beyond what the committee minutes which are distributed with each board package. Group wanted to more information on action taken and what decisions were made.  
**Next Step:** Chuck will speak all committee chairs on how to best handle.

Update: Added to board meeting agendas

3. **Expand board meetings to three hours**  
**Next Step:** To be discussed at the June 2018 board meeting. Decide IF proceeding with three hour meetings; decide times – two options discussed - 3-6pm or 4-7pm, when these will begin and what will be on the agenda.

Update: Board agreed to expand meetings *when necessary*.

4. **Board Recruitment**  
**Next Step:** Chuck calling Hector Lima about leading an expanded Governance Committee in brainstorming ideas on board recruitment. The goal is to identify who HUF needs and wants on the board and a plan to recruit these individuals. Hector will work with Steve Sampier and the governance committee to create a plan for board discussion and approval. Once finalized the governance committee will continue to coordinate board member recruitment.

This group also will create an outline of how HUF should handle Miami recruitment. Should HUF create a separate “advisory” group or recruit to main HUF board?

(Any changes to the strategic plan goals will inform and impact board recruitment.)

Update: Hector Lima & Steve Sampier created plan and being implemented.  
Immediate needs: Technology & Accounting expertise

**Other:**

- 5. Making Miami Connections:** Hector Lima offered his home for an event.  
Timeframe: after 4Q 2018.

Update: On HUF's list of potential venues. Will explore if appropriate when HUF has deeper programming in Miami.

- 6. Cash Flow forecast** – John Guerrero asked if HUF could provide projected cash flow information. Virginia will begin providing to the finance committee and the board. (She and Prasad track cash flow on a daily basis.)

Update: Virginia and new CFO will begin providing later in 2019 on a monthly basis.

- 7. Planned Giving** – Mariaelena Ferrer will provide more information on “how to” to HUF in the future.

Update: Will implement wording in all future donor correspondence in 2019 and implement more robust plan in 2020.



# Values

Our values serve as a compass for our actions by Staff, Board of Directors and Volunteers.

- **People first.**

  - ***Respect & Dignity***

  - We treat everyone as a worthy individual whose experience, point of view and defining factors are acknowledged, accepted and valued.

- **We are transparent.**

  - ***Integrity & Transparency***

  - We are accountable for the highest standards of behavior and will act with integrity, fairness and openness in all our dealings.

- **We keep our promises to others and each other.**

  - ***Accountability***

  - We are committed to using our resources efficiently, achieving measurable results and readily communicating with employees, the community, clients, supporters and partners.

- **Diversity is a strength. Equity & Inclusion must be intentional.**

  - ***Diversity, Inclusion and Cultural Awareness***

  - We are committed to embracing diversity, cultural awareness and non-discrimination. This promise is made to ensure that the message of acceptance and tolerance is expressed in everything we say *and do*.

- **Entrepreneurial and calculated Risk-takers.**

  - ***Commitment to Excellence***

  - We are committed to providing the highest standards of service and conducting business with integrity fiduciary responsibility.

- **Together: a “force for good.”**

  - ***Collaboration and Teamwork***

  - We embrace the power of working together for a common purpose and greater good.

Item #	Committees	Status	Program Action Items - 2016-2020 Strategic Plan	Responsible	2016	2017	2018	2019	2020	Comments
1	Program	In Progress	Research, develop and write a Theory of Change	SVP						
2	Program	In Progress	Create a programmatic decision tool to analyze the degree to which a new program aligns with the Mission.	SVP						
3	Program	Completed	Identify Broward County High Schools with a large number of immigrant students	SVP						
4	Program	Completed	Meet with Children's Services Council, Chief Program Officer to share HUF's intent and discuss funding opportunities to serve high schools with a large number of immigrant students (requires an advocacy plan)	SVP						Several meetings have already taken place
5	Program	In Progress	Apply for funding to serve high schools with a large number of immigrant students	SVP						REF will be released in 2020
6	Program	In Progress	Create a detailed plan to ensure all immigrants have access to all HUF programs and services (U4K, Citizenship, ESOL, EE, etc.)	SVP						USCIS approved expansion for Haitian-Creole Speakers for Citizenship
7	Program		<i>Above Plan will include a cost-benefits analysis for current programs serving predominantly Hispanics</i>	SVP & CFO						
8	Program	Completed	Services gaps: Identify service gaps in all core service areas	SVP						
9	Program	Completed	Services gaps: Prioritize service gaps	SVP						
10	Program	Completed	Services gaps: Create a plan to address services gaps	SVP						
	Program	In Progress	Strengthen/redesign/customize financial stability services (ESOL, workforce & entrepreneurship)	SVP and Directors						
	Program		Secure resources and launch a Voter Registration and GOTV (get out the vote) campaign in preparation for 2020 elections	Senior Management						
	Program	Completed	Launched 2Gen approach	Directors						

Item #	Committees	Status	Program Action Items - 2016-2020 Strategic Plan	Responsible	2016	2017	2018	2019	2020	Comments
	Program	In Progress	Expand 2Gen approach	Directors						
	Program	In Progress	Consolidate case management, counseling and coaching services	Directors						
	Program	In Progress	Adopt the Family-Centered Coaching model	Directors						
11	Program	In Progress	Services gaps: Secure funding / establish new partner to address services gaps	SVP						
12	Program	Completed	Identify and secure school district data to determine Broward County area where there are large concentration of low-income immigrant families	SVP						
#REF!	Program	Completed	Identify service gaps in areas where low-income immigrants family live and work	Associate Prog Dirs						
#REF!	Program	In Progress	Create a plan to address service gaps in (identify potential government and foundation funding and key partners)	SVP						
	Program	New 2019	Create a plan to strengthen HUF's Performance Management System (database system, staff training, hire a data management staffer, etc.)	SVP						
	Color Key									
	Completed									
	In Progress									
	Not Started Or Stalled									



Item #	Committees	Status	Finance & Operations & Risk Management Action Items - 2016-2020 Strategic Plan	Responsible	2016	2017	2018	2019	2020
1	Finance & Operations & Risk Management	COMPLETED	Create a plan to grow HUF's fundraising capacity so that the agency can increase its mission capacity by adding key revenue-generating personnel (in Development & Programs).	CEO					
2	Finance & Operations & Risk Management	COMPLETED	Leverage HUF's real estate assets by refinancing current debt (\$330K) and extract \$500K in equity for operating reserve (\$150K) and funding of Development, Finance and Program personnel (\$350K).						
3	Finance & Operations & Risk Management	Ongoing	Maintain and utilize the comprehensive financial model developed as part of the Strategic Planning process. (VC created simpler version - to launch with new CFO.)						
4	Finance & Operations & Risk Management	Ongoing	Create a plan to grow HUF's reserves to \$1M in five years (PLACEHOLDER). **Number will reflect fixed costs ONLY.						
5	Finance & Operations & Risk Management	COMPLETED	Use \$150k of refinance for operating reserve.						
6	Finance & Operations & Risk Management	Ongoing	Develop EASY to read Monthly Dashboard with metrics for Finance/Programs and Development						
7	Finance & Operations & Risk Management	COMPLETED	Review HUF's usage of real estate assets to determine if HUF is able to better leverage this asset and a strong revenue stream for the agency						

Item #	Committees	Status	Finance & Operations & Risk Management Action Items - 2016-2020 Strategic Plan					
			Responsible	2016	2017	2018	2019	2020
8	Finance & Operations & Risk Management	Added 2019	Increase operational reserves fund to meet the increased costs of managing four vs two facilities. Increase from \$36 in reserves per year to \$____ (VC to provide), per year.					
9	Finance & Operations & Risk Management	Added 2019	Create HUF investment policy and invest HUF reserves to maximize growth while still allowing for flexibility.					
10	Finance & Operations & Risk Management	Added 2019	Reorganize the finance area to provide more support for the growing program & organizational needs. And, to provide greater support to the COO. Add CFO & Operations/Risk, Associate Director positions.					
11	Finance & Operations & Risk Management	Added 2019	Create and execute plan to strengthen operations: facilities & technology to support the growing needs of the agency & HUF management team. (Growth has outstripped our capacity in both of these areas.)					
12	Finance & Operations & Risk Management	Added 2019	Review HUF's HR support and develop short & long-term plans to provide more support for growing HR needs (management + team members).					
13	Finance & Operations & Risk Management	Added 2019	Identify HUF's 4-9 top processes and create a timeline to review and revise each. Implement new processes & procedures.					
Color Key								
Completed								
In Progress								
Not Started Or Stalled								

Item #	Committees	Status	Public Policy & Action Items - 2016-2020 Strategic Plan	Responsible	2016	2017	2018	2019	2020
1	Public Policy & Advocacy		Research how other not-for-profit organizations fund their Public Policy & Advocacy (PP&A) work and identify local and national potential funders to fund HUF's work						
2	Public Policy & Advocacy		Work with HUF staff to secure sustainable funding for a high-level PP&A Director position						
3	Public Policy & Advocacy		Create annual plans that establish HUF's PP&A priorities which support HUF's mission and program areas to include - economic development/workforce, education, social justice and citizenship/civic engagement						
4	Public Policy & Advocacy		Work with the marketing committee to develop a plan to: 1. Highlight HUF's work in key program areas; 2. Promote HUF research on issues which then positions the agency as "thought leaders" and advances HUF's advocacy work in these issue areas; 3. Support CEO in outreach & messaging to elected officials	PP&A Chairs with Marketing Chair + CEO					
5	Public Policy & Advocacy		Build a formal advocacy network of peer organizations (local and throughout the state) to advance each others' work. Identify the groups. Create formal MOU's which outline working relationship/partnership.						
6	Public Policy & Advocacy		Recruit board member(s) with public policy and/or advocacy expertise.	PP&A Chairs with Governance Committee					
7	Public Policy & Advocacy		Research other organizations/individuals who have expertise in PP&A to share their expertise with PP&A committee during workshops						
8	Public Policy & Advocacy		Create a PP&A Policy to guide the work of the PP&A committee and the board (Use United Way's Policy as a guide)						
<b>Color Key</b>									
Completed									
In Progress									
Not Started Or Stalled									

Item #	Committees	Status	Public Policy & Action Items - 2016-2020 Strategic Plan	Responsible	2016	2017	2018	2019	2020
			<b>PP&amp;A Projects and Issue focus for 2019-2020</b>	<b>Cost</b>	<b>Impact</b>				
	Public Policy & Advocacy		<b>Immigration Clinics</b> - six Broward Clinics in partnership with AIJ & CCLS	\$4.5K	300 clients				
	Public Policy & Advocacy		<b>VITA Champions</b> (free tax) efforts - focused on 10-12 top cities in Broward County - recruit and SM posts & visits at each city ( <b>Marketing Committee Support</b> )	\$12K	6,000 clients				
	Public Policy & Advocacy		<b>2020 Census</b> - Lead Cultural & Ethnic Subcommittee + Lead HUF efforts	\$27K-\$46K	\$2K x 15K clients x 10 years in federal funds for the county				
	Public Policy & Advocacy		<b>Children of Immigrant Families Coalition</b> and Website (Hold 2-4 annual meetings with this coalition and update website )	\$600-\$1200	Help strengthen & expand PP&A peer network (HUF goal)				
	Public Policy & Advocacy		<b>Visit with state &amp; congressional electeds</b> during two trips to Tallahassee (session kick-off and during budget session) as well as, visit with South Florida congressional members in DC (UnidosUS March meeting) as well as at their district offices	\$15K	Establish public policy priorities for immigrant community in Broward/ Establish HUF as PP "player" and "actor"				
	Public Policy & Advocacy	HOLD - Unless identify BOTH Partners & Funding	<b>Voter Registration</b> in 2020 during election season	\$25K for Staffer					
	Public Policy & Advocacy	HOLD - Unless identify BOTH Partners & Funding	<b>GOTV</b> (Get Out the Vote)	\$25K for Staffer					
			<b>HUF will identify the investment required for each (costs + staff time) for each of these projects/ issues</b>						
			<b>HUF also will identify the outcomes/results for each of these</b>						

Item #	Committees	Status	Public Policy & Action Items - 2016-2020 Strategic Plan	Responsible	2016	2017	2018	2019	2020
			<b>Parking Lot beyond 2020</b>						
	Public Policy & Advocacy	Parking Lot	Create a Grasstops & Grassroots advocacy networks with advocacy "trees" which identify the interests of the individuals/groups and their connections to elected officials and/or advocacy networks						
	Public Policy & Advocacy	Parking Lot	Develop expertise in researching public policy issues and the creation of policy papers or white papers						
	Public Policy & Advocacy	Parking Lot	Explore the purchase and use of lobbying tools such as "Lobby Tools"						
	Public Policy & Advocacy	Parking Lot	Create process to research opposing points of view and create messaging which provide counter point of view and/or clarifies and promotes facts						

Goal #	Committees	Status	Governance Action Items - 2016-2020 Strategic Plan	Responsible	2016	2017	2018	2019	2020
1	Governance	Completed - Exhibit 1	Recruitment: Develop a HUF Introduction Board Candidate Form which will provide the necessary information to do the research on names forwarded for Board candidacy. This form can further be used to capture names for committee membership or donor development.	Angie Stone	█				
2	Governance	Completed - Exhibit 2	Recruitment: A flow chart outline process – and who is responsible with timelines - and follow up process will also be developed for all candidates.	Angie Stone	█				
3	Governance	Completed - Exhibit 3	Recruitment: Finalize board recruitment process from exploratory to getting to know individual – to pre-qualifying individual and materials to be used to sell HUF	Angie Stone				█	
4	Governance		Recruitment: Build candidate file: minimum two candidates for every open position	Governance Chair	█	█	█	█	█
5	Governance		Recruitment: Invite past HUF Board Officers to join Governance Committee to assist with prospect interviews and vetting	Angie Stone			█		
6	Governance		Recruitment: Create a new support group consisting of past Board members, donors and long term supporters to assist HUF with identifying board members, committee members and donor prospects	Maria Elena Ferrer		█	█	█	█
7	Governance	New Package Completed - Mentoring has NOT	Onboarding & Ongoing Education: Revise new Board Member Orientation: Create overall agency information package, in-depth agency program tour and <b>implement board mentoring program</b>	Barbarra Grevior	█	█	█		

Gbal #	Committees	Status	Governance Action Items - 2016-2020 Strategic Plan	Responsible	2016	2017	2018	2019	2020
8	Governance	Completed Process & Utilizing	Engagement: Develop process to create more strategic agendas for the board's monthly meetings (15-30 minutes discussions). Explore inviting subject matter experts 3-4 times per year. Create a calendar of topics for every board meeting.	CEO + Boad Chair + Gov Chair					
9	Governance	Completed	Accountability: Revise Board member scorecard and review quarterly- MONTHLY will be sent to Board Chair who will forward to Board Members						
10	Governance	Completed Process	Accountability: Conduct annual board and individual board member assessments (create process & assign responsibility)	Governance Chair					
11	Governance	Completed	Review and finalize current CEO Succession plan						
12	Governance	Completed	Share and review the CEO succession plan DRAFT with the board of directors for final approval						
13	Governance	Completed	Development plans for VP Program and Development Director	CEO					
14	Moved from Development		Tools & Resources: Every Board Member to participate in 2-hour program in-depth orientation during every of their 3 terms (3 times total during six year term)	Governance Chair					
15	Moved from Development		Tools & Resources: Determine process to train new board members on development and provide on-going refresher information (research "best in class" nationally)	Governance Chair + Board Chair					
16	Governance	Added 2019	Update HUF Board Officer Job descriptions with new or updated duties						
17	Governance	Added 2019	Create on-boarding process for officers (conduct onboarding process annually with officer group)						
18	Governance	Added 2019	Succession plan for both Board Officers and Committee Chairs					Ongoing	
Color Key									
	Completed								
	In Progress								
	Not Started Or Stalled								

Item #	Committees	Status	Development Action Items - 2016-2020 Strategic Plan	Responsible	2016	2017	2018	2019	2020
1	Board Chair		Onboarding: Finalize toolkit and train all board members in first year and schedule annual refresher for existing board members (add to New Board Member on-boarding training)  <i>Set up Annual board training schedule and process</i>	Board Chair + Gov. Chair + CEO + Development Director					
2	Development - Committee with Staff	Completed for 2016	Goal Setting: Create individual development goals (part of larger board member commitment scorecard) – Work with Governance Committee to finalize						
3	Development HUF STAFF	ONGOIN	Goal Setting: Chair to meet annually with finance committee to set overall goals and then meet to create board member commitments with every member <b>(Recommendation: \$125K by 2020 from \$90K base in 2016 in pledges- 30% increase)</b>						
4	Development-Move to Governance	Completed	Tools & Resources: Every Board Member to participate in 2-hour program in-depth orientation during every of their 3 terms (3 times total during six year term)						
5	Development-Move to Governance		Tools & Resources: Determine process to train new board members on development and provide on-going refresher information (research “best in class” nationally)	Governance Chair + Board Chair + Development Director					
6	Development Committee & HUF Staff		Tools & Resources: Review HUF development materials and agree on the “tool kit” to be provided to the board members	Development Committee & HUF Staff					
7	Board Chair		Tools & Resources: Check-in with Board Members <b>Semi-Annually</b> on their development goals and address challenges – involve development committee board members for assistance	Board Chair + Gov. Chair					
8	Development - HUF STAFF	Completed	Accountability: Calendar quarterly development goals review						



Item #	Committees	Status	Development Action Items - 2016-2020 Strategic Plan	Responsible	2016	2017	2018	2019	2020
9	Development - HUF STAFF	Completed	Update job description and review with HUF team and Development Committee co-chairs						
10	Development - HUF STAFF	Completed	Secure consultant proposals and select consultants						
11	Development - HUF STAFF	Completed	Create hiring plan including documents to be used, outlets where position will be advertised, individuals with whom position opening will be shared and interview to hiring process, other screening tools, background check and negotiation process						
12	Development - HUF STAFF	Completed	Create on-board orientation for VP Development within HUF and with board members						
13	Development - HUF STAFF	Completed	Create ongoing (weekly, monthly) training/support for VP/Development with CEO and other key development team members						
14	Development - HUF STAFF	Completed	Create greet & meet annual calendar for VP/Development and board members and HUF funders						
15	Development - HUF STAFF	Completed	Create plan for community outreach for prospecting						
17	Board Chair		Accountability: Review & Report quarterly to the board on board over-all fundraising performance including plan on how to continue momentum or correct direction	Board Chair					
18	Board Chair	Added 2019	Board Chair to work with an "ad hoc" Development Task Force to create an annual plan to focus the board members on specific board development activities such as an annual Circle of Friends effort (ideally with a match from board members or a donor; End of Year Campaign; Annual Open House; Annual Coff Thank you Event; other pre-planned development activities)	Board Chair + Gov. Chair					
	Color Key								
	Completed								
	In Progress								
	Not Started Or Stalled								

Item #	Committees	Status	Marketing Action Items - 2016-2020 Strategic Plan	Responsible	2016	2017	2018	2019	2020
1	Marketing	Completed	Branding: Conduct Research among KEY HUF stakeholders including board of directors, employees, clients, donors/funders and potential donors/funders)						
2	Marketing	Completed	Prepare document to present to potential funders to support the research and marketing implementation of the project						
3	Marketing	Completed	Create 35 <sup>th</sup> Anniversary plan to celebrate HUF anniversary						
4	Marketing	Completed	Implement Messaging Campaign to brand name decision. Plan will include brand and messaging training of staff and board						
5	Marketing	New	Recruitment: Relaunch Marketing Committee with a renewed focus and approach to support organization's current needs						
6	Marketing	In Progress	Create & Implement a comprehensive Marketing Plan + Communications Plan to refresh HUF Brand						
7	Marketing	New	Create Brand Guidelines Manual. Train staff and board on usage						
8	Marketing	New	Refresh messaging and conduct messaging and elevator pitch for Board, leaders and staff						
9	Marketing	New	Refresh branding messaging and increase storytelling of HUF and its mission						
10	Marketing	New	Conduct brand inventory (all items which will need to be changed)						

Item #	Committees	Status	Marketing Action Items - 2016-2020 Strategic Plan	Responsible	2016	2017	2018	2019	2020
11	Marketing	New	Communications: Secure PR Agency (pro bono) to develop comprehensive Communications Plan						
12	Marketing	New	Position the agency as a subject matter expert of the two-generation (2Gen) approach, small business and citizenship program by sharing and co-writing white papers, blogs, and other authoritative publications						
13	Marketing	Ongoing	Support Public Policy & Advocacy Efforts with messaging to reinforce & increase reach of elected officials (Using RiseAbove, VPSA tools (Values, Problem, Solution & Action) template						
14	Marketing	Completed	Revisit branding decision on retaining name. What are the results of the use of HUF? Can we fund research and marketing if we pursue name change?						
Color Key									
Completed									
In Progress									
Not Started Or Stalled									



## Annual Report 2018

**Brief Background, Agency Description and Scope of Services** Our country is a beacon of freedom and opportunity. We consider Hispanic Unity of Florida, Inc. (HUF) the southern outpost of Ellis Island. Welcoming newcomers to our country and guiding them on their often difficult, but always hopeful, life-long process of learning what it means to be an American is at the heart of our work.

Hispanic Unity of Florida was originally founded in 1982 by community leaders to guide these aspiring Americans on their journey to their American dream and to ease the acculturation process. Today, HUF is Broward County's largest 501(c) (3) dedicated to the immigrant population. For 37 years, this agency has left an indelible mark on the more than 430,000 individuals and families served, and continues to deliver on its mission of: *Empowering immigrants and others to become self-sufficient, productive and civically engaged.*

With 12 programs and more than 30 services offered in 4 languages, this agency is able to serve South Florida's diverse community. Two-thirds of HUF's clients hail from Latin nations and the Caribbean, complemented by American-born clients including African-Americans, Caucasians and others.

In 2018, the agency served more than 15,000 children and families. HUF offers assistance at three main office locations and provides extended services at 50+ outreach locations. The agency focused on three major areas: **Language & Education, Economic Mobility & Entrepreneurship, and Citizenship & Civic Engagement** and also provided services in the areas of **Health & Well Being, Equal Treatment & Opportunity** and **Advocacy**.

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### **OVERALL HIGHLIGHTS: 2018**

#### **Economic Mobility & Entrepreneurship**

Closing the financial gap among our clients is one of our agency's major focus areas. And in 2018, we **served 11,738 individuals** to increase their knowledge about financial matters as well as, provide resources and create new habits – such as budgeting and savings – which will ultimately help them achieve greater self-sufficiency and grow assets. Below is a breakdown of the services and number of clients assisted.

**Center for Working Families (CWF)**– During 2018, the CWF program assisted a total of **417** participants.

## **Workforce Development**

- **70% of participants acquired employment** or a better job (goal 60%)
- **77% retained their employment** for a minimum of three months (goal 35%)
- Expansion of Bridge Program to include Patient Care Technician (PCT) career pathways
  - **55% of the students who were graduated from the Customer Service and Sales Training have acquired a national certification**
  - **2 students received the PCT** credential in December 2018

## **Income Support:**

**4,462** clients received

- Access to food – Comprando Rico y Sano served 2,800 participants. 1,804 SNAP applications were completed, impacting more than **3,600 individuals**. We conducted grocery tours, cooking demonstrations, “charlas” on healthy eating and nutrition classes.
- Access to Health – Te Ayudo served a total of **1,662** family members
  - **339** families were determined eligible for free or low-cost healthcare, which translates to **867** family members with access to health insurance
    - 56% enrolled in ACA plans
    - 42% enrolled in Medicaid plans
    - 1% enrolled in KidCare plan
  - With an average of \$9,864 in annual tax credits per household, the 339 individuals who signed up for ACA **received more than \$1.8 million dollars in health care premium savings per year!**
  - **272** families or 84% established a primary care doctor of their choice after receiving case management services from HUF Health Navigators.

**Volunteer Income Tax Assistance (VITA)** – During the 2018 tax season, more than 80 volunteers and 35 VITA staff completed **6,011 tax returns resulting in \$6.3 million in tax refunds, as well as \$1.5 million in savings in tax preparation fees, a big total of \$7.8 million in economic impact in Broward County**. The Broward VITA Coalition’s combined **E-file acceptance rate continued at 98%**, which exceeded the goal by 8% (goal 90%) for all tax returns transmitted to the IRS.

- HUF and Community Access Center (**CAC**) (serving the Haitian community) continued a very successful partnership as the two VITA providers with the Broward VITA Coalition (BVC) delivering tax services – through a partnership network of 40+ partners - at **16 VITA** site locations across Broward County as well as **25+ mobile sites**.
- VITA volunteers contributed a total of **3,237 hours** during the tax season
- The VITA Program successfully continued serving the program’s secondary focus, specifically, providing services to limited English speakers. We accomplished this goal through our experienced, multicultural staff and volunteer force in 5 languages (English, Spanish, Creole, Portuguese and American Sign Language).
  - **49 elected officials from 14 cities plus Broward County** became VITA Champions. They promoted the VITA program to residents in their respective communities. (**Public Policy & Advocacy**)
- The average Adjusted Gross Income (AGI) across the program was \$20,829. The program successfully served its target of low income families.
- According to the TaxSlayer report (6/4/2018) and IRS site database, this year, the BVC is the largest VITA provider in Broward County. The total tax refund amount for Broward County in 2018 was \$8,861,701 (**Our 40 partner coalition generated \$6.3M or 70% of total County impact**).
  - BVC sites: \$6,206,276 (**16 sites – 70% of total refund amount**)
  - IRS sites: \$1,094,019 (9 sites – 12% of total refund amount)
  - AARP sites: \$1,561,406 (11 sites – 18% of total refund amount)

**Disaster Case Management (DCM)** – DCM is a program that involves a disaster case manager and a disaster survivor to develop and carry out a disaster recovery plan. They assess a client’s verified disaster-caused unmet need and develop a goal-oriented plan that outlines steps to recovery. The program served **135** participants.

From the launch of the program in June 2018 through April 18th, 2019 the following impact has been made:

- 26 households have been approved for the Basic needs assistance of \$2,000 for a total of \$52,000
- 50 households have been approved for the Complex needs assistance of \$4,500 for a total of \$225,000
- Grand total economic/financial impact of **\$277,000 back to eligible individuals and households** in Broward County

**Financial Capability and Wealth Building** – **802** participants received services.

- CWF – a total of **288** participants attended the Financial Literacy workshops where they learned skills to achieve financial goals and improve their financial lives. **244** participants attended a financial coaching appointment where they developed financial plans, pulled credit reports, and learned how to make the right choice when choosing banking products, accepting a credit card offer and/or buying assets.
- Citizenship and Loan products program - During the integration of the citizenship and the financial capability programs in Miami, FinCap provided financial literacy classes to **320** participants. Out of that number, **166** clients made appointments with the financial coach to develop financial action plans, pull credit reports, and to learn how to make the right choice when choosing loan products to pay for their citizenship application.
- The NeighborWorks Project Reinvestment - FINCAP (UnidosUS) – The housing team provided financial counseling/coaching to **71** clients in a one-on-one setting.
- Pathways to Homeownership – During 2018, **123** clients attended the 8-hour First Time Homebuyers seminar. Housing counselors assisted a total of **29** clients to create action plans to become loan ready. **1** participant in the program was able to purchase a house.

**Emerging Entrepreneurs (EE) Program** – Last year, the EE program provided **37 workshops to over 713 entrepreneurs** and small business owners in two counties: Broward (HUF and South Regional Library) and Miami Dade (Ana G. Mendez University System)

- Broward County: the program provided **29 workshops to 465** aspiring & existing small business owners
- Miami Dade: the program provided **8 workshops to 248** aspiring & existing small business owners.

## Citizenship, Civic Engagement, Legal & Equal Treatment/Opportunity

South Florida is home to the 3<sup>rd</sup> largest number of legal permanent residents (Green Card holders) in the nation who are ready to become U.S. citizens. In 2018, HUF served **8,839 clients** in their goal of realizing this dream.

### Citizenship and Immigration

- **Broward County** – A new class was started at the Weston Library in January 2018. This class has been a success with an average class attendance of 16 students per class.
  - Classes were conducted at 13 sites (with support from 17 volunteers). **4,150** LPR's were served and **800** LPR's received assistance with the naturalization application form (N-400).
  - 122 LPR's received assistance with the fee waiver (full I-912 and reduce I-942), which **saved them \$81,160 in application fees.**
  - In addition, **150** individuals received other immigration services.
- **Miami-Dade County** – In 2018, HUF conducted classes at 8 sites (with support from 12 volunteers), served **3,642** LPR's and **97** LPR's received assistance with the naturalization application form (N-400).

**Voter Registration** – HUF helped **100 citizens** to register to vote in 2018.

**Legal Services** - In a partnership with HUF, Legal Aid Service of Broward County has been providing free civil legal services to low income residents of Broward County in the agency's main office. Every week, a representative located at Hispanic Unity's Hollywood office provides assistance in the areas of housing (tenant issues, evictions), divorce with domestic violence, denial of unemployment benefits, denial of disability benefits, and denial of social security benefits. **69 clients received legal services in 2018.**

**Immigration Clinics** – In partnership with Americans for Immigrant Justice, Catholic Charities Legal Service and Legal Aid Service of Broward, HUF hosted four immigration clinics in Broward County in 2018. HUF is the primary marketer of the event and also provides sustenance to the volunteers. Joining the volunteer ranks in 2018 were HUF Board Members, Carolina Cardozo and Emma Pfister. In total, more than **145 clients received free legal services** and those with possible immigration relief were assigned a pro bono attorney to assist them with their case. Clinics took place at Nova Southeastern University's Shepard Broad College of Law (February 2018), HUF (June and November 2018), and Ethel M. Gordon Oakland Park Library (April 2018). (*Public Policy & Advocacy*)

## Language & Education

Our commitment to ensure our children are successful and our families strong is linked to our ability to prepare the whole family through education. In 2018, **2,780 clients received education services.**

**English for Speakers of Other Languages (ESOL)** – The School Board of Broward County (SBBC) provided English classes to over **857** students. Classes were conducted in the morning and in the evening. The objective is to provide English classes mainly to clients seeking employment and pursuing higher education.

**Unity 4Kids** – During 2018, Unity 4Kids served 38 families, **39 children and 71 parents**. Through the Unity 4Kids (U4K) Preschool Program, families were taught parent and child interaction strategies as a way to promote language literacy and language development in their children.

**Special Challenge:** The most significant challenge at the end of 2018 was for HUF to receive **receive** low ratings Kindergarten Entry Assessment (KEA) assessment. KEA was disconnected from the VPK assessment system. While both tools measure literacy and numeracy, they are not the same. The Florida Association for Education of Young Children (FLAEYC), The Children’s Movement of Florida, among other organizations including Hispanic Unity submitted the following request to the The Florida Office of Early Learning (OEL):

- Develop a plan to implement the Grade Level Success Committee’s recommendations to ensure a coordinated early childhood assessment system.
- Develop a realistic schedule and timeline for implementation.
- Discontinue publishing readiness rates based on the KEA system and use the results from the KEA to inform kindergarten instruction to avoid harmful and unintended consequences for young children.

The OEL will not penalize providers for the school year 2016-2017 and 2017-2018.

Unity 4Kids staff started is practicing the assessment with students.

- Unity 4Kids continues to be (for the fourth year in a row) a **5-Star rated school for the Broward County** Quality Rating and Improvement System from the Early Learning Coalition and Child Care Licensing. HUF also maintains its NECPA national accreditation.
- U4K Preschool continues to be a **Family Central Positive Behavioral Support Program (PBS) certified school**. A PBS Provider, the school is equipped to understand children’s emotions and implement problem-solving strategies to address challenging behavior in children.
- In October, Unity 4Kids submitted the Food Program Application with the Florida Department of Health-Food Program Bureau. The application was approved in December. The food program will serve as an income providing financial support of approximately \$5,000 annually to Unity 4Kids Preschool Program.

**Family Strengthening Program (FSP)** – During 2018, FSP served 97 families which included **143 children and 141 parents/caregivers**. . Parents became aware of the importance of replacing abusive behaviors with nurturing behaviors and promoting healthy physical and emotional child development. As a result of the program’s previous outcomes, FSP received its fourth year renewal (10/2018 – 9/2019) with a higher funding allocation of \$236,450 to serve a minimum of 101 unduplicated families.

**Unity 4Teens Middle Schools** – The program served a total of **829 unduplicated students** from Apollo, Attucks, McNicol and Olsen Middle Schools. The program provided academic, STEAM education, career exploration opportunities, nutrition and fitness education, interactive multimedia learning games (focused on core skills in mathematics and literacy), enrichment activities and case management services throughout the year.

U4T launched the two-generation/2Gen approach at Apollo Middle School – HUF’s second pilot of 2Gen. The two-generation approach assists families in confronting economic challenges and empowering them to effectively break the cycle of poverty. U4T also assisted the entire family with different resources, including: disaster relief, financial planning, public benefits applications, as well as, referrals to a number of other HUF programs.

U4T also created a partnership with the Family Nutrition Program from the University of Florida (UF) and the Institute of Food and Agricultural Sciences (IFAS) that encourages all youth to make healthy food choices.



The U4T middle school program was successful in continuing to achieve high student improvement and meet contract requirements for the 2017/18 program year.

- ✓ 100% of participants did not obtain a new law violation
- ✓ 100% of participants did not become pregnant nor cause pregnancy
- ✓ 100% of participants did not use alcohol and/or drugs
- ✓ 99% of participants were promoted to the next grade
- ✓ 100% of participants attended school and the U4T program regularly
- ✓ 68% of participants demonstrated gains in youth development competencies

**Unity 4Teens High Schools** – Students were involved in a variety of academic and personal enrichment activities offered as part of the after school programs. Unity 4Teens served more than **700 students** at Miramar High School and Stranahan High School combined. Students were exposed to several components that taught them a variety of skills to enhance their knowledge and prepare them with tools for life beyond high school. Students had an option to learn financial literacy skills to eventually help them in college, a career and life in general. Juniors and seniors who registered and attended the College and Career Readiness (CCR) component received concentrated training and support with their college applications, building of their own portfolio, interviewing skills and resume writing. Students were also assisted in preparation for taking the American College Testing (ACT) exam. The activities offered during this time were delivered via project-based lesson plans designed by each teacher. They are designed to engage and educate students after their regular school hours.

The U4T high school program was successful in continuing to achieve high student improvement and meeting contract requirements for the 2017/18 program year.

- ✓ 82% of participants decreased external suspensions
- ✓ 83% of participants decreased their # of unexcused absences
- ✓ 84% of participants improved in Reading, Math and Science

Lastly, Miramar High School hosted a 2018 Non-Partisan Voter’s Registration Initiative on Tuesday, June 19, 2018.

### **OTHER ACCOMPLISHMENTS**

- **Jim Moran’s 100<sup>th</sup> Birthday Gift** – In honor of what would have been Mr. Moran’s 100<sup>th</sup> birthday, Jan Moran, Chairman and President of The Jim Moran Foundation, announced gifts to fourteen not-for-profits. HUF received a \$1 million grant in support of its mission to “empower immigrants and others to become self-sufficient, productive and civically engaged.”
- **HUF Investors** - Several funders made significant investments in HUF’s programs this past year:
  - **The Jim Moran Foundation** – In addition to the \$1M gift, the Jim Moran Foundation made a new, three-year, \$1.05M commitment in HUF and CWF and our expanding two-generation 2Gen approach.
  - **CITI Community Progress Makers** – HUF was one of 40 organizations selected nationally to participate in two-year grant and capacity building grant. The selection came with a \$500,000 grant and two years of technical support and education for both the CEO and SVP/Strategy & Programs.
  - **The Frederick A. DeLuca Foundation** – A new foundation supporting two of HUF’s 2-generation (2Gen) pilots.

- **Circle of Friends** – HUF had a full year of this individual giving program in 2018. We held a thank you event in the spring and a second fundraiser in November 2018 to renew memberships and attract new Circle members as well.
- **Peace Love HUF** – HUF launched this campaign which aims to grow our grassroots and corporate funding for the citizenship program. The campaign - which will run through June 2019 - features a \$25K dollar-for-dollar match; one-of-a-kind PEACE LOVE HUF hat or tee designed by nationally-acclaimed, Alina Villasante of PEACE LOVE WORLD fame, and peer-to-peer giving sites for current board members.
- **Other New or Expanded funders in 2018 included:** Third Federal Savings & Loan (new housing grant); NAC (citizenship innovation grant); Univision (cash and in-kind) and BBX Capital Foundation, among others.

**Grant Writing** – In 2018 HUF submitted **67 grant proposals** and earned a **success rate of 72%**. That 72% represents the number of grants we submitted vs. the number of grants we received. Additionally, HUF earned a 52% success rate with new funders (27/14).

- **Miami-Dade Expansion** – An invitation by the Office of New Americans of Miami-Dade County and seed funding from CITI in 2017 led HUF to create partnerships and launch nine new citizenship centers in Miami-Dade County. By the end of 2018, HUF also had secured a new office location in Miami-Dade. We now house two paralegals and support more than a dozen volunteers.
- **Broward Expansion** – Broward County Public Schools invited HUF to take a lead role in their creation of the Gulfstream Early Learning Center in Hallandale. In 2018, HUF created the plan and began significant capital improvements at this facility. By early 2019, twenty-two HUF staffers work from this satellite HUF office providing case management, public benefits screening, free tax preparation and financial education among others.
- **Partnerships**
  - **The Aspen Institute** – HUF was invited to join ASCEND, the Aspen Institute’s two-generation (2Gen) coalition of national providers. The Aspen Institute is providing HUF with invaluable technical assistance and peer-to-peer learning opportunities as we begin to adopt this new approach for our programs.
  - **UnidosUS** – UnidosUS continued to be a major HUF partner, supporting initiatives which help our families in workforce, housing, food security, financial empowerment, digital access & literacy and as a key partner in securing public policy & advocacy funding for HUF.
  - **Prosperity Now** – HUF worked very close with Prosperity Now to increase organizational capacity to address the national challenge of a broad and deep racial wealth divide. The partnership focused on Leadership Development and Financial Capability.
  - **Urban Institute** - HUF participated in an Urban Institute project which resulted in their 2018 release of a research report titled [Upskilling the Immigrant Workforce to Meet Employer Demand for Skilled Workers](#).
  - **NALCAB** – HUF became member of The National Association for Latino Community Asset Builders (NALCAB). In addition of funding opportunities, HUF is eligible to receive technical assistance in policy efforts and program work: Housing, Financial Capability and Entrepreneurship.
  - **10 Days of Connection** – HUF hosted its first Spring Open House on May 3, 2018 to introduce HUF supporters and interested community members to the agency’s work & impact. This event was also a part of the 10 Days of Connection, an annual community-led challenge inspiring locals to step out of their comfort zone and come together with people from different backgrounds, experiences, and perspectives, to unite in our shared

humanity. It was also the first year the 10 Days event expanded to Broward and second year in Miami. The goal of the community-wide initiative is to build empathy, kindness and connection across lines of difference.

- **Board Leadership:** The following officers began their year-long tenure on the board of directors: Charles Tatelbaum, became Chair of the Board; Willy Gomez, Past-Chair; Lucia Rodriguez, Chair-Elect; Emma Pfister, Treasurer and Christina Paradowski, Secretary.
- **Strategic Plan-** The HUF board committees continued to review and implement action items from the agency's 2016-2020 Strategic Plan.
- **Management Team Training & Self-Development** – HUF launched a two-year effort to work with the management team from supervisors to directors. A November 2018 full-day retreat introduced the framework and tools and the team identified the key projects and issues they wanted to pursue starting in 2019.
- **Public Policy & Advocacy** – HUF launched its first full year of public policy & advocacy efforts. With assistance from UnidosUS, HUF secured funding to hire a full-time fellow in Fall of 2017-Spring 2018. HUF supported numerous policy issues and secured VITA Champions. We met with numerous local, state and congressional elected officials both at their district offices as well as in Tallahassee and Washington, D.C. We established connections to numerous coalitions working on similar issues and collaborated with them. We completed an ICE protocol and continued to lead the Children of Immigrant Families Coalition and launched the <https://immigrantfamily.org/> website. And, we secured funding for a part-time public policy coordinator for 2019.

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HUF welcomes and encourages visits by funders and prospective donors. Please visit [www.HispanicUnity.org](http://www.HispanicUnity.org) to learn more about HUF programs or visit the agency at 5840 Johnson Street Hollywood, Florida 33021.

You can reach Josie Bacallao, President/CEO at 954-342-0298 or at the organization's main number, 954-964-8884.

***Empowering a new generation of Americans - for the past 37 years.***



# Report Card: **Board** Date: September 2019 (Jan-Sept)

Board & Fund Development Activity	Total/Activities to Date
<p>1. <b>Personal Gift</b> (self or employer) of \$1,000.00 per calendar year</p>	<p><b>16 of 21</b> have made annual gifts (4 pending gifts)</p> <p>Thank you to 3 board members who have made larger personal gifts.</p> <p><u>Individual Donations</u> <b>\$15,750</b></p>
<p>2. <b>Secure a gift of \$2,500</b> from annual donation(s) or sponsorship(s).</p>	<p>Fundraising: <b>\$2,500</b> per BM Goal: <b>\$42,500 from 20 board members</b></p> <p>Actual to date: <u>Fundraising "Give or Get"</u> <b>\$33,900 from three board members – 17 others have not met this goal – one fundraised \$27K</b></p>
<p><b>Totals from items 1 &amp; 2 above PLUS Corporate Partnerships</b></p>	<p><u>Overall Fundraising:</u> <b>2019 Total: \$129,150*</b> <b>2018 Total: \$164,068</b> <b>2017 Total: \$215,695</b></p>
<p>3. <b>Personally attend one Empowerment Tour per year.</b> Calendar and registration available online after launch of new website.</p>	<ul style="list-style-type: none"> <li>• <b>Steve Sampier (2x) (May)</b></li> <li>• <b>Angie Stone (May)</b></li> <li>• <b>Carolina Cardozo (May)</b></li> <li>• <b>Lucia Rodriguez (May)</b></li> </ul>
<p>4. <b>Mission-Immersion:</b> In-depth HUF program tour during first/1 year term. If re-elected, once during second/2-year term and once during third/three year term. (3 times total)</p>	<p>Everyone is up to date with the exception of the 5 new board members</p> <ul style="list-style-type: none"> <li>- <b>Giselle Cushing, Deborah Pena &amp; Scott Karlen</b> <b>SCHEDULED</b></li> <li>- <b>Lesli Franco &amp; Eduardo Bello</b> waiting on their choice</li> </ul>



<p>5. <b>Make Stewardship phone calls to HUF donors</b> – within 48 hours – of HUF receiving the gift. And communicate back to HUF on the call, hand-written note or email.</p>	<ul style="list-style-type: none"> <li>• <b>February</b> – George Mihaiu &amp; Dan Schevis</li> <li>• <b>March</b> - Carolina Cardozo &amp; Hector Lima</li> <li>• <b>April</b> – Christina Paradowski &amp; Dan Herz</li> <li>• <b>May</b> – Emma Pfister &amp; Lucia Rodriguez</li> <li>• <b>June</b> – Angie Stone &amp; Hector Lima</li> <li>• <b>July</b> – Willy Gomez &amp; Christina Paradowski</li> <li>• <b>August</b> - John Guerrero &amp; Chuck Tatelbaum</li> <li>• <b>September</b> – George Mihaiu &amp; Dr. Rolando Garcia</li> </ul>
<p>6. <b>Introduce two individuals to HUF annually</b> - invite to Empowerment Tour, meeting, breakfast, lunch or HUF Event. (Total 2 new introductions per year.)</p>	<ul style="list-style-type: none"> <li>• <b>Steve Sampier</b> – Invited wife, Bobbie Hayes who brought NSU students</li> <li>• <b>John Guerrero</b> – introduced us to CPA</li> <li>• <b>Hector Lima</b> – introduced us to Citrix colleague</li> <li>• <b>Carolina Cardozo</b> – Introduced us to friend (who became Circle of Friends member)</li> <li>• <b>Lucia Rodriguez</b> – artist at August POE</li> <li>• <b>Angie Stone</b> – Dr. Bernal/BCC at September POE</li> <li>• <b>Scott Karlen</b> – at Socially Good/Leadership Broward event</li> </ul>
<p>7. <b>HUF Advocate:</b> Reach out to elected officials on behalf of HUF and issues important to the agency’s clients.</p>	<p><b>Dan Schevis</b> has consistently reached out to elected officials on various advocacy topics.</p>
<p>8. <b>HUF Ambassador:</b> Support HUF sponsored activities to provide “face” for HUF. Commit to attend <i>at minimum</i> two HUF activities annually.</p>	<ul style="list-style-type: none"> <li>• <b>Angie Stone</b> – Organized and led Leadership Broward &amp; BC board member recruitment events</li> <li>• <b>Christina Paradowski &amp; Leslie Franco</b> – Promoted Socially Good event</li> </ul>



	<ul style="list-style-type: none"> <li>• <b>Chuck Tatelbaum &amp; Scott Karlen</b> both attended Socially Good Event</li> <li>• <b>Carolina Cardozo, Lesli Franco, Willy Gomez, John Guerrero, Dan Herz, Angie Stone, &amp; Chuck Tatelbaum</b> - Ambassadors to VIPs for 2019 E-Summit</li> <li>• <b>Dr. Rolando Garcia</b> – attended 2019 E-Summit</li> </ul>
<p><b>9. Individual Board Member Goal(s):</b>  <b>Options:</b></p> <ul style="list-style-type: none"> <li>a) <b>Join VP Development or CEO on donor/funder call</b></li> <li>b) Host a small event at your home /friend-raising</li> <li>c) Bring in-kind donation (office supplies, marketing services (design, PR, video production), advertising, event tickets for clients/staff, gifts for funders)</li> <li>d) Promote agency regularly on <b>social media</b></li> <li>e) <b>Other</b> _____</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Steve Sampier</b> – New Board Member Orientation; Interviews with all perspective board members</li> <li>• <b>John Guerrero</b> – <u>Three significant in-kind donations:</u> Paella Party, 02/01/19; daughter, Rebecca Guerrero, made in-kind donations on behalf of her employer (Execu-Search); advocate for 02/28/19 Donor Recognition event aboard <i>Gallant Lady</i></li> <li>• <b>Chuck Tatelbaum</b> – Donated office tech equipment; Secured speaker for May 2019 HUF Board Planning meeting</li> <li>• <b>Lucia Rodriguez</b> – Assisted HUF in getting new citizenship video produced and securing Comcast airtime – working on Telemundo airtime as well.</li> <li>• <b>Willy Gomez</b> – Leading the HUF Board retreat planning and strategic plan refresh</li> <li>• <b>Angie Stone</b> - Donated Amy’s Candies &amp; bottle of Spanish wine to be raffled at Leadership Broward’s Socially Good event for donations to HUF; recommended American Dreamer Award recipient, Max Tuchman, for 2019 E-Summit; connected us to</li> </ul>



	Mark Sweeney, who connected us to Jorge Gomez (Samana Group) - 2019 E-Summit workshop speaker and donor (09/24/19)
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\*Includes corporate contributions as follows:

Secured Annual Partnerships / Contracts

- Memorial ACA contract - \$27K (ACA contract)
- JMFEI - \$35K - Annual Partnership
- Citrix - \$10K - Annual Partnership (received CC contribution on 09/16/19)
- Broward College – \$7K – (U4T/2Gen, 2019-2020; invoiced 07.22.19)
- Memorial- \$25K – Annual Partnership<sup>1</sup>

TBD Annual Partnerships

- Comcast - \$25K - Annual Partnership (2Gen Learning Cafe- Workforce Development + Family Strengthening; submitted 07/31/19, pending response)

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<sup>1</sup> \$5K of \$25K prepaid in 2018 for 2019 E-Summit sponsorship