



**Empowering a
New Generation
of Americans**

Board of Directors Annual Retreat

Meeting #7

**Saturday, September 23, 2023
8:30 am – 3:30 pm**

**Florida Blue Community Room
8600 NW 36th Street, Doral, FL 33166**

Mission

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



Board of Directors - Retreat
Saturday, September 23, 2023 | 8:30 am – 3:30 pm

8:30 – Networking Breakfast

9:15 – Call to Order / Roll Call

9:20 – Chair Welcome

9:25 – Florida Blue Miami-Dade Market Leader Welcome Remarks

9:35 – Mission Moment

9:45 – CEO Report

- Hispanic Heritage Month Activities and Events – pgs. 1-2
- 10th Annual Entrepreneur Summit – pgs. 3-4

9:55 Consent Agenda – ACTION

- Board Meeting Minutes (6/2023) – pgs. 5-9
- Finance Committee Minutes (5/2023) – pgs. 10-13
- Finance Committee Minutes (6/2023) – pgs. 14-18
- May 2023 Financial Statement – pgs. 19-30
- June 2023 Financial Statement – pgs. 31-42
- Audit Committee Minutes (6/2023) – pg. 43
- Governance Committee Minutes (5/2023) – pgs. 44-46
- PP&A Committee Minutes (5/2023) – pg. 47
- PP&A Committee Minutes (7/2023) – pg. 48
- Sign on Letter: Congressional Review Act to Repeal Public Charge (5/2023) – pg. 49
- Naturalization Working Group: Comment Response to USCIS Reduced Fees (7/2023) – pgs. 50-53
- Programs Scorecard (6/2023) – pgs. 54-56
- Fund Development Scorecard (6/2023) - pgs. 57-58

10:00 – Strategic Planning – pg. 59

- **Process Timeline Update – pgs. 60-61**
- **Goals, Objectives & Next Steps, Committee Presentations – pgs. 62-66**
 - Programs Committee
 - Governance Committee
 - Public Policy and Advocacy Committee
 - Operations Committee
 - Marketing Committee
 - Development Committee
 - Finance Committee

12:15 – Lunch

1:00 – Group Discussion

- Clarifying Next Steps
- Setting Timeline/Sequence for Next Steps
- Finalizing Next Steps
- **Time-Out / Mental-Break**
- **Final Strategic Plan**
 - Final Draft & Timeline
- **Board Engagement/Role in the Strategic Plan Implementation**
 - Implementation Plan
 - Evaluation of Progress
- **Next steps**









3:30 – Adjourn

18 Active Boardmembers/10 Required for Quorum and Vote





Next Meeting: Virtual on October 10, 2023 at 4pm

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	Board of Directors												
2	2023												
3	Board Members	Jan	Feb	Mar	April	May	June	July	August	Sept	Oct	Nov	Dec
4	ABBATE, Anthony (Tony)	P	P	P	E	P*	P						
5	ALVAREZ, Maritza	P	P	P	P	P	E						
6	ARGUELLO, Ana	A	A	A	A								
7	BARNARD, Maria	P	E	P	P	P	P						
8	BITTAR, Elsa	P	A	P	A	P	A						
9	CARDOZO, Carolina	P	P	P	P	P	P						
10	CUSHING, Giselle	P	P	P	P	P*	P						
11	ESPINOZA, Boris	P	P	A	E	P	P						
12	FRANCO, Lesli	P	P	A	A	A	P						
13	HERZ, Dan	P	P	P	P	P*	P						
14	NASSE, Jeffrey	P	P	E	E	P	P						
15	PARADOWSKI, Christina	P	P	P	P	P*	P						
16	REYES, Christian	P	P	A	A	P	P						
17	RIVERA, Francisco	P	P	E	P	P	P						
18	RODRIGUEZ, Ana	P	P	P	P	E	A						
19	RODRIGUEZ, Lisette	P	P	P	P	P	P						
20	RODRIGUEZ, Lucia	P	P	P	A	P	P						
21	SCHEVIS, Daniel	P	E	P	A	A	A						
22	STONE, Angie	P	P	P	P	P*	P						
23	Total Board Members	19	19	19	19	18	18						
24	Present: P	18	14	13	10	15	14						
25	Excused: E	0	2	2	3	1	1						
26	Absent: A	1	3	4	6	2	3						
27	Board Members Present at the Meeting	94% Zoom	73% Zoom	68% Zoom	52% Zoom	83% Hybrid	77% Zoom	Summer Break	In Person	Zoom	Zoom	Zoom	
28						*In person							



	<p>Shani Wilson, VP of Development</p> <p>swilson@hispanicunity.org</p> <p>754-260-0409</p>		<p>Leonor Romero, Chief Financial Officer</p> <p>lromero@hispanicunity.org</p> <p>754-221-7976</p>
	<p>Elizabeth Dorante, VP of Programs</p> <p>edorante@hispanicunity.org</p> <p>954-600-4318</p>		<p>Ingrid Ekblad, Director of Operations</p> <p>iekblad@hispanicunity.org</p> <p>954-907-1410</p>
	<p>Magaly Alvarado, Director of Civic Engagement</p> <p>malvarado@hispanicunity.org</p> <p>954-907-1354</p>		<p>Yonela Carusi, Director of Education Department</p> <p>ycarusi@hispanicunity.org</p> <p>954-701-5232</p>
	<p>Katherin Gallego, Marketing Director</p> <p>kgallego@hispanicunity.org</p> <p>954-329-5262</p>		<p>Juliana Esguerra, Director of Evaluation and Innovation</p> <p>jesguerra@hispanicunity.org</p> <p>954-639-2043</p>



	<p>Eduardo Pineda, Director of Economic Development</p> <p>epineda@hispanicunity.org</p> <p>954-608-9259</p>		<p>Otayme "Otto" Valenzuela, Associate Director of Public Policy & Advocacy</p> <p>ovalenzuela@hispanicunity.org</p> <p>954-294-6054</p>
	<p>Felina Rosales- Furer, Administrative Manager</p> <p>ffurer@hispanicunity.org</p> <p>954-329-5968</p>		<p>Felipe Pinzon, President & CEO</p> <p>fpinzon@hispanicunity.org</p> <p>954-257-5473</p>



Celebrates Hispanic Heritage Month

September 6

- City of Hollywood will present HUF a proclamation in recognition of National Hispanic Heritage Month.
 - 2600 Hollywood Blvd, Hollywood, FL 33020 @ 1pm
- City of Oakland Park will present HUF a proclamation in recognition of National Hispanic Heritage Month.
 - 3650 NE 12 Avenue, Oakland Park @ 6:30pm

September 15

- St. Thomas University Hispanic Heritage Month Leadership Conference. Panelist: Felipe Pinzon @ St. Thomas University
- The Federal Deposit Insurance Corporation: Advancing Credit Access for Hispanics. Panelist: Elizabeth Dorante – webinar.

September 19

- City of Fort Lauderdale will present HUF a proclamation in recognition of National Hispanic Heritage Month.
 - The Parker Playhouse, 707 NE 8th St, Fort Lauderdale, FL 33304 @ 6pm

September 20

- Project Presentation Family Event – U4K
 - HUF: 5840 Johnson St, Hollywood, FL 33021 @ 6pm

September 23

- Board of Directors Annual Retreat. HUF's vision and future.

- Florida Blue Community Room: 8600 N.W. 36th Street, Doral, FL 33166 at 8:30am

September 28

- Monica Cepero, Broward County Administrator reads to U4K children.
 - HUF: 5840 Johnson St, Hollywood, FL 33021 @ 10am
- Broward County Latin Entrepreneurs Professional Networking Event – Hispanic Heritage Month Celebration. Speaker: Felipe Pinzon
 - The View at Colony West. 6850 NW 88th Avenue, Tamarac, FL 33321 @ 6pm

October 4

- Lamar Fisher, Broward County Mayor reads to U4K children.
 - HUF: 5840 Johnson St, Hollywood, FL 33021 @ 10am

October 11

- Hillary Cassell, State Representative reads to U4K children.
 - HUF: 5840 Johnson St, Hollywood, FL 33021 @ 10am
- Celebrating La Cocina Hispana – Cooking Demonstration
 - HUF: 5811 Conference Room @ 10am

October 13

- Flavors of Gratitude. Staff Event
 - Markham Park, Corporate Pavilion, 16001 W State Road 84 Broward County Parks and Rec., Sunrise, FL, 33326 @ 12:30pm

October 15

- Hispanic Democratic Caucus Breakfast Reception. HUF will receive the “Organizacion de la Comunidad Award”, “Honoring Hispanic Champions in Broward,” during the Hispanic Heritage Month celebration for the work with the Hispanic community.
 - Signature Grand: 6900 W State Rd 84, Davie, FL 33317 @ 9:30am

October 20

- 10th Annual Entrepreneur Summit
 - Alan B. Levan | NSU Broward Center of Innovation, 3100 Ray Ferrero Jr. Blvd., 5th Floor, Davie, FL 33314 @ 8am -1pm



ENTREPRENEUR SUMMIT 2023

The **2023 Entrepreneur Summit** (E-Summit) connects 300+ emerging business owners! Learn what it takes to succeed in business, network with like-minded professionals, and get inspired.



Friday, October 20, 2023 | 8:00 AM - 1:00 PM



Alan B. Levan | NSU Broward Center of Innovation

SCAN
ME



3

GET INFORMED. GET CONNECTED. GET INSPIRED.



ENTREPRENEUR SUMMIT 2023

La **Cumbre de Emprendedores 2023** (E-Summit) reúne a más de 300 propietarios de negocios emergentes! Unese a nosotros para aprender lo necesario para tener éxito en su negocio, establecer contactos con profesionales y sentirse inspirado.



Viernes, 20 de octubre de 2023 | 8:00 AM - 1:00 PM



Alan B. Levan | NSU Broward Center of Innovation

ESCÁNEAME!



4

INFÓRMATE. CONÉCTATE. INSPÍRATE.



Board of Directors
Meeting Minutes
Tuesday, June 27, 2023 | 04:00 PM

Call to Order / Roll Call

Christina Paradowski and Felina Furer

Began at 4:00pm

Chair Welcome

Christina Paradowski

The meeting commenced with a celebratory note, acknowledging Carolina Cardozo's upcoming birthday on June 29th.

The team rejoiced in HUF's recent recognition, as earlier this month, the Broward County Hispanic Bar Association honored HUF with the prestigious title of 2023 Hispanic Organization of the Year.

June was a month of significant celebrations and acknowledgments. The team highlighted Juneteenth, Pride Month, and Immigrant Heritage Month, underlining the importance of these events and their alignment with HUF's values.

A significant announcement was made during the meeting: Felipe's acceptance into the Florida Leadership Cornerstone class 2023-2024. This accomplishment was celebrated as a remarkable opportunity to broaden HUF's outreach and establish valuable partnerships.

CEO Report

Felipe Pinzon

Appreciation was extended to Tony Abbate, Francisco Rivera, Dan Herz, and Ana Rodriguez for their efforts in introducing new supporters to HUF.

The appropriations update conveyed that the \$500k funding for the HEAL program was unfortunately vetoed by the Governor. Felipe expressed gratitude towards the staff and board members who passionately advocated for our application. Despite the setback, the organization remains resilient and is committed to regrouping and reapplying for the funding in the next year.

Recognition was given to Maritza Gil for her outstanding dedication as she celebrated her 20-year work anniversary with Hispanic Unity. She is a valued member of the Education department team.

In further announcements, it was shared that Elizabeth Dorante was invited to join the 2023-2024 Mosaic Fellowship, made possible by UnidosUS. Congratulations were extended to Juliana Esguerra on her recent promotion to the role of Director of Evaluation and Innovation. Additionally, Otto Valenzuela was highlighted for being selected as a member of Leadership Broward Class XLII and for his appointment by Broward County Commissioners to serve on the Racial Equity Task Force.

Exciting news followed, revealing a new contract with CSC for the Family Strengthening Program. The organization was awarded \$956k+, allowing the expansion of services to reach and support 240 families.

Finance

**Dan Herz, Leonor Romero,
Andrew Fierman (Caballero,
Fierman, Llerena & Garcia)**

Dan Herz provided an update that the Audit Committee unanimously voted 3-0 last week to accept the financials. Regarding note two, item M, a request was made to complete the subsequent event date. Additionally, it was decided to incorporate our primary provider, the Children’s Services Council.

Andrew Fierman, the partner at CFLG overseeing Hispanic Unity of Florida’s 2022 Audit, presented a comprehensive review of the Auditor’s report. The Auditor provided a clean opinion on HUF’s financials, noting total assets at \$6 million+, showcasing a \$1.5 million increase primarily due to a surge in cash reserves. Liabilities increased by \$135k+. Total revenue was noted at \$2.4 million. However, expenses exceeded revenue at \$7.7 million, signaling a \$1 million rise. The Statement of Functional Expenses highlighted an increase in salaries and consultant fees. On a positive note, the Statement of Cash Flow depicted an overall increase in cash. Andrew emphasized that accounting disclosures had changed this year, with no significant leases impacting the report. Capital leases are now reflected on the balance sheet. The lease with Broward School Board for space at 5811 Johnson St was duly listed. Furthermore, during the Federal single audit, no instances of noncompliance or discrepancies were identified. Given HUF's receipt of over \$750k in government funding, an additional report was required, and it received a clean assessment. In the communication to those in charge letter, it was stated that there were no difficulties in completing the report or discrepancies with management.

Leonor Romero shared a notable achievement, highlighting that HUF has experienced a remarkable growth of 37%. Notably, 95% of the expenses are allocated to programmatic areas.

Dan Herz motioned to accept the 2022 Audited Financials to form. A second was made by Tony Abbate. Motion passed.

Strategic Plan – Proposed Goals and Objectives

Christina Paradowski & Felipe Pinzon & VeraCruz

Felipe reiterated the central theme of our strategic plan, emphasizing "our community" as the focal point. He highlighted The State of Hispanic Immigrant Broward as a primary data provider. Stressing the significance of having a home and employment for self-sufficiency, Felipe underscored the importance of assets. Feedback from the Client Focus Groups emphasized the need for HUF to enhance its visibility.

Carlos de Quesada from VeraCruz presented insights and feedback gathered from external stakeholders. VeraCruz conducted interviews with over 25 stakeholders. The recurring feedback emphasized HUF's role as a collaborative organization deeply connected with the community. Suggestions were made to improve the storytelling of our clients, thereby enhancing HUF's visibility. Board succession planning and fund development were identified as high-priority areas. Notably, staff feedback pointed to "people" as one of the top five priorities. Felipe discussed his CEO feedback, emphasizing the significant opportunity to diversify revenue streams. He informed the board about the recent hiring of Cloud9, a consulting firm tasked with assisting in individual giving initiatives. Felipe stressed the power of sharing immigrant stories to challenge negative narratives, shifting focus from "what" to "how."

Carlos outlined the first goal: responding to current and emerging community needs by increasing access to HUF's programs and services. The objective is to ensure that programs and services effectively respond to evolving community needs, increasing community access to them. Lucia Rodriguez suggested incorporating financial wellness and education, which Felipe confirmed is already part of our program.

The second goal is to expand income and wealth-building opportunities for working families. The objective includes strengthening workforce education to adapt to the South Florida labor market, providing comprehensive support and resources to aspiring homeowners and business owners.

The third goal centers on defining and strengthening HUF's role in Policy and Advocacy. Objectives include developing a comprehensive policy agenda outlining HUF's desired impact, empowering staff to become advocates for HUF's clients, addressing the Hispanic gap in leadership positions, engaging in conversations regarding systemic issues, strategically selecting partners, and gathering impact data to confront policies.

The fourth goal is to position HUF for growth while achieving operational excellence. This involves increasing HUF's visibility through enhanced outreach and communication, diversifying sources of revenue, implementing a centralized HR office for talent retention and attraction, and focusing on efficiency and effectiveness in infrastructure.

Board members were invited to express their interest in joining the Development or Operations committee. The standing committees will meet for an extended session in the summer to review the goals. A framework for detailed implementation plans, with no more than three next steps per objective, will be determined.

It was requested to email the board the strategic planning document presented during the meeting. A revised version of the document will be shared later this week. This document will be shared with committee members a week prior to the meeting in their packet. It was also noted to include the thank-you calls as part of the Development presentation.

Christina provided an update regarding the upcoming board retreat scheduled for Saturday, September 23rd, in Miami. The final plan for the retreat is being refined.

Governance	Tony Abbate
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The 2023 Q1 BOD Overall Performance review will be conducted regularly by the Governance committee and presented to the board quarterly. The practice of sharing the assessment link will be initiated at the beginning of each meeting via the chat. Additionally, going forward, the link for the self-assessment will be included on the cover page of the board packet.

Regarding HUF Board terms, it was decided to extend the term limit by one year. Three board members, namely Lucia Rodriguez, Dan Schevis, and Angie Stone, have opted out for this extension.

Public Policy & Advocacy	Carolina Cardozo & Otto Valenzuela
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Regarding Florida HB 1617 & SB 1718, it is set to take effect this Saturday, July 1st. To ensure informed understanding, a general education webinar was conducted on June 1st to educate our partners and staff about the implications of the bill. In collaboration with CSC and Catalyst Miami, additional efforts include hosting a Spanish-language webinar tomorrow, reaching out to the community for the first time. Further engagements involve upcoming townhalls where Otto will be a presenter. In mid-July, Otto is coordinating an E-Verify webinar with HUF's labor law attorney to educate the business community, particularly addressing concerns from various hospitals regarding

immigration status inquiries. All our related materials are being disseminated under the CIFC logos, etc.

Tony Abbate expressed interest in collaborating with Otto to gather data on the legislation and conduct training sessions for Chambers.

Fund Development	Shani Wilson
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Thank You Calls: Shani emphasized the importance of donor retention through simple gestures of appreciation. Board members were requested to review their schedules, make thank you phone calls, send handwritten notes, and share feedback regarding their interactions with donors.

Entrepreneur Summit: An update on the Entrepreneur Summit was provided. The location is pending, with efforts directed towards securing The Levan Center at NSU. Exciting workshops have been planned, and the event is anticipated to take place during the 1st or 2nd week of October.

Consent Agenda	Christina Paradowski
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Tony Abbate motioned to approve the consent agenda. A second was made by Dr. Jeffrey Nasse. Motion passed.

Executive Session	Christina Paradowski
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A brief session took place.

Adjourn

At 6:05pm

Next Meeting: Saturday, September 23rd @ 8:30 am (Retreat)



Finance Committee
Meeting Minutes
Thursday, May 18, 2023 | 9:00 AM

Call to Order / Roll Call

Lisette Rodriguez and Felina Furer

Began at 9:00am

Present: Lisette Rodriguez, Alejandro Loscher, Christina Paradowski, Rodney Bacher, Christian Reyes, Maria Elena Ferrer and Arnold Nazur

Excused: Myrna Monserrat

Absent:

Approval of April 2023 Minutes

Lisette Rodriguez

Motion to approve the April minutes by Arnold Nazur. A second was made by Maria Elena Ferrer. Motion passed.

Program Performance – Scorecard Review

Elizabeth Dorante

Last March 7th, the Education department submitted a Request for Proposals for the Family Strengthening Program to the Children’s Services Council. This proposal included a request for an expansion in both the number of families to be served as well as the budget proposed. This week HUF received confirmation of our award for the next 4 years starting in October 2023. These are the results which match almost 100% our request:

- A budget increase of almost 80% - a total of \$944K
- The new number of families to be served increased 50% from 160 to 240.
- Contract negotiations will start as soon as tomorrow Friday May 19

Regarding the other two CSC funded programs, Youth FORCE and LEAP High, the Request for Proposals will be released at the end of this year for contracts starting in August 2024. For the contract year 2023-2024 both programs kept a flat budget of 11 months.

Overall, the department is doing well, and dashboard shows no programs in red as they all prepare to offer strong summer programs starting in mid-June.

Economic Development department, the VITA program is in the red showing NOT being on track to meet its goals. Last but not least, the Civic Engagement department where contracts continue well on their way to reaching their performance goals as well as the department revenues. There was an increase in revenue in comparison to the previous month (from \$14,495 in February to \$15,544). The program surpassed projections (\$4,500) during this month.

Fund Development Update	Felipe Pinzon
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HUF's budget for 2023 is just over \$8.7 million. This year, HUF is tasked with raising more than \$1.7M, including \$560,000 in unrestricted funds and \$1.1M in restricted or grant funding. To date, we have secured \$96,390 (or 17%) of our \$560,000 unrestricted fundraising goal. This is up \$45K from last month.

With respect to our \$1.1M grant revenue goal, HUF has secured \$162,720 (or 14%) of the goal for this year; this is up \$7500 from last month. Last month we shared that HUF was awarded a \$300K multi-year grant from the Community Foundation of Broward for the Center for Working Families. The agency keeping track of what's for this year, and what will be released for future years.

What's new is separate tracking of the Miniaci family's match grant challenge dollars. The goal for our first year (through June 30, 2024) is to raise \$50,000. These funds will support HUF's 2Gen approach to workforce development and employment services for young adults, parents, and others. What's not reflected on the dashboard are \$50,000 from The Jim Moran Foundation (\$30K) and Community Foundation of Broward (\$20K) for disaster relief. These funds will go directly to eligible clients and staff to help them recover from last month's flooding.

We are pending responses from 26 grant proposals totaling \$3.7M. In the meantime, we are planning to submit at least another \$480K in requests by the end of the year. This amount does not include highly anticipated RFPs from the Children's Services Council for Unity 4Teens and the Volunteer Income Tax Assistance Program. In addition, our team regularly seeks and receives grant opportunities, so we fully expect this number to be higher through December.

We are also pitching \$330K in unrestricted funds, including a two-year \$200K unrestricted funding opportunity from Bank of America. Lastly, we continue to plan for an in-person Entrepreneur Summit to take place this fall.

March—Net Results	Leonor Romero
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Leonor reviewed highlights: HUF had the repayment of the line of credit for \$280K as you see the comparative is over year-end vs. the YTD as of March. Accounts receivable is standard for timing during this time of year. For prior year there are some Board of Directors pending items; and one aging \$35K from TJMF Shani is meeting to f/u with them.

For March comparative with 2022, Finance Committee will recall that we presented April 2022 vs. monthly. Overall, we have favorable results compared to prior year; the main area as reported by Elizabeth comes from units with Education. At this time program staff are establishing summer plans to maximize this units' overage.

Lisette asked about increasing the line of credit and if we would not need the line of credit. Leonor explained we may need it later this summer depending on funding delays. There have not been any audit adjustments that would affect 2022 overall. Maria Elena asked about the line of credit rate. It is prime + 0.

We have 18 open positions that we are having trouble filling. Felipe believes HR in house will help our retention and adding capacity. We are hoping to open an HR manager position in the future. Maria Elena asked if we are using a recruiting company, we are, and they do specialize in nonprofit hires. Leonor is working on digitizing and creating more processes to make our systems easier.

Motion to approve March net results by Arnold Nazur. A second was made by Christian Reyes. Motion passed.

Updates	Leonor Romero
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Audit Timeline: We are subject to a single audit due to receiving over \$750K of federal funding. Target date draft of the audit is June 13th. Board will review and approve on June 27th. HUF then will submit to Submit to the funders June 29th. There are some gaps with the transition that may come up in close-out but nothing material.

Proposed Audit committee: Dan Herz, Christian Reyes and waiting on confirmation of Elsa Bittar. Lisette will review it separately as she has done in the past.

Strategic Plan: Felipe shared there is a program and advocacy committee who have met several times and have recommendations which will be presented to the strategic planning committee in June. We hope to share those recommendations to the board on June 27th. From there it will be shared with our existing committees and review goals and objectives. Finally present to board for approval at September retreat.

Travel Policy: What changed is meals were being reimbursed by receipts where now they will be reimbursed per diem and by location. Updated to industry standards.

Motion to approve the travel policy by Maria Elena Ferrer. A second was made by Arnold Nazur. Motion passed.

At this moment all policies are to go through the finance committee. Governance will discuss this at the next meeting to discuss operational efficiencies and who/what needs to be approved at what level or by board.

Adjourn

Lisette Rodriguez

At 10:01am

Next Meeting: Thursday, June 15, 2023 @9am



Finance Committee
Meeting Minutes
Thursday, June 15, 2023 | 9:00 AM

Call to Order / Roll Call

Lisette Rodriguez and Felina Furer

Began at 9:00am

Present: Lisette Rodriguez, Alejandro Loscher, Christina Paradowski and Arnold Nazur

Excused: Myrna Monserrat and Rodney Bacher

Absent: Christian Reyes and Maria Elena Ferrer

Guest: Ana Rodriguez

Approval of May 2023 Minutes

Lisette Rodriguez

Arnold Nazur motioned to approve May minutes. A second was made by Lisette Rodriguez. Motion passed.

May minutes are revised to remove Maria Elena Ferrer's motions as she is not a voting member to this committee. Lisette Rodriguez is the replacement for the motions for both May Minutes and Travel Policy. Without Maria Elena Ferrer, the Finance Committee still maintained quorum for May meeting.

Program Performance – Scorecard Review

Felipe Pinzon

Education Department:

Regarding the Program Goals for April's scorecard,

- FSP is on track to meet performance goals by the end of the contract period. Both cycles completed surpassed programs projections and we are ahead in the projection by 13 families served. During the last quarter of its FY, the program will have to successfully serve 53 families to reach 100% of its performance goal.
- The U4K program has reached a maximum capacity at 20 children and has maintained it for the past two months.
- Youth FORCE fell short to reach the goal of 350 registration by registration 319 but attendance which brings the unit dollars, surpassed the goal by 14 students.
- LEAP High reached its registration goal of 210 except attendance which brings the unit dollars fell short by 30 students.

Regarding Program Revenues:

- in the FSP program a total of \$54,333 was secured during the month of April out of \$49,998 projected.
- in U4K total revenues for the month fell short by \$1,667.
- Youth FORCE surpassed its revenue goal for the month by \$37,394.
- Unfortunately LEAP High fell short of its goal by \$20,125 mainly due to the low attendance.

Economic Development Department:

Regarding the Program Goals,

- VITA Program fell short of their goal to submit 1,350 returns by submitting a total of 804. The continued rain and flooding highly impacted the performance of this program. All sites closed for multiple days. Hence the lower number of returns in a month that historically yields the highest number of returns.
- AmeriCorps, unfortunately, also fell short of 14 clients in its projections for serving 60 individuals; during the month, 14 individuals improved job readiness out of a goal of 30.

Regarding the Program Revenues,

- The Center for Working Families shows close to meeting its goals but is not there yet.
- There is funding for UW ending in June and Broward County ending in September. In both cases, the number of participants served or improving a goal was lower than projections. Please know that this program is undergoing some important and needed changes/upgrades regarding procedures that will create efficiencies in the data collection. The team has been incorporating these new procedures which we are very hopeful will show improvement in the outcomes and goals.
- The VITA program fell short in reaching the projected and the program is starting its extended services in early June which we hope will bring additional returns and revenue.

This program renewed its contract with UW, has applied to a new RFP with the IRS and will also do the same with CSC's RFP sometime in June/July. The team is carefully reviewing the proposal and the number of returns to be proposed. Despite the numbers we see, I would be remiss if I did not mention that the program has steadily improved since 2020 by increasing the returns year after year.

Civic Engagement Department

Regarding the Program Goals,

- When you look at the numbers closely, you will see they look phenomenal. The contract with Miami Dade County that ends in September is 10 TPS away from reaching its goal. All other contracts end in 2024 are all well under way to reaching their goals.

Regarding the program revenue,

- In the first 4 months of the year, the revenues of the program has surpassed the 50% mark.
- Overall, the department is doing extremely well in providing services, keeping the community civically engaged and possibly surpassing its annual goal in revenues.

Felipe shared there are three staff positions we are looking for alternate funding in order to retain them. If not, we do have open positions; hopefully, they would qualify for some of those if we do not get new funding.

Fund Development Update	Felipe Pinzon
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Our budget for 2023 is just over \$8.7M. This year, we are tasked with raising more than \$1.7M, including \$560,000 in unrestricted funds and \$1.1M in restricted or grant funding. To date, we have secured \$102,799 (or 18%) of our \$560,000 unrestricted fundraising goal. This is up about \$6,500 from last month.

With respect to our \$1.1M grant revenue goal, we have secured \$486,250 (or 43%) of our goal for this year.

Last month, we introduced separate tracking of the Minaci family's match grant dollars and shared that we received \$50K for disaster relief funds from The Jim Moran Foundation and Community Foundation of Broward. We have not received additional funds for either of these projects since last month. However, going forward, you will see them depicted in our report.

Previously, we only discussed multi-year awards and explained variances between what will be booked for this year (the full award amount) and what is in fact secured for the year. To make it simple, we have adjusted our reporting to show you only what has been secured for this year's goal and future years. This will impact reporting in other areas, such as the total amounts of grants awarded. However, the change will help us focus on our immediate priorities.

We are pending responses from 30 grant proposals totaling \$2.9M and planning to submit at least another \$320K in requests by the end of the year. We are still waiting for details on the release of RFPs from the Children's Services Council for VITA and Unity 4Teens. Based on informal conversations, we expect to be working on VITA by the end of this month (\$350K) and U4T in November (\$1M). In addition, our team regularly seeks and receives grant opportunities; so, we fully expect this number to be higher through December.

Lastly, we are working with Nova Southeastern University to secure a space for an in-person Entrepreneur Summit this October. Cross your fingers and toes that we can

secure the Levan Innovation Center that was our usual location that is undergoing renovations

April 2023 Financial Statements

Leonor Romero

Leonor shared the restricted revenues are higher than projected. She plans on paying off the rest of \$20k of our credit line. We have a positive in the Admin, overall our cash is stable. Many of the grants are stabilizing and coming in strong as the year passes. There is attrition in programmatic salaries we will use going forward as they are unit based and is the norm for these grants.

Lisette Rodriguez asked about the property insurance increase previously reported so the committee was informed. Leonor shared impact will show in June's renewal as a \$15k increase for the full year cycle. The premium is now at an annual total of \$50k.

Arnold Nazur motioned to approve the April financial statements. A second was made by Lisette Rodriguez. Motion passed.

Updates

Leonor Romero

Audit Update: The draft should be completed by Monday. There is a new pronouncement for disclosing lease commitments. We were subject to the federal grant single audit as we had \$800k+ in federal funding. We are having an Audit committee meeting on the 20th to review. Lisette will review the draft to expedite the notes/financials directly.

Employee Handbook Update: Ingrid Ekblad shared HUF has been working on this project since March 2023 with our HR consultant, Maria Elena Gurdian of MEG Development. As part of the project, on May 12th, Maria Elena conducted training for the management team on the critical areas of FMLA, ADA Accommodations, and Confidentiality.

The first draft was reviewed by Leonor and Ingrid through several weekly meetings over the last few months with our HR consultant. The final draft of the handbook was completed ahead of schedule on June 2, 2023. The handbook along with summary of material changes was shared and reviewed with Felipe in early June. Some of the important items to note are additional regulatory and compliance items Maria Elena has identified for addition to the Handbook.

The draft was also sent to the Directors for feedback by June 9, 2023. Because 2 key members of the senior leadership team were out during this review period, Elizabeth and Shani, we are moving the timeline out a bit to give them the chance to review by end of June to provide feedback. We also provided a brief update to the board. Draft

with summary of material changes is also being reviewed by our labor attorney Pedro Torres-Diaz and should be in receipt of his feedback in the coming weeks. We are also asking for some feedback from staff at the next agency meeting on what they believe they want to see/need from the new handbook.

Our goal is to finalize by the end of June/first week in July to share with this committee and then if approved, for final Board approval. Once reviewed and approved by the Board, Ingrid will be working with Maria Elena on training for the Management Team to navigate and assist with the use of the new handbook in their day-to-day management of staff. This will include SOPs. These trainings are scheduled to launch in late July into August 2023.

Strategic Plan: Felipe Pinzon shared there are strong recommendations such as increase access to programs, increasing income and helping clients build asset building of wealth and HR/facilities to manage growth over the next three years. More focus on the Advocacy agenda and filling the in space moving forward. Once the board approves it on June 27th then they will be able to share with committee members. Going forward, committee members will work on breaking down the next steps for the recommendations to be realized.

Other Business: Leonor Romero shared that yesterday fraud was discovered. There were two transactions from the internet for over \$2k+; she has been working with the bank to freeze the account. The positive pay items will still go through. Frozen for withdrawal of any kind. We will have another account opened and close existing. She has made a claim for fraud to get the funds back. Her plan is to limit paper transactions and add services that require approvals via ACH.

Arnold Nazur suggested changing the definition of quorum for Finance committee, such as, Chair and two members. Christina mentioned it would need to be vetted by the Governance Committee. In the meantime, when Maria Elena Ferrer attends, her vote will not count because she is not an “official committee member”.

Adjourn

Lisette Rodriguez

At 9:57am

Next Meeting: Thursday, July 20, 2023 @9am

HISPANIC UNITY OF FLORIDA, INC.

FINANCIAL STATEMENTS

For The Five Month Ending May 31, 2023
(WITH COMPARATIVE TOTALS FOR THE YEAR ENDED DECEMBER 31, 2022)

Prepared by: L. Romero 7/13/23
FOR REVIEW BY CEO/FINANCE COMMITTEE
SOURCE: SAGE PEACHTREE @ 05/31/23 / TR SCHEDULE

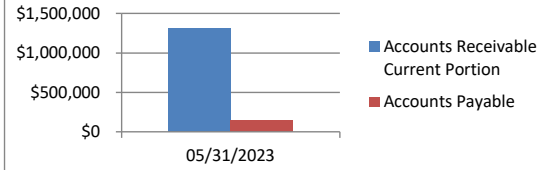
05/31/2023 Dashboard

Revenue YTD Compared to Previous YTD

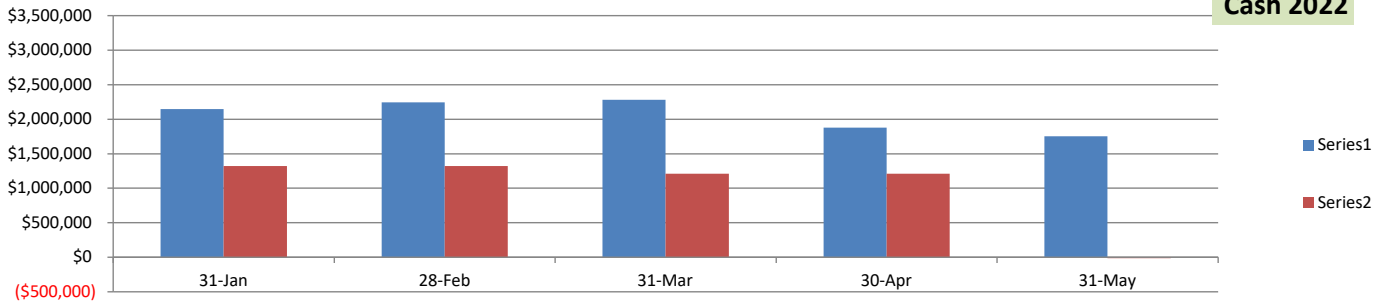
05/31/2023

	Revenue YTD as of 5/31/2023	Revenue YTD as of 5/31/2022	Year Over Year Chng
Unrestricted Revenue	\$3,357,884	\$2,471,740	\$886,144
Restricted Revenue	(\$240,437)	(\$545,913)	\$305,476
Total Revenue	\$3,117,447	\$1,925,827	\$1,191,620

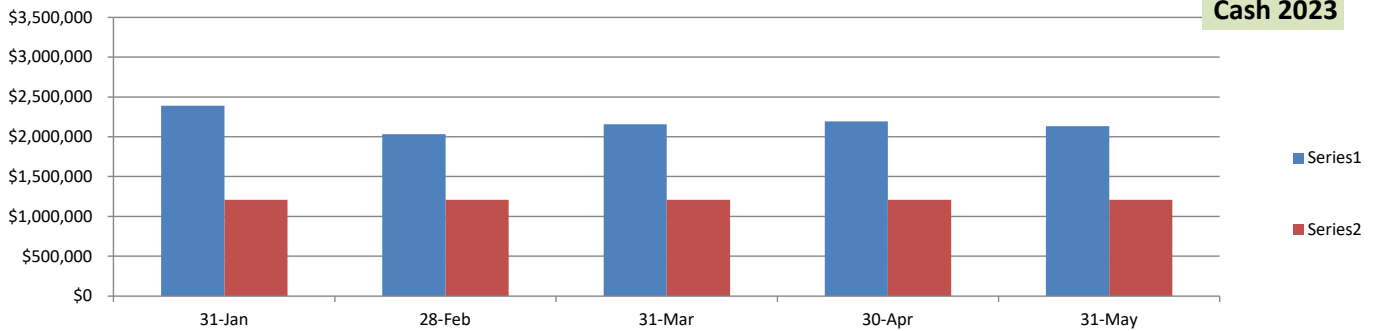
Accounts Receivable Vs Payables May 2023



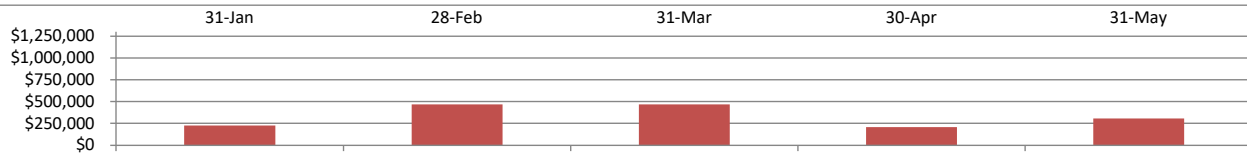
Cash 2022



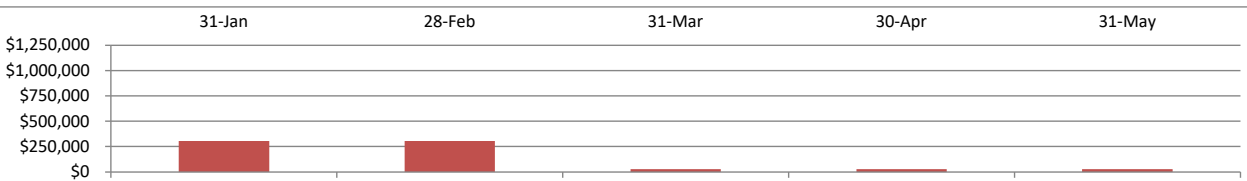
Cash 2023



Line of Credit Usage 2022



Line of Credit Usage 2023



Hispanic Unity of Florida, Inc.

Notes to Financials

05/31/2023

UNR Net Assets

Preliminary

Reconciliation of UNR Net Assets:

1 Gain/(Loss) From Program Operation	1,035,478
2 Gain/(Loss) from Support Services	(229,618)
Inc(Dec) in UNR Net Assets	<u>\$ 805,860</u>

Includes:

From Net Assets "Released Prior Year"	(686,796) for current year operations
From Net Assets "Released Current Year"	(32,564)
Subtotal Released PY & CY	(719,360)
YTD Actual Agency Over (Under)	86,500

The year-to-date projected operating surplus was \$17K. Our year-to-date actual was \$86.5K

- 1) Development YTD had a unfavorable budget variance \$80K but is normal for this time of year.*
- 2) Programs YTD had a favorable variance of \$790K, includes Donor with Restrictions released totaling \$590K (includes new secured future funding aprox. \$233K beyond 2023)*
- 3) Admin YTD had a favorable budget variance of \$85K, includes Donor with Restrictions released totaling \$129K*

Cash

Year to date cash decreased by \$453K as a result of the following activities:

\$ 90,500	<i>Inc/(Dec) in Net Assets</i>
(282,352)	<i>Adjustments to reconcile increase (decrease) in net assets</i>
(191,852)	<i>Net cash provided (consumed) by operating activities</i>
(17,318)	<i>Investing Activities</i>
(287,885)	<i>Financing Activities</i>
<u>\$ (497,055)</u>	<i>Inc/(Dec) in Cash</i>

HISPANIC UNITY OF FLORIDA, INC.
STATEMENT OF FINANCIAL POSITION
For The Five Month Ending May 31, 2023
(WITH COMPARATIVE TOTALS AS OF DECEMBER 31, 2022)

	<u>2023</u>	<u>2022</u>
<u>ASSETS</u>		
Current Assets		
Cash	2,131,959	\$ 2,629,014
Grants receivable, net	1,107,824	816,742
Unconditional promises to give, net	206,454	244,028
Prepaid expenses	<u>16,297</u>	<u>31,666</u>
 Total Current Assets	 <u>3,462,533</u>	 <u>3,721,450</u>
Non-Current Assets		
Long term conditional promises to give	1,160,624	1,156,944
Property and equipment, net	1,136,790	1,181,560
Deposits and Other Assets	<u>33,049</u>	<u>33,249</u>
 Total Non-Current Assets	 <u>2,330,463</u>	 <u>2,371,753</u>
 Total Assets	 <u>5,792,997</u>	 <u>\$ 6,093,203</u>
<u>LIABILITIES AND NET ASSETS</u>		
Current Liabilities		
Accounts payable and accrued expenses	151,897	\$ 254,719
Mortgage payable, current	17,889	19,705
Line of credit	<u>25,095</u>	<u>306,339</u>
 Total Current Liabilities	 <u>194,881</u>	 <u>580,763</u>
Noncurrent Liabilities		
Mortgage payable, net of current portion	<u>732,540</u>	<u>737,365</u>
 Total Non-Current Liabilities	 <u>732,540</u>	 <u>737,365</u>
 Total Liabilities	 <u>927,421</u>	 <u>1,318,128</u>
Net Assets		
Without Donor Restrictions	2,064,757	1,805,376
With Donor Restrictions	<u>2,800,819</u>	<u>2,969,699</u>
 Total Net Assets	 <u>4,865,576</u>	 <u>4,775,075</u>
 Total Liabilities and Net Assets	 <u>5,792,997</u>	 <u>\$ 6,093,203</u>

HISPANIC UNITY OF FLORIDA, INC.
STATEMENT OF ACTIVITIES
For The Five Month Ending May 31, 2023
(WITH COMPARATIVE TOTALS FOR THE YEAR ENDED DECEMBER 31, 2022)

	Without		With		2022
	Donor Restrictions		Donor Restrictions	Total	Total
Revenues and Other Support:					
Contributions	Contributions, with donor	\$ 126,800	\$ 479,323	\$ 606,123	\$ 3,495,781
Special events		-	-	-	-
Grants from government agencies		2,147,011	-	2,147,011	4,575,834
Other grants and fees		194,322	-	194,322	534,236
Miscellaneous	Miscellaneous, with donor	169,700	\$ 290	169,990	277,239
Contributions of nonfinancial assets		-	-	-	20,454
Net assets released from restrictions:					
Satisfaction of time restrictions		719,360	(719,360)	-	-
Satisfaction of program and purpose restrictions		690	(690)	-	-
Total Revenues and Other Support		3,357,884	(240,437)	3,117,447	8,903,544
Expenses (Functional)					
Program services		2,788,472	-	2,788,472	7,338,223
Management and general		212,166	-	212,166	368,317
Fundraising		30,309	-	30,309	42,657
Total Expenses		3,030,947	-	3,030,947	7,749,197
Change in Net Assets		326,937	(240,437)	86,500	1,154,347
Net Assets - Beginning of Year		1,737,819	3,041,256	4,779,075	3,620,728
Net Assets - End of Year	w/ all releases	2,064,756	2,800,819	4,865,575	4,775,075

HISPANIC UNITY OF FLORIDA, INC.
STATEMENT OF CASH FLOWS
For The Five Month Ending May 31, 2023
(WITH COMPARATIVE TOTALS FOR THE YEAR ENDED DECEMBER 31, 2022)

	<u>2023</u>	<u>2022</u>
Cash Flows from Operating Activities		
Increase (decrease) in net assets	\$ 90,500	\$ 1,154,347
Adjustments to reconcile increase (decrease) in net assets to cash provided by operating activities:		
Depreciation	62,288	140,009
Changes in assets and liabilities		
(Increase) decrease in grants receivable	(291,081)	19,249
(Increase) decrease in unconditional promises to give	33,894	(951,059)
(Increase) decrease in prepaid expenses	15,369	(6,446)
(Increase) decrease in security deposits and other assets	-	476
Increase (decrease) in accounts payable and accrued expenses	<u>(102,822)</u>	<u>52,658</u>
Total adjustments	<u>(282,352)</u>	<u>(745,113)</u>
Net Cash Provided by Operating Activities	<u>(191,852)</u>	<u>409,234</u>
Cash Flows from Investing Activities		
Acquisition of property and equipment, net of retirements	<u>(17,318)</u>	<u>(23,311)</u>
Net Cash (Used In) Investing Activities	<u>(17,318)</u>	<u>(23,311)</u>
Cash Flows from Financing Activities		
Net Advance (Repayment) of LOC	(281,244)	295,000
Borrowing (Repayment) of mortgage	<u>(6,641)</u>	<u>(18,656)</u>
Net Cash Provided by Financing Activities	<u>(287,885)</u>	<u>276,344</u>
Increase (decrease) in Cash	(497,055)	662,267
Cash - Beginning of Year	<u>2,629,014</u>	<u>1,966,747</u>
Cash - End of Year	<u>\$ 2,131,959</u>	<u>\$ 2,629,014</u>

Cash Detail
As of 05/31/2023

Without Donor Restrictions and With Donor Restrictions Cash:

1010-000AAAS	Bank of America	Operating	51,880	
1025-000AAAS	BB&T	Payroll	2,812	
1026-000AAAS	BB&T	Operating	615,317	
1000-000AAAS	Petty Cash	Imprest	500	
1023-000AAAs	BB&T	Asset Reserve Fund	134,074	
1022-000AAAS	BB&T	Reserve Fund	117,354	921,938 Without Donor Restrictions
1021-000AAAS	BB&T - Money Market	Opportunity Fund	510,166	
1024-000AAAS	BB&T - Money Market	Grantor Funding	699,855	1,210,021 With Donor Restrictions

\$ 2,131,959	TOTAL CASH
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**Temp Restricted Schedule
For The Five Month Ending May 31, 2023**

0 0

	AREA	CC	December 31, 2022	Increase/ (Decrease)	Additions	Increase/ (Decrease)	May 31, 2023
Awards Brought Forward to 2021							
Third Federal Bank (4060) - General	UUDS	000	50,000	(50,000)			0
TJMF - 9-01-18 - 8-31-23	Admin	000	130,170	(43,000)			87,170
Kresge Foundation (The) - Kresge Foundation - Database	YDEP	004	186,000	(30,292)			155,708
Unidos Medic Grant	AAAS	013	4,000	(4,000)			0
Unidos Policy & Advocacy Medic - ACA final report due 8/8/22	AAAS	013	5,000	(7,595)			(2,595)
Unidos Policy & Advocacy Medic - MED-ACA 1122-0823-1	AAAS	013	14,500	-			14,500
UnidosUS - Citizenship Savings - Grant Civic Engagement Citizenship	CZZP	156	3,750	-			3,750
City of Hollywood Police Depar - LETF - U4T High School Grant	ODEP	167	10,000	-			10,000
Tate Foundation 2023 Community Fdt	UKEP	173	20,000	(20,000)			0
Tate Foundation 2024 Community Fdt	UKEP	173	20,000	-			20,000
Tate Foundation 2025 Community Fdt	UKEP	174	20,000	-			20,000
UnidosUS - Comprando Rico y Sa - UnidosUS-RICOYS 1120 - 0422-3	PBWP	237	3,500	-			3,500
Bank of America - Bank of America Grant for Vita	VSWP	301	20,000	-			20,000
Third Federal Bank (4060) - VITA	VSWP	302	15,000	-			15,000
Unidos COV 19 Rapid Relief - COVID-19: 8/21-12/21-2	EFWP	332	3,050	-			3,050
American Heart Assoc- Voices for Healthy Kids Travel 2023	EFWP	333	2,000	-			2,000
American Heart Assoc- Voices for Healthy Kids Travel 2024	EFWP	333	2,000	-			2,000
0	-	0	-	-			0
Comcast Foundation - Comcast U4T/STEM (4060)	STEP	440	20,000	(16,667)			3,333
Batchelor Fdn 9-8-2022 to 9-30-23	U4T - HS	481	16,667	(8,549)			8,118
Wells Fargo Foundaton - CWF Grant to support Financial	CFWP	500	35,000	(14,583)			20,417
Truist - IT/Technology Funding	CFWP	500	75,000	(17,167)			57,833
Jim Moran Foundation - \$1,144,500 - \$381.5/year 1	CFWP	503	381,500	(133,677)			247,823
Jim Moran Foundation - Moran \$1,144,500 - \$381.5/year 2	CFWP	503	381,500	-			381,500
Jim Moran Foundation - Moran \$1,144,500 - \$381.5/year 3	CFWP	503	381,500	-			381,500
Community Foundation of Broward - Mitigating Data Issues Program	CFWP	506	17,399	(17,399)			(0)
TK Orange County Community Foundation	CFWP	508	90,055	(50,390)			39,665
Frederick Delucca Original Dates 9-1-2020 to 8-31-21. Started in Jan 2021 thru April 2022	ST	514	0	(0)			(0)
The Annie E. Casey Foundation - Grant - FinCap/CWF	CFWP	515	-	-			0
Jim Moran Foundation Research Grant 1-1-21 to 12-31-22	CFWP	531	19,024	(111)			18,913
American Health Healthy for Life: Initiative	PMWP	535	2,000	-			2,000
The Wawa Foundation - To Support the Comprando Rico y Sano	PBWP	537	1,000	(1,000)			0
UnidosUS - Comprando Rico y Sa - UnidosUS-RICOYS 1120 - 0622-923	PBWP	537	39,243	(32,768)			6,476
Health Foundation Te Ayudo 11-1-2021 - 10-31-2024 Due 1-5-2024	PBW	550	29,294	(29,294)			0
Health Foundation Te Ayudo 11-1-2021 - 10-31-2024 Due 1-5-2025	PBW	550	30,099	(7,830)			22,268
Health Foundation Te Ayudo 11-1-2021 - 10-31-2024 Due 6/30/2022	PBW	550	45,148	-			45,148
Health Foundation Te Ayudo 11-1-2021 - 10-31-2024 Due 6/30/2023	PBW	550	45,148	-			45,148
Health Foundation Te Ayudo 11-1-2021 - 10-31-2024 Due 6-30-2024	PBW	550	45,148	-			45,148
Florida Blue Foundation - GRANT Comp Rico y Sano (7/15/22-7/14/23)	PMWP	551	43,528	(33,070)			10,458
Florida Blue Foundation - Comprando Rico y Sano pmt 2	PMWP	551	85,000	-			85,000
Florida Blue Foundation - CRS pmt #3 ending 7/26	PMWP	551	50,000	-			50,000
Florida Blue Foundation - CRS pmt #4 ending 7/26	PMWP	551	45,000	-			45,000
Florida Blue Foundation - CRS pmt #5 ending 7/26	PMWP	551	40,000	-			40,000
Florida Blue Foundation - CRS pmt #6 ending 7/26	PMWP	551	30,000	-			30,000
Florida Blue Foundation - CRS pmt #7 ending 7/26	PMWP	551	25,000	-			25,000
Florida Blue Foundation - CRS pmt #87 ending 7/26	PMWP	551	25,000	-			25,000
Share Our Strength - No Kid Hungry (Marketing/Advocacy)	CFWP	547	36,702	(13,457)			23,245
Unidos US (Housing)	HCWP	574	5,515	-			5,515
Unidos US (Housing) 511 574	HCWP	511	18,000	(11,888)			6,112
Unidos Wells Keeping People Ho - Housing Counseling 574	HCWP	574	8,000	(9,151)			(1,151)
Unidos US HUD (Housing) 512 575	-	512	32,500	(7,178)			25,322
NALEO Educational Fund - 50% Grant - Final pymt	CZZP	606	22,348	(17,758)			4,590
UnidosUS Comcast Digital Innov - Grant 1st pmt	CZZP	608	3,015	(3,015)			0
UnidosUS Comcast Digital Innov - Grant 2st pmt Digital Innov Citizenship	CZZP	608	10,000	(8,112)			1,888
UnidosUS Comcast Digital Innov - 3rd final pmt Digital Innov Citizenship	CZZP	608	10,000	-			10,000
The William R. Watts Foundatio - Grant - FSP	FSEP	676	5,000	-			5,000
WeCount! - Florida Protecting Immigrant Families (4060)	PAWP	975	10,000	-			10,000
UnidosUs Digital Skills for Li - Grant 1st payment/2ND / 3RD PMT	CFWP	511	16,330	-			16,330
Florida Blue Foundation - GRANT Citizenship	CZZP	610	100,000	(29,791)			70,209
Network for Good in TR per GL	CZZP	156	1,535	-			1,535
			3,041,256	(686,796)			2,354,460

New 2023

TR Grants

Added in 2023							
Protecting Immigrant Families	VITA	302			15,000	(13,378)	1,622
UnidosUS-Robert Wood Johnson F -	PBWP	561			62,000	(15,003)	46,997
Broward County Sheriff's Office - U4T GRANT - LETF	ODEP	167			2,536	(2,536)	-
Early Learning Coalition - ARP - ARPA Grant U4K	UKEP	173			17,887	-	17,887
Jim Moran - Flood Emergency	EFWP	340			30,000	(178)	29,822
Community Broward Fdn	CFWP	506			100,000	-	100,000
Community Broward Fdn	CFWP	506			100,000	-	100,000

Temp Restricted Schedule
For The Five Month Ending May 31, 2023

0 0

Awards Brought Forward to 2021	AREA	CC	December 31, 2022	Increase/ (Decrease)	Additions	Increase/ (Decrease)	May 31, 2023
Community Broward Fdn	CFWP	506			100,000	-	100,000
Wawa - CRS	PBWP	537			1,500	-	1,500
TD Charitable Foundation - Grant to Support FinCap Program	CFWP	500			7,500	-	7,500
up-Citi Community Devel - Workforce development & financial inclusion CWF	CFWP	570			20,000	-	20,000
Community Broward Fdn	EFWP	339			20,000	-	20,000
Fort Lauderdale Rotary 1090 Foundation	UKEP	171			2,500	(1,470)	1,030
					478,923	(32,564)	446,358

\$ 3,041,256 \$ (686,796) \$ 478,923 \$ (32,564) \$ 2,800,819

YTD Satisfaction of Time Restrictions **\$ (719,360)** 2,800,819

HISPANIC UNITY OF FLORIDA, INC.
STATEMENT OF ACTIVITIES - TOTAL
For The Five Month Ending May 31, 2023

	Month Actual	Month Budget	Over (Under)	Year to Date Actual	Year to Date Budget	Over (Under)
Revenues						
Donations - UNR	\$ 8,898	\$ 39,167	\$ (30,269)	\$ 126,800	\$ 195,833	\$ (69,033)
Donations - TR	22,900	91,637	(68,737)	479,323	458,195	21,128
Satisfaction of Restrictions	148,229	118,478	29,751	719,361	592,383	126,978
Fundraising Events	-	6,667	(6,667)	0	33,333	(33,333)
Grant Income	468,109	443,028	25,081	2,341,334	2,215,137	126,197
Interest Income	0	0	0	12,227	0	12,227
Rental Income	4,570	0	4,570	22,849	0	22,849
Voluntary Pre-K	5,759	0	5,759	26,269	0	26,269
Fees & Miscell Income	23,320	26,650	(3,330)	108,644	133,250	(24,606)
Total Revenues	681,785	725,627	(43,842)	3,836,807	3,628,131	208,676
Expenses						
Salaries and benefits	396,133	567,112	(170,979)	2,099,271	2,835,523	(736,252)
Advertising	14,871	3,624	11,247	20,116	18,128	1,988
Bank service charges	714	750	(36)	5,392	3,750	1,642
Building repairs/maint	36,971	10,076	26,895	117,336	50,376	66,960
Depreciation	12,417	12,083	334	62,088	60,417	1,671
Dues Subscriptions	3,407	1,400	2,007	9,845	6,997	2,848
Information Technology	12,262	11,692	570	62,671	58,461	4,210
Database Management System	0	56	(56)	0	281	(281)
Insurance	6,200	6,921	(721)	31,001	34,609	(3,608)
Interest expense	3,556	5,200	(1,644)	22,455	26,000	(3,545)
Licenses and permits	0	403	(403)	0	2,013	(2,013)
Mileage reimbursement	2,285	2,849	(564)	11,532	14,238	(2,706)
Travel/Conference	2,002	1,337	665	11,510	6,685	4,825
Miscellaneous	1	141	(140)	(9)	790	(799)
Office expense	4,606	5,501	(895)	24,883	27,513	(2,630)
Postage and shipping	156	413	(257)	1,949	2,062	(113)
Printing	5,620	3,126	2,494	24,765	15,624	9,141
Professional fees	31,294	18,977	12,317	159,155	94,877	64,278
Program expenses	48,219	45,358	2,861	191,982	226,758	(34,776)
Public relations	572	583	(11)	7,029	2,917	4,112
Rent	5,180	2,233	2,947	21,169	11,167	10,002
Staff events/meetings	(77)	663	(740)	8,179	3,314	4,865
Software	3,500	84	3,416	21,586	420	21,166
Special fundraising events	3,000	2,292	708	3,065	11,458	(8,393)
Staff training and development	5,353	5,011	342	30,746	25,059	5,687
Telephone	6,167	7,523	(1,356)	30,339	37,616	(7,277)
Telephone - Cell/HotSpots	6,472	3,322	3,150	33,470	16,600	16,870
Utilities	3,630	3,578	52	18,920	17,891	1,029
Administrative Cost (net)	0	3	(3)	502	6	496
Worst Case-Admin Net Effect		0	0			
Total Expenses	614,511	722,311	(107,800)	3,030,947.00	3,611,550	(580,603)
Increase (Decrease) in UNR Assets	\$ 67,274	\$ 3,316	\$ 63,958	805,860	\$ 16,581	\$ 789,279

Programs	\$ 1,035,478	0
Support	\$ (229,618)	0
Total	\$ 805,860	0

Increase (Decrease) in UNR Assets \$ 805,860 subtotal

Less:

Net Assets "Released Prior Year"	Without Donor Restrictions	(686,796)
Net Assets "Released Current Year"	Without Donor Restrictions	(32,564)
	YTD Actual Agency Over (Under)	86,500 includes Depreciation \$

Retro Adjustment	Month	Actual	Original	Net adj	
Community Broward Foundation	April	300,000	100,000	200,000	Originally only booked \$100K SB \$300K for 3 yr funding
IT - Technology TR Release	Jan	26,253	3,500	22,753	posted after April run (retro)
Broward County Sheriff's Office - U4T GRANT	Mar	2,536	-	2,536	posted after April run (retro)

HISPANIC UNITY OF FLORIDA, INC.
STATEMENT OF ACTIVITIES - PROGRAMS
For The Five Month Ending May 31, 2023

	Month Actual	Month Budget	Over (Under)	Year to Date Actual	Year to Date Budget	Over (Under)
Revenues						
Donations - UNR	2,945	\$ 8,898	-	20,002	-	20,002
Donations - TR	22,900	\$ 22,900	-	479,323	409,197	70,126
Satisfaction of Restrictions	141,292	\$ 148,229	(6,937)	590,217	463,793	126,424
Grant Income	468,109	\$ 468,109	-	2,341,334	2,215,137	126,197
Rental Income	4,570	\$ 4,570	-	22,849	-	22,849
Voluntary Pre-K	5,759	\$ 5,759	-	26,269	-	26,269
Fees & Miscell Income	23,320	\$ 23,320	-	108,623	133,250	(24,627)
Total Revenues	668,895	681,785	(12,890)	3,588,617	3,221,377	367,240
Expenses						
Salaries and benefits	343,627	\$ 396,133	(52,506)	1,744,367	2,273,803	(529,436)
Advertising	14,621	\$ 14,871	(250)	19,801	12,086	7,715
Building repairs/maint	18,189	\$ 36,971	(18,782)	85,066	1,808	83,258
Depreciation	11,022	\$ 12,417	(1,395)	55,112	-	55,112
Dues Subscriptions	-	\$ 3,407	(3,407)	1,294	-	1,294
Information Technology	11,419	\$ 12,262	(843)	55,752	911	54,841
Insurance	5,673	\$ 6,200	(527)	28,364	-	28,364
Interest expense	4,418	\$ 3,556	862	21,672	-	21,672
Licenses and permits	-	\$ -	-	-	2,013	(2,013)
Mileage reimbursement	2,222	\$ 2,285	(63)	11,242	13,530	(2,288)
Travel/Conference	-	\$ 2,002	(2,002)	-	-	-
Office expense	3,035	\$ 4,606	(1,571)	19,397	27,471	(8,074)
Postage and shipping	333	\$ 156	177	1,573	756	817
Printing	7,682	\$ 5,620	2,062	25,233	2,555	22,678
Professional fees	10,391	\$ 31,294	(20,903)	42,957	32,464	10,493
Program expenses	48,219	\$ 48,219	-	187,982	225,313	(37,331)
Rent	6,043	\$ 5,180	863	20,279	-	20,279
Software	3,500	\$ 3,500	5,000	21,586	420	5,000
Staff training and development	5,283	\$ 5,353	(70)	23,117	14,225	8,892
Telephone	5,527	\$ 6,167	(640)	27,242	8,656	18,586
Telephone - Cell/HotSpots	6,110	\$ 6,472	(362)	29,959	10,535	19,424
Utilities	3,044	\$ 3,630	(586)	16,191	-	16,191
Administrative Cost (net)	19,103	\$ -	19,103	114,953	375,177	(260,224)
<i>Worst Case-Admin Net Effect</i>	-	\$ -	-	-	-	-
Total Expenses	529,461	610,301	(80,840)	2,553,139	3,001,723	(448,584)
Increase (Decrease) in UNR Assets	139,434	71,484	67,950	1,035,478	219,654	815,824

Toward Administrative and Fixed Costs

\$ 336,484

HISPANIC UNITY OF FLORIDA, INC.
STATEMENT OF ACTIVITIES - SUPPORT
For The Five Month Ending May 31, 2023

	Month Actual	Month Budget	Over (Under)	Year to Date	Year to Date	Over (Under)
Revenues						
Donations - UNR	\$ 5,953	\$ 39,167	(\$ 33,214)	\$ 106,798	\$ 195,833	(\$ 89,035)
Donations - TR	\$ -	\$ 9,800	(\$ 9,800)	\$ 0	\$ 48,998	(\$ 48,998)
Satisfaction of Restrictions	\$ 6,937	\$ 25,718	(\$ 18,781)	\$ 129,144	\$ 128,590	\$ 554
Fundraising Events	\$ -	\$ 6,667	(\$ 6,667)	\$ 0	\$ 33,333	(\$ 33,333)
Grant Income	\$ -	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
Interest Income	\$ -	\$ 0	\$ 0	\$ 12,227	\$ 0	\$ 12,227
Rental Income	\$ -	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
Voluntary Pre-K	\$ -	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
Fees & Miscell Income	\$ -	\$ 0	\$ 0	\$ 21	\$ 0	\$ 21
InKind - Services/Goods	\$ -	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
Total Revenues	12,890	81,352	(68,462)	248,190	406,754	(158,564)
Expenses						
Salaries and benefits	\$ 52,506	\$ 112,344	(\$ 59,838)	\$ 354,904	\$ 561,720	(\$ 206,816)
Advertising	\$ 250	\$ 1,208	(\$ 958)	\$ 315	\$ 6,042	(\$ 5,727)
Bad debt expense	\$ -	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
Bank service charges	\$ 714	\$ 750	(\$ 36)	\$ 5,392	\$ 3,750	\$ 1,642
Building repairs/maint	\$ 18,782	\$ 9,714	\$ 9,068	\$ 32,270	\$ 48,568	(\$ 16,298)
Depreciation	\$ 1,395	\$ 12,083	(\$ 10,688)	\$ 6,976	\$ 60,417	(\$ 53,441)
Dues Subscriptions	\$ 3,407	\$ 1,400	\$ 2,007	\$ 8,551	\$ 6,997	\$ 1,554
Information Technology	\$ 843	\$ 11,510	(\$ 10,667)	\$ 6,919	\$ 57,550	(\$ 50,631)
Database Mgmt System	\$ -	\$ 4,500	(\$ 4,500)	\$ 0	\$ 22,500	(\$ 22,500)
Database Management System	\$ -	\$ 56	(\$ 56)	\$ 0	\$ 281	(\$ 281)
InKind - Goods/Services	\$ -	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
Insurance	\$ 527	\$ 6,921	(\$ 6,394)	\$ 2,637	\$ 34,609	(\$ 31,972)
Interest expense	\$ (862)	\$ 5,200	(\$ 6,062)	\$ 783	\$ 26,000	(\$ 25,217)
Licenses and permits	\$ -	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
Lobbying	\$ -	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
Loss on Disposal of Assets	\$ -	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
Mileage reimbursement	\$ 63	\$ 142	(\$ 79)	\$ 290	\$ 708	(\$ 418)
Travel/Conference	\$ 2,002	\$ 1,337	\$ 665	\$ 11,510	\$ 6,685	\$ 4,825
Miscellaneous	\$ 1	(\$ 21)	\$ 22	(\$ 9)	(\$ 21)	\$ 12
Office expense	\$ 1,571	\$ 8	\$ 1,563	\$ 5,486	\$ 42	\$ 5,444
Printing	\$ (2,062)	\$ 2,614	(\$ 4,676)	(\$ 468)	\$ 13,069	(\$ 13,537)
Professional fees	\$ 20,903	\$ 12,483	\$ 8,420	\$ 116,198	\$ 62,413	\$ 53,785
Program expenses	\$ -	\$ 289	(\$ 289)	\$ 4,000	\$ 1,445	\$ 2,555
Public relations	\$ 572	\$ 583	(\$ 11)	\$ 7,029	\$ 2,917	\$ 4,112
Rent	\$ (863)	\$ 2,233	(\$ 3,096)	\$ 890	\$ 11,167	(\$ 10,277)
Software	\$ -	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
Special fundraising events	\$ 3,000	\$ 2,292	\$ 708	\$ 3,065	\$ 11,458	(\$ 8,393)
Staff events/meetings	\$ (77)	\$ 663	(\$ 740)	\$ 8,179	\$ 3,314	\$ 4,865
Staff training and development	\$ 70	\$ 2,166	(\$ 2,096)	\$ 7,629	\$ 10,834	(\$ 3,205)
Telephone	\$ 640	\$ 5,792	(\$ 5,152)	\$ 3,097	\$ 28,960	(\$ 25,863)
Telephone - Cell/HotSpots	\$ 362	\$ 1,213	(\$ 851)	\$ 3,511	\$ 6,065	(\$ 2,554)
Utilities	\$ 586	\$ 3,578	(\$ 2,992)	\$ 2,729	\$ 17,891	(\$ 15,162)
Administrative Cost (net)	\$ (19,103)	(\$ 75,034)	\$ 55,931	(\$ 114,451)	(\$ 375,171)	\$ 260,720
<i>Worst Case-Admin Net Effect</i>	<i>0</i>	<i>0</i>	<i>0</i>	<i>0</i>	<i>0</i>	<i>0</i>
Total Expenses	85,050	126,286	(41,236)	477,808	631,516	(153,708)
Increase (Decrease) in UNR Assets	(\$ 72,160)	(\$ 44,934)	(\$ 27,226)	(\$ 229,618)	(\$ 224,762)	(\$ 4,856)

HISPANIC UNITY OF FLORIDA, INC.

FINANCIAL STATEMENTS

For the Six Months Ending June 30, 2023
(WITH COMPARATIVE TOTALS FOR THE YEAR ENDED DECEMBER 31, 2022)

Prepared by: L. Romero 8/12/23
FOR REVIEW BY CEO/FINANCE COMMITTEE
SOURCE: SAGE PEACHTREE @ 06/30/23 / TR SCHEDULE

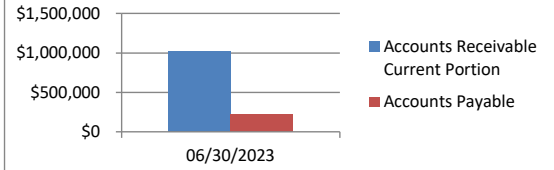
06/30/2023 Dashboard

Revenue YTD Compared to Previous YTD

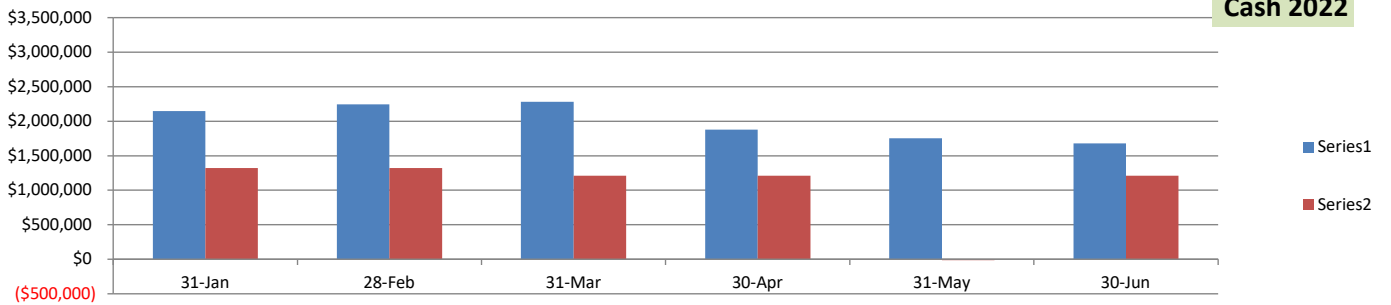
06/30/2023

	Revenue YTD as of 6/30/2023	Revenue YTD as of 6/30/2022	Year Over Year Chng
Unrestricted Revenue	\$4,360,594	\$2,471,740	\$1,888,854
Restricted Revenue	(\$516,323)	(\$545,913)	\$29,590
Total Revenue	\$3,844,271	\$1,925,827	\$1,918,444

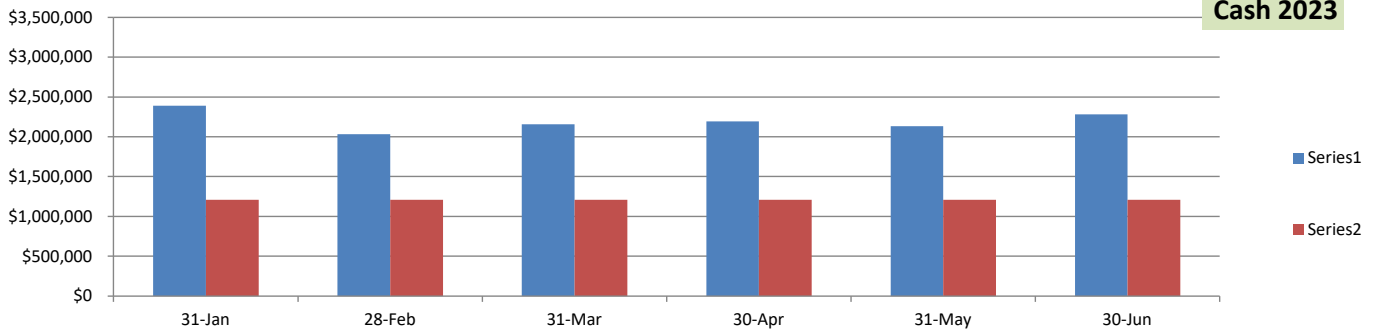
Accounts Receivable Vs Payables June 2023



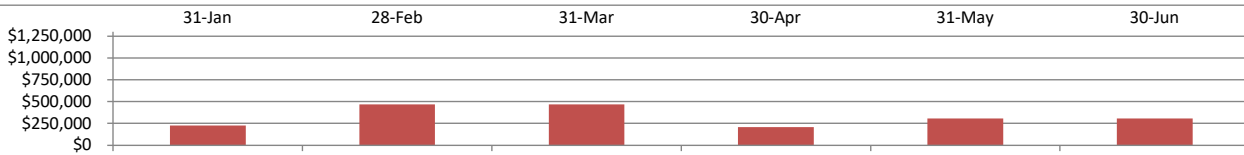
Cash 2022



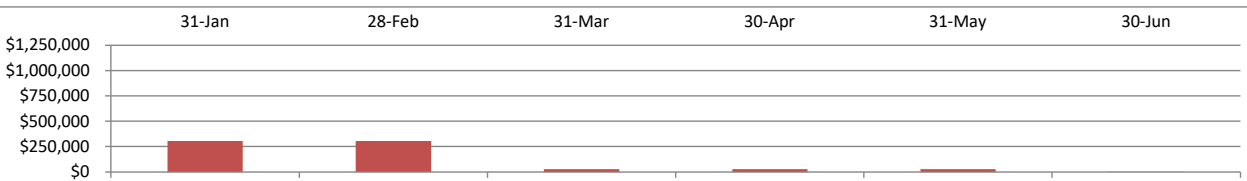
Cash 2023



Line of Credit Usage 2022



Line of Credit Usage 2023



Hispanic Unity of Florida, Inc.

Notes to Financials

06/30/2023

UNR Net Assets

Preliminary

Reconciliation of UNR Net Assets:

1 Gain/(Loss) From Program Operation	1,275,415
2 Gain/(Loss) from Support Services	(249,864)
Inc(Dec) in UNR Net Assets	<u>\$ 1,025,551</u>

Includes:

From Net Assets "Released Prior Year" (946,097) for current year operations

From Net Assets "Released Current Year" (148,296)

Subtotal Released PY & CY (1,094,393)

YTD Actual Agency Over (Under) (68,842)

The year-to-date projected operating surplus was \$20K. Our year-to-date actual was \$69K - includes prior year releases

1) Development YTD had a unfavorable budget variance \$90K

2) Programs YTD had a favorable variance of \$1.01M, includes Donor with Restrictions released totaling \$968K

3) Admin YTD had a favorable budget variance of \$110K, includes Donor with Restrictions released totaling \$126K

Pending impact on revenues (net)

Pending review more releases for capitalized equipment

Interest to be earned for MM 4% starting 6/30 re-negotiated

Savings due to operations starting later 1/2 of 2023

Cash

Year to date cash decreased by \$453K as a result of the following activities:

\$ (64,843) Inc/(Dec) in Net Assets
<u>55,426 Adjustments to reconcile increase (decrease) in net assets</u>
(9,418) Net cash provided (consumed) by operating activities
(22,446) Investing Activities
(314,335) Financing Activities
<u>\$ (346,199) Inc/(Dec) in Cash</u>

HISPANIC UNITY OF FLORIDA, INC.
STATEMENT OF FINANCIAL POSITION
For the Six Months Ending June 30, 2023
(WITH COMPARATIVE TOTALS AS OF DECEMBER 31, 2022)

	<u>2023</u>	<u>2022</u>
<u>ASSETS</u>		
Current Assets		
Cash	2,282,815	\$ 2,629,014
Grants receivable, net	837,254	816,742
Unconditional promises to give, net	182,469	244,028
Prepaid expenses	<u>60,516</u>	<u>31,666</u>
Total Current Assets	<u>3,363,054</u>	<u>3,721,450</u>
Non-Current Assets		
Long term conditional promises to give	1,156,944	1,156,944
Property and equipment, net	1,129,500	1,181,560
Deposits and Other Assets	<u>33,010</u>	<u>33,249</u>
Total Non-Current Assets	<u>2,319,454</u>	<u>2,371,753</u>
Total Assets	<u>5,682,508</u>	<u>\$ 6,093,203</u>
<u>LIABILITIES AND NET ASSETS</u>		
Current Liabilities		
Accounts payable and accrued expenses	223,202	\$ 254,719
Mortgage payable, current	17,889	19,705
Line of credit	<u>218</u>	<u>306,339</u>
Total Current Liabilities	<u>241,309</u>	<u>580,763</u>
Noncurrent Liabilities		
Mortgage payable, net of current portion	<u>730,967</u>	<u>737,365</u>
Total Non-Current Liabilities	<u>730,967</u>	<u>737,365</u>
Total Liabilities	<u>972,276</u>	<u>1,318,128</u>
Net Assets		
Without Donor Restrictions	2,185,299	1,805,376
With Donor Restrictions	<u>2,524,933</u>	<u>2,969,699</u>
Total Net Assets	<u>4,710,233</u>	<u>4,775,075</u>
Total Liabilities and Net Assets	<u>5,682,508</u>	<u>\$ 6,093,203</u>

HISPANIC UNITY OF FLORIDA, INC.
STATEMENT OF ACTIVITIES
For the Six Months Ending June 30, 2023
(WITH COMPARATIVE TOTALS FOR THE YEAR ENDED DECEMBER 31, 2022)

					2022
		Without	With	Total	Total
		Donor Restrictions	Donor Restrictions		
Revenues and Other Support:					
Contributions	Contributions, with donor r \$	188,572	\$ 584,466	\$ 773,038	\$ 3,495,781
Special events		10,000	-	10,000	-
Grants from government agencies		2,627,716	-	2,627,716	4,575,834
Other grants and fees		230,980	-	230,980	534,236
Miscellaneous	Miscellaneous, with donor	202,129	\$ 408	202,537	277,239
Donations, in-kind		-	-	-	20,454
Net assets released from restrictions:					
	Satisfaction of time restrictions	1,094,393	(1,094,393)	-	-
	Satisfaction of program and purpose restrictions	6,804	(6,804)	-	-
Total Revenues and Other Support		4,360,594	(516,323)	3,844,271	8,903,544
Expenses (Functional)					
Program services		3,600,411	-	3,600,411	7,338,223
Management and general		273,615	-	273,615	368,317
Fundraising		39,088	-	39,088	42,657
Total Expenses		3,913,114	-	3,913,114	7,749,197
Change in Net Assets		447,480	(516,323)	(68,843)	1,154,347
Net Assets - Beginning of Year		1,737,819	3,041,256	4,779,075	3,620,728
Net Assets - End of Year		2,185,299	2,524,933	4,710,232	4,775,075
			w/ all releases		

HISPANIC UNITY OF FLORIDA, INC.
STATEMENT OF CASH FLOWS
For the Six Months Ending June 30, 2023
(WITH COMPARATIVE TOTALS FOR THE YEAR ENDED DECEMBER 31, 2022)

	<u>2023</u>	<u>2022</u>
Cash Flows from Operating Activities		
Increase (decrease) in net assets	\$ (64,843)	\$ 1,154,347
Adjustments to reconcile increase (decrease) in net assets to cash provided by operating activities:		
Depreciation	74,745	140,009
Provision for uncollectible promises to give	-	-
Changes in assets and liabilities		
(Increase) decrease in grants receivable	(20,512)	19,249
(Increase) decrease in unconditional promises to give	61,559	(951,059)
(Increase) decrease in prepaid expenses	(28,851)	(6,446)
(Increase) decrease in security deposits and other assets	-	476
Increase (decrease) in accounts payable and accrued expenses	<u>(31,517)</u>	<u>52,658</u>
Total adjustments	<u>55,426</u>	<u>(745,113)</u>
Net Cash Provided by Operating Activities	<u>(9,418)</u>	<u>409,234</u>
Cash Flows from Investing Activities		
Acquisition of property and equipment, net of retirements	<u>(22,446)</u>	<u>(23,311)</u>
Net Cash (Used In) Investing Activities	<u>(22,446)</u>	<u>(23,311)</u>
Cash Flows from Financing Activities		
Net Advance (Repayment) of LOC	(306,121)	295,000
Borrowing (Repayment) of mortgage	<u>(8,214)</u>	<u>(18,656)</u>
Net Cash Provided by Financing Activities	<u>(314,335)</u>	<u>276,344</u>
Increase (decrease) in Cash	(346,199)	662,267
Cash - Beginning of Year	<u>2,629,014</u>	<u>1,966,747</u>
Cash - End of Year	<u>\$ 2,282,815</u>	<u>\$ 2,629,014</u>

Cash Detail
As of 06/30/2023

Without Donor Restrictions and With Donor Restrictions Cash:

1010-000AAAS	Bank of America	Operating	51,880	
1025-000AAAS	BB&T	Payroll	4,565	
1026-000AAAS	BB&T	Operating	286,163	
1000-000AAAS	Petty Cash	Imprest	500	
1028-000AAAS	BB&T	Operating	478,279	*New
1023-000AAAs	BB&T	Asset Reserve Fund	134,074	
1022-000AAAS	BB&T	Reserve Fund	117,382	1,072,845 Without Donor Restrictions
1021-000AAAS	BB&T - Money Market	Opportunity Fund	510,288	
1024-000AAAS	BB&T - Money Market	Grantor Funding	699,682	1,209,970 With Donor Restrictions

\$	2,282,815	TOTAL CASH
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Temp Restricted Schedule
For the Six Months Ending June 30, 2023

0 0

	AREA	CC	December 31, 2022	Increase/ (Decrease)	Additions	Increase/ (Decrease)	June 30, 2023
Awards Brought Forward to 2021							
Third Federal Bank (4060) - General	UUDS	000	50,000	(50,000)			0
TJMF - 9-01-18 - 8-31-23	Admin	000	130,170	(60,000)			70,170
Kresge Foundation (The) - Kresge Foundation - Database	YDEP	004	186,000	(79,924)			106,076
Unidos Medic Grant	AAAS	013	4,000	(4,000)			0
Unidos Policy & Advocacy Medic - ACA final report due 8/8/22	AAAS	013	5,000	(12,484)			(7,484)
Unidos Policy & Advocacy Medic - MED-ACA 1122-0823-1	AAAS	013	14,500	-			14,500
UnidosUS - Citizenship Savings - Grant Civic Engagement Citizenship	CZZP	156	3,750	-			3,750
City of Hollywood Police Depar - LETF - U4T High School Grant	ODEP	167	10,000	(9,871)			129
Tate Foundation 2023 Community Fdt	UKEP	173	20,000	(20,000)			0
Tate Foundation 2024 Community Fdt	UKEP	173	20,000	-			20,000
Tate Foundation 2025 Community Fdt	UKEP	174	20,000	-			20,000
UnidosUS - Comprando Rico y Sa - UnidosUS-RICOYS 1120 - 0422-3	PBWP	237	3,500	-			3,500
Bank of America - Bank of America Grant for Vita	VSWP	301	20,000	-			20,000
Third Federal Bank (4060) - VITA	VSWP	302	15,000	(4,331)			10,669
Unidos COV 19 Rapid Relief - COVID-19: 8/21- 12/21-2	EFWP	332	3,050	-			3,050
American Heart Assoc- Voices for Healthy Kids Travel 2023	EFWP	333	2,000	-			2,000
American Heart Assoc- Voices for Healthy Kids Travel 2024	EFWP	333	2,000	-			2,000
Comcast Foundation - Comcast U4T/STEM (4060)	STEP	440	20,000	(20,000)			0
Batchelor Fdn 9-8-2022 to 9-30-23	U4T - HS	481	16,667	(10,657)			6,010
Wells Fargo Foundaton - CWF Grant to support Financial	CFWP	500	35,000	(17,500)			17,500
Truist - IT/Technology Funding	CFWP	500	75,000	(17,167)			57,833
Jim Moran Foundation - \$1,144,500 - \$381.5/year 1	CFWP	503	381,500	(117,750)			263,750
Jim Moran Foundation - Moran \$1,144,500 - \$381.5/year 2	CFWP	503	381,500	-			381,500
Jim Moran Foundation - Moran \$1,144,500 - \$381.5/year 3	CFWP	503	381,500	-			381,500
Community Foundation of Broward - Mitigating Data Issues Program	CFWP	506	17,399	(17,399)			(0)
TK Orange County Community Foundation	CFWP	508	90,055	(77,373)			12,682
JP Morgan Chase Foundation - Workforce 2022-2023 General Ops	CFWP	510	140,146	(106,986)			33,160
Frederick Delucca 9/22-8/23	CFWP	514	114,939	(59,903)			55,035
Jim Moran Foundation Research Grant 1-1-21 to 12-31-22	CFWP	531	19,024	(111)			18,913
American Health Healthy for Life: Initiative	PMWP	535	2,000	-			2,000
The Wawa Foundation - To Support the Comprando Rico y Sano	PBWP	537	1,000	(1,000)			0
UnidosUS - Comprando Rico y Sa - UnidosUS-RICOYS 1120 - 0622-923	PBWP	537	39,243	(30,332)			8,911
Health Foundation Te Ayudo 11-1-2021 - 10-31-2024 Due 1-5-2024	PBW	550	29,294	(29,294)			0
Health Foundation Te Ayudo 11-1-2021 - 10-31-2024 Due 1-5-2025	PBW	550	30,099	(17,437)			12,662
Health Foundation Te Ayudo 11-1-2021 - 10-31-2024 Due 6/30/2022	PBW	550	45,148	-			45,148
Health Foundation Te Ayudo 11-1-2021 - 10-31-2024 Due 6/30/2023	PBW	550	45,148	-			45,148
Health Foundation Te Ayudo 11-1-2021 - 10-31-2024 Due 6-30-2024	PBW	550	45,148	-			45,148
Florida Blue Foundation - GRANT Comp Rico y Sano (7/15/22-7/14/23)	PMWP	551	43,528	(43,528)			(0)
Florida Blue Foundation - Comprando Rico y Sano pmt 2	PMWP	551	85,000	(2,929)			82,071
Florida Blue Foundation - CRS pmt #3 ending 7/26	PMWP	551	50,000	-			50,000
Florida Blue Foundation - CRS pmt #4 ending 7/26	PMWP	551	45,000	-			45,000
Florida Blue Foundation - CRS pmt #5 ending 7/26	PMWP	551	40,000	-			40,000
Florida Blue Foundation - CRS pmt #6 ending 7/26	PMWP	551	30,000	-			30,000
Florida Blue Foundation - CRS pmt #7 ending 7/26	PMWP	551	25,000	-			25,000
Florida Blue Foundation - CRS pmt #87 ending 7/26	PMWP	551	25,000	-			25,000
Share Our Strength - No Kid Hungry (Marketing/Advocacy)	CFWP	547	36,702	(14,324)			22,378
Unidos US (Housing)	HCWP	574	5,515	(4,010)			1,505
Unidos US (Housing) 511 574	HCWP	511	18,000	(13,906)			4,094
Unidos Wells Keeping People Ho - Housing Counseling 574	HCWP	574	8,000	(9,151)			(1,151)
Unidos US HUD (Housing) 512 575	-	512	32,500	(9,167)			23,333
NALEO Educational Fund - 50% Grant - Final pymt	CZZP	606	22,348	(22,225)			123
UnidosUS Comcast Digital Innov - Grant 1st pmt	CZZP	608	3,015	(3,015)			0
UnidosUS Comcast Digital Innov - Grant 2st pmt Digital Innov Citizenship	CZZP	608	10,000	(8,112)			1,888
UnidosUS Comcast Digital Innov - 3rd final pmt Digital Innov Citizenship	CZZP	608	10,000	-			10,000
The William R. Watts Foundatio - Grant - FSP	FSEP	676	5,000	(5,000)			0
WeCount! - Florida Protecting Immigrant Families (4060)	PAWP	975	10,000	(10,000)			0
UnidosUs Digital Skills for Li - Grant 1st payment/2ND / 3RD PMT	CFWP	511	16,330	-			16,330
Florida Blue Foundation - GRANT Citizenship	CZZP	610	100,000	(37,207)			62,793
Network for Good in TR per GL	CZZP	156	1,535	-			1,535
			3,041,256	(946,097)			2,095,160

New 2023

TR Grants

Added in 2023	0	0	0				
Protecting Immigrant Families		VITA	302		15,000	(13,378)	1,622
UnidosUS-Robert Wood Johnson F -		PBWP	561		62,000	(21,703)	40,297
Broward County Sheriff's Offic - U4T GRANT - LETF		ODEP	167		2,536	(2,536)	-
Early Learning Coalition - ARP - ARPA Grant U4K		UKEP	173		17,887	-	17,887
Jim Moran - Flood Emergency		EFWP	340		30,000	(19,899)	10,101
Community Broward Fdn		CFWP	506		300,000	(4,310)	295,690
Wawa - CRS		PBWP	537		1,500	-	1,500

Temp Restricted Schedule
For the Six Months Ending June 30, 2023

0 0

	AREA	CC	December 31, 2022	Increase/ (Decrease)	Additions	Increase/ (Decrease)	June 30, 2023
Awards Brought Forward to 2021							
TD Charitable Foundation - Grant to Support FinCap Program	CFWP	500			7,500	-	7,500
up-Citi Community Devel - Workforce development & financial inclusion CWF	CFWP	570			20,000	-	20,000
Community Broward Fdn	EFWP	339			20,000	-	20,000
Fort Lauderdale Rotary 1090 Foundation	UKEP	171			2,500	(1,470)	1,030
Early Learning Coalition - ARP - ARPA Grant U4K	UKEP	173			14,147	-	14,147
Bank of America - Bank of America Grant for Vita	VSWP	301			20,000	(20,000)	-
TIAA Bank - Grant from TIAA Bank for CWF	CFWP	500			5,000	(5,000)	-
Wells Fargo Foundaton - CWF Grant to support Financial	CFWP	500			35,000	(35,000)	-
Capital One - Grant for CWF- Financial Capability and Wealth Building	HCWP	570			25,000	(25,000)	-
					578,070	(148,296)	429,774

\$ 3,041,256 \$ (946,097) \$ 578,070 \$ (148,296) \$ 2,524,933

YTD Satisfaction of Time Restrictions **\$ (1,094,393)** 2,524,933

HISPANIC UNITY OF FLORIDA, INC.
STATEMENT OF ACTIVITIES - TOTAL
For the Six Months Ending June 30, 2023

	Month Actual	Month Budget	Over (Under)	Year to Date Actual	Year to Date Budget	Over (Under)
Revenues						
Donations - UNR	\$ 60,772	\$ 39,167	\$ 21,605	\$ 188,572	\$ 235,000	\$ (46,428)
Donations - TR	105,143	91,637	13,506	584,466	549,835	34,631
Satisfaction of Restrictions	330,701	118,478	212,223	1,090,061	710,859	379,202
Fundraising Events	10,000.00	6,667	3,333	10,000	40,000	(30,000)
Grant Income	514,224	443,028	71,196	2,858,697	2,658,164	200,533
Interest Income	295	0	295	12,544	0	12,544
Rental Income	4,707	0	4,707	27,556	0	27,556
Voluntary Pre-K	7,563	0	7,563	33,833	0	33,833
Fees & Miscell Income	19,960	26,650	(6,690)	128,604	159,900	(31,296)
Total Revenues	1,053,365	725,627	327,738	4,934,333	4,353,758	580,575
Expenses						
Salaries and benefits	635,765	567,112	68,653	2,735,444	3,402,626	(667,182)
Advertising	26	3,624	(3,598)	20,141	21,754	(1,613)
Bank service charges	2,846	750	2,096	8,439	4,500	3,939
Building repairs/maint	19,360	10,076	9,284	136,694	60,451	76,243
Depreciation	12,417	12,083	334	74,508	72,500	2,008
Dues Subscriptions	930	1,400	(470)	10,775	8,397	2,378
Information Technology	17,534	11,692	5,842	80,203	70,153	10,050
Database Management System	0	56	(56)	0	338	(338)
Insurance	6,200	6,921	(721)	37,199	41,529	(4,330)
Interest expense	5,129	5,200	(71)	27,586	31,200	(3,614)
Licenses and permits	4,894	403	4,491	4,894	2,415	2,479
Mileage reimbursement	2,918	2,849	69	15,559	17,086	(1,527)
Travel/Conference	2,810	1,337	1,473	14,320	8,021	6,299
Miscellaneous	(4)	141	(145)	1	958	(957)
Office expense	3,171	5,501	(2,330)	28,554	33,014	(4,460)
Postage and shipping	39	413	(374)	1,986	2,475	(489)
Printing	3,542	3,126	416	28,305	18,749	9,556
Professional fees	35,513	18,977	16,536	206,668	113,856	92,812
Program expenses	86,199	45,358	40,841	278,180	272,106	6,074
Public relations	0	583	(583)	7,040	3,500	3,540
Rent	3,233	2,233	1,000	24,399	13,400	10,999
Staff events/meetings	41	663	(622)	8,220	3,978	4,242
Software	3,500	84	3,416	25,086	504	24,582
Special fundraising events	0	2,292	(2,292)	3,065	13,750	(10,685)
Staff training and development	2,211	5,011	(2,800)	32,957	30,071	2,886
Telephone	5,642	7,523	(1,881)	35,983	45,139	(9,156)
Telephone - Cell/HotSpots	6,271	3,322	2,949	39,739	19,920	19,819
Utilities	3,917	3,578	339	22,837	21,469	1,368
Administrative Cost (net)	(1)	3	(4)	0	2	(2)
<i>Worst Case-Admin Net Effect</i>		0	0			
Total Expenses	864,103	722,311	141,792	3,908,782.00	4,333,861	(425,079)
Increase (Decrease) in UNR Assets	\$ 189,262	\$ 3,316	\$ 185,946	1,025,551	\$ 19,897	\$ 1,005,654

Programs	\$ 1,275,415	0
Support	\$ (249,864)	0
Total	\$ 1,025,551	0

Increase (Decrease) in UNR Assets \$ 1,025,551 subtotal

Less:

Net Assets "Released Prior Year"	Without Donor Restrictions	(946,097)
Net Assets "Released Current Year"	Without Donor Restrictions	(148,296)
	YTD Actual Agency Deficit	(68,842) includes Depreciation \$

HISPANIC UNITY OF FLORIDA, INC.
STATEMENT OF ACTIVITIES - PROGRAMS
For the Six Months Ending June 30, 2023

	Month Actual	Month Budget	Over (Under)	Year to Date Actual	Year to Date Budget	Over (Under)
Revenues						
Donations - UNR		-	-	31,012	-	31,012
Donations - TR	105,143	81,837	23,306	584,466	491,037	93,429
Satisfaction of Restrictions	264,069	92,760	171,309	894,285	556,551	337,734
Grant Income	514,224	443,028	71,196	2,858,697	2,658,164	200,533
Rental Income	4,707	-	4,707	27,556	-	27,556
Voluntary Pre-K	7,563	-	7,563	33,833	-	33,833
Fees & Miscell Income	19,960	26,650	(6,690)	128,583	159,900	(31,317)
Total Revenues	915,666	644,275	271,391	4,558,432	3,865,652	692,780
Expenses						
Salaries and benefits	511,441	454,768	56,673	2,261,884	2,728,566	(466,682)
Advertising	26	2,416	(2,390)	19,826	14,504	5,322
Building repairs/maint	16,719	362	16,357	101,784	2,169	99,615
Depreciation	11,022	-	11,022	66,135	-	66,135
Dues Subscriptions	110	-	110	1,404	-	1,404
Information Technology	12,672	182	12,490	68,786	1,093	67,693
Insurance	5,673	-	5,673	34,037	-	34,037
Interest expense	4,418	-	4,418	26,092	-	26,092
Licenses and permits	-	403	(403)	-	2,415	(2,415)
Mileage reimbursement	2,628	2,707	(79)	13,870	16,236	(2,366)
Travel/Conference	-	-	-	-	-	-
Office expense	2,281	5,493	(3,212)	22,178	32,964	(10,786)
Postage and shipping	241	151	90	1,812	907	905
Printing	5,687	512	5,175	31,026	3,066	27,960
Professional fees	233	6,494	(6,261)	43,190	38,961	4,229
Program expenses	86,199	45,069	41,130	274,180	270,372	3,808
Rent	5,516	-	5,516	25,992	-	25,992
Software	5,000	-	5,000	25,086	-	5,000
Staff training and development	2,061	2,845	(784)	25,178	17,071	8,107
Telephone	5,606	1,731	3,875	32,928	10,387	22,541
Telephone - Cell/HotSpots	7,403	2,109	5,294	37,419	12,642	24,777
Utilities	3,693	-	3,693	20,419	-	20,419
Administrative Cost (net)	38,059	75,037	(36,978)	149,791	450,207	(300,416)
<i>Worst Case-Admin Net Effect</i>	-	-	-	-	-	-
Total Expenses	726,688	600,279	126,409	3,283,017	3,601,560	(318,543)
Increase (Decrease) in UNR Assets	188,978	43,996	144,982	1,275,415	264,092	1,011,323

Toward Administrative and Fixed Costs

\$ 1,684,426

HISPANIC UNITY OF FLORIDA, INC.
STATEMENT OF ACTIVITIES - SUPPORT
For the Six Months Ending June 30, 2023

	Month Actual	Month Budget	Over (Under)	Year to Date Actual	Year to Date Budget	Over (Under)
Revenues						
Donations - UNR	\$ 50,762	\$ 39,167	\$ 11,595	\$ 157,560	\$ 235,000	(\$ 77,440)
Donations - TR	0	9,800	(9,800)	0	58,798	(58,798)
Satisfaction of Restrictions	66,632	25,718	40,914	195,776	154,308	41,468
Fundraising Events	10,000	6,667	3,333	10,000	40,000	(30,000)
Grant Income	0	0	0	0	0	-
Interest Income	295	0	295	12,544	0	12,544
Rental Income	0	0	0	0	0	-
Voluntary Pre-K	0	0	0	0	0	-
Fees & Miscell Income	0	0	0	21	0	21
Total Revenues	127,689	81,352	46,337	375,901	488,106	(112,205)
Expenses						
Salaries and benefits	124,324	112,344	11,980	473,560	674,060	(200,500)
Advertising	0	1,208	(1,208)	315	7,250	(6,935)
Bank service charges	2,846	750	2,096	8,439	4,500	3,939
Building repairs/maint	2,641	9,714	(7,073)	34,910	58,282	(23,372)
Depreciation	1,395	12,083	(10,688)	8,373	72,500	(64,127)
Dues Subscriptions	820	1,400	(580)	9,371	8,397	974
Information Technology	4,862	11,510	(6,648)	11,417	69,060	(57,643)
Insurance	527	6,921	(6,394)	3,162	41,529	(38,367)
Interest expense	711	5,200	(4,489)	1,494	31,200	(29,706)
Licenses and permits	4,894	0	4,894	4,894	0	4,894
Lobbying	0	0	0	0	0	0
Mileage reimbursement	290	142	148	1,689	850	839
Travel/Conference	2,810	1,337	1,473	14,320	8,021	6,299
Miscellaneous	(4)	(21)	17	1	(15)	16
Office expense	890	8	882	6,376	50	6,326
Postage and shipping	(202)	262	(464)	174	1,568	(1,394)
Printing	(2,145)	2,614	(4,759)	(2,721)	15,683	(18,404)
Professional fees	35,280	12,483	22,797	163,478	74,895	88,583
Program expenses	0	289	(289)	4,000	1,734	2,266
Public relations	0	583	(583)	7,040	3,500	3,540
Rent	(2,283)	2,233	(4,516)	(1,593)	13,400	(14,993)
Special fundraising events	0	2,292	(2,292)	3,065	13,750	(10,685)
Staff events/meetings	41	663	(622)	8,220	3,978	4,242
Staff training and development	150	2,166	(2,016)	7,779	13,000	(5,221)
Telephone	36	5,792	(5,756)	3,055	34,752	(31,697)
Telephone - Cell/HotSpots	(1,132)	1,213	(2,345)	2,320	7,278	(4,958)
Utilities	224	3,578	(3,354)	2,418	21,469	(19,051)
Administrative Cost (net)	(38,060)	(75,034)	36,974	(149,791)	(450,205)	300,414
Worst Case-Admin Net Effect	0	0	0	0	0	0
Total Expenses	138,915	121,730	17,185	625,765	730,486	(104,721)
Increase (Decrease) in UNR Assets	(\$ 11,226)	(\$ 40,378)	\$ 29,152	(\$ 249,864)	(\$ 242,380)	(\$ 7,484)

**Audit Committee Meeting
MINUTES
Tuesday, June 20, 2023**

Attendance: Dan Herz, Giselle Cushing, Christian Reyes, Andrew Fierman (CFLG), Leonor Romero, Felipe Pinzon and Felina Furer

Excused:

Absent:

Call to Order/ Roll Call

Began at 10:05 AM

During the meeting, Andrew Fierman, the partner at CFLG overseeing Hispanic Unity of Florida's (HUF) 2022 Audit, presented a comprehensive review of the Auditor's report. He emphasized that the Auditor's opinion regarding HUF's financials is pristine. Total assets amounted to \$6 million+, displaying a \$1.5 million increase primarily due to a surge in cash reserves. Liabilities witnessed a \$135k+ increase. The total revenue was noted at \$2.4 million. However, expenses exceeded revenue at \$7.7 million, signaling a \$1 million rise. Notably, the Statement of Functional Expenses highlighted an increase in salaries and consultant fees. On a positive note, the Statement of Cash Flow depicted an overall increase in cash. Andrew noted significant changes in accounting disclosures this year, including the inclusion of capital leases in the balance sheet, while there were no notable shifts in significant leases. Broward School Board occupies space at 5811 Johnson St, and the lease was duly listed. Additionally, Andrew reported that the Federal single audit identified no instances of noncompliance or discrepancies. Given HUF's receipt of over \$750k in government funding, an additional report was required, and it received a clean assessment. The communication to those in charge letter affirmed a smooth reporting process without any difficulties or discrepancies with management.

Leonor Romero informed the attendees that she, along with Lisette Rodriguez, is currently in the process of reviewing the Audit for a final edit.

Dan Herz drew attention to an error on page 16 of the report concerning the line of credit, specifying a reference to December 2021 instead of 2022 prime rate. Andrew acknowledged this error and committed to making the necessary update. Additionally, Dan highlighted a numerical accuracy issue with the cents in number 5, pertaining to leasehold improvements, which requires correction. He queried if the names of the companies that contributed to the concentrations were listed, leaving the decision to HUF. Andrew responded affirmatively and mentioned that page 9 would be updated accordingly.



Governance Committee
Meeting Minutes
Friday, May 5, 2023 | 9:00 AM

Call to Order / Roll Call

Tony Abbate and Felina Furer

Began at 9am

Attending: Angie Stone, Tony Abbate, Christina Paradowski, Giselle Cushing, and Maritza Alvarez

Excused: Maria Barnard

Absent: Maria Elena Ferrer, Lucia Rodriguez and Melida Akiti

Approval of April 2023 Minutes

Tony Abbate

Giselle Cushing motioned to approve the consent agenda. A second was made by Angie Stone. Motion passed.

Recruitment, Development & Engagement

Tony Abbate

- a) Succession Planning:
 - Governance: Maria Barnard will assume the role as Chair of the committee in 2024. The committee agreed to start to get her input on agendas and have Maria run meetings starting in October or November. Tony mentioned he is Maria's mentor, and he will work with her on this task.
 - Marketing: Francisco Rivera will head up the committee in the second semester of 2023.
 - BOD Chair Elect: Tony will be Chair in 2024 & 2025. The committee needs to discuss and propose a Chair Elect for the Slate of Directors that will be presented to the BOD in November 2023.

Tony Abbate suggested having in-person meetings again thus committee members get to know each other better. Christina Paradowski mentioned that the May Board meeting is a hybrid meeting.

- b) Recruitment
 - Board and Committee Needs: HUF needs more names added to the pipeline. Felipe Pinzon shared that he has met with three individuals with a background in Marketing who are candidates for the marketing committee. He also stated that the organization and BOD need Board and/or committee members with

accounting/CPA background. Felipe also shared that Arnold Nazur is ready to leave the Finance committee.

- It was also discussed that the Board should recruit individuals with a Caribbean background and/or African American/Black.
- Giselle Cushing shared that she knows a consultant from El Dorado and that she will try to find someone to recruit. She also shared that there is a large Caribbean Beverage Canners company to explore.
- Tony also stated that he will reach out to Dr. Germaine Smith Baugh for recommendations.
- There is a concern about the board lacking in PR, Advocacy and Accounting backgrounds in the future. Hopefully each Board member can provide two recommendations over the next few months.
- Board recruitment guidelines (three C's) are in the portal, which Angie shared in the past helped HUF "find" these types of individuals.
- BoardLead: HUF will go to the next level and a new candidate will be referred to us in June. Then Governance will vet, and a decision needs to be made by October.
- Introductions: Felipe Pinzon mentioned that Francisco Rivera has made several introductions over the last two months.

c) Scorecard

- 2022 Overall BOD Performance: Felipe shared that HUF (staff) is tracking attendance for Board and all committees. He then presented the 2022 actuals.
- Google Form Tool: Angie stated that she has been tasked by Tony to create a user-friendly form using the board scorecard. She which she shared with the Governance committee. Angie suggested it should be on every board agenda. Bringing people together in person will help, Giselle said.

d) New Board Members Serving on Committees: Committee agreed this is a priority.

e) Mentorship Program Update

- The committee agreed that Tony will work with Maria Bernard. Lisette Rodriguez will mentor Christian Reyes. Ana Rodriguez should be linked with Carolina Cardozo due to her Advocacy interest.

f) Attendance: Information for Q1 in the packet.

Strategic Plan Update	Felipe Pinzon
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Tony suggested to get the update at the Board meeting due to lack of time.

Old/New Business

The committee agreed to make the following recommendation to the BOD on May 9, 2023, during the Board meeting.

Due to the extraordinary circumstance of the pandemic the term of each board member shall automatically be extended by 1 year. Individual board members may opt out of this term extension by communicating their preference to the chair, or the CEO, by May 31, 2023.

Christina Paradowski motioned to approve the proposed resolution. A second was made by Giselle Cushing. Motion passed.

Christina Paradowski shared with the committee that Ana Arguello resigned from the Board due to time constraints. The committee thanked her for all her contributions.

Adjourn

At 10:13am

Next Meeting: Friday, June 2, 2023 @9am

Hispanic Unity of Florida
Public Policy & Advocacy
Committee Meeting
MINUTES
Friday, May 12, 2023

Present: Carolina Cardozo, Dr. Jeff Nasse, Robby Holroyd, Christina Paradowski, Dr. Maria Bernal, Nic Hessing, Nazbi Chowdhury, Megan Turetsky, Dick Blattner, Kersti Myles, and Otto Valenzuela

Excused: Maggie Zalamea

Absent: Dan Schevis

Roll Call

Began at 9:00 AM

Approve April 2023 Minutes — Presented by Carolina Cardozo

Motion

Dr. Jeff Nasse moved to approve the April 2023 minutes. Robby Holroyd gave a second. Motion passed.

HUF's PP&A Activities Update & Appropriations Request Update — Presented by Otto Valenzuela

Otto shared sign-on letters HUF signed:

- National Association of Latino Elected and Appointed Officials (NALEO): comment letter to USCIS regarding the proposed revisions to Form I-942, Request for a reduced Fee for Form N-400, Application for Naturalization.
- National Immigration Law Center (NILC): Letter to the U.S. Senate opposing S.1473 - A bill to authorize the immediate expulsion of inadmissible aliens attempting to enter the United States by fraud or without a necessary entry document, and for other purposes.

The House companion to S.1473 that is addressing border security has a provision in it that refers to nonprofit organizations that receive federal funds to assist immigrants. HUF has been alerted that it could impact HUF's Citizenship grant from USCIS. We do not believe it will affect us as the language is aimed at organizations that assist immigrants at the border and the President has signaled he would veto if passed but we are keeping ourselves informed. There is a proposed rule change that would allow Dreamers to have access to ACA and Medicaid. Broward County School Board member Daniel Foganholi visited HUF in April and would like to partner around holding community townhalls, after graduation assistance, and other projects.

HUF's appropriation request for HEAL is back in the budget at \$500k after being cut down to \$250k which is now on the Governor's desk. The Governor does have line-item veto power and Robby Holroyd informed that it will be a tough year for projects in the budget and many cuts are expected but HUF should work with Ashley Boxer to see what can be done to shore up support for HUF's projects. The budget should be wrapped up by early June.

Ashley Boxer will continue under contract with HUF for the rest of 2023. For next year's legislative session, committee week in Tallahassee begins in September of 2023.

2023 Florida Legislative Session Wrap-Up: First Impressions

- a. **Expansion of Kid Care:** This is the first time the state has ever extended enrollment. The state funded \$20 million for the expansion and enrollment will begin January 1, 2024. Robby shared they did not get marketing and outreach dollars for the program; CSC will try to gain more dollars to advertise and will keep HUF informed. The Broward County School District will be promoting heavily as many more families will be eligible now.
- b. **Live Local Act (Affordable Housing):** Money goes mostly to developers versus general public. \$811 million is set aside for tax exemptions. New developments must have more than 70 affordable units. We do not know how much this will affect our clients.
- c. **HB 133; Fees in Lieu of Security Deposits:** This would assist renters to forgo security deposits and spread it over the entire rental contract so the initial cost of renting will be lower. There is concern because individuals would not be able to get back security deposit monies as it is now and they may be subject to additional fees for repairs. This is about being educated prior to renting and is something that HUF will inform our clients about for when they need to make this decision.

**Hispanic Unity of Florida
Public Policy & Advocacy
Committee Meeting
MINUTES
Friday, July 13, 2023**

Present: Carolina Cardozo, Dr. Jeff Nasse, Maggie Zalamea, Christina Paradowski, Nic Hessing, Nazbi Chowdhury, Dick Blattner, Kersti Myles, Christina Paradowski, Felipe Pinzon, Felina Furer, Shani Wilson, Otto Valenzuela

Absent: Dan Schevis, Megan Turetsky, Robby Holroyd, Maria Bernal

Roll Call: Began at 9:00 AM

Approve May 2023 Minutes — Presented by Carolina Cardozo

Motion

Dick Blatter moved to approve the May 2023 minutes. Kersti Myles gave a second. Motion passed.

HUF's PP&A Activities Update & Appropriations Request Update — Presented by Otto Valenzuela

- Otto shared that a proposed Public Charge rule in Congress has not moved forward; this is a positive development.
- Comment letter to Minority Leader in the U.S. House Hakeem Jeffries to oppose any effort to use the Congressional Review Act (CRA) to repeal the Biden Administration's public charge regulations.
- UnidosUS: U.S. Department of Health & Human Services: sign-on letter regarding proposed rulemaking around Health Coverage for DACA Recipients.
- National Association of Latino Asset Builders (NALCAB) Advocacy Day in Washington where we met with staff from Senator Rubio and Scott's office around the budget and federal aid programs.

2023 Florida Legislative Session Wrap- Up: Two Month Update

- a. **SB1718 Immigration Bill:** We have taken an educational approach of providing the facts to the clients and community. We do it under Children of Immigrant Families (CIFC) banner along with planning a future E-Verify workshop. The community is scared about their children and want to know if they can still attend school. Felipe shared he is working to get closer to partners and UnidosUS affiliates to share unified information and help community understand how this law effects community. There is so much misinformation from the first draft of the bill. Do we have a frequently asked questions sheet regarding this bill? Yes, Otto will share with committee and they can be found on CIFC website. Felipe offered to do a webinar for Broward College for Dr. Nasse's staff and or students.
- b. **Committee Member Updates:** Maggie Zalamea shared each municipality is going over affordable housing due to the new legislation passed. She is on the City of Plantation's advisory committee. She hardly see's any Hispanic representation at these meetings. Maggie will share meeting dates with us in the future. Dick Blattner shared City of Hollywood has millions to spend that is not being spent. It begins with creating supply.

HUF Strategic Planning

- **Process and Recommendations:** We are working on HUF's three year strategic plan. With an outside consulting group VeraCruz they interviewed internal and external stakeholders. Felipe shared the four goals under the PP&A umbrella. During this meeting we want to focus on number three, housing affordability. Our ideas need to align with the mission and the vision.
- **Policy and Advocacy Strategic Goal and Objectives:**
Please see additional document.

Adjourn
At 11AM

Next Meeting: TBD

PIF Sign On Letter for national, state and local organizations
Launched May 24, 2023

Dear Minority Leader Jeffries:

We are writing to urge you to oppose any effort to use the Congressional Review Act (CRA) to repeal the Biden Administration's public charge regulations. A repeal could reignite the dramatic chilling effects of the Trump public charge policy among millions of immigrant families, including their U.S. citizen household members, leading to a sicker, hungrier, and poorer nation.

Public charge is a policy that allows the government to deny entry, adjustment of status or visas to someone likely to become primarily dependent on the government for subsistence. For most of its existence, it has been interpreted consistently. The Trump policy upended decades of public charge precedent to instead create a wealth test for immigrants. The subsequent fear drove families and children away from their doctors right before an unprecedented global health pandemic, and widened racial disparities in health, hunger, and [poverty](#). By the parameters established by the Trump public charge regulation, *about half of all U.S.-born citizens* would likely be deemed a public charge were the test applied to them.

In September of 2022, the Biden Administration finalized a rule which helped to clarify the longstanding public charge policy interpretation. The current policy bars the U.S. Department of Homeland Security (DHS) from considering the use of health care, nutrition, or housing programs by people applying for green cards. The Biden public charge rule also provided important clarifications which assist service providers and help to build trust among immigrant families.

The CRA resolution to rescind the Biden public charge rule would erode that trust and create a more confusing policy environment, keeping immigrants and their families from seeking the benefits to which they are entitled. While passage of this resolution would not bring back the Trump public charge rule, the use of a CRA puts the future of moderate public charge regulations at risk. Last April, Members of the Congressional Tri-Caucus and House Judiciary Committee [filed a comment in support of the Biden public charge rule](#). Today, we urge you to oppose efforts to repeal it.

We believe in a country where everyone is respected and has access to the health care and support they need, without fear and regardless of where they were born. Thank you in advance for continuing your commitment to immigrant families, and opposing this move.

Sincerely,



July 28, 2023

Submitted via Federal eRulemaking Portal

Jerry L. Rigdon
Acting Branch Chief
Regulatory Coordination Division
Office of Policy and Strategy
U.S. Citizenship and Immigration Services
Department of Homeland Security

**RE: DHS Docket No. USCIS-2018-00020; OMB Control Number 1615-0133;
Agency Information Collection Activities; Revision of a Currently Approved
Collection: Request for Reduced Fee**

Dear Acting Branch Chief Rigdon:

On behalf of the Naturalization Working Group, the National Association of Latino Elected and Appointed Officials (NALEO) Educational Fund submits the following comment in response to U.S. Citizenship and Immigration Services' ("USCIS" or "the Agency") proposed revision of a currently approved collection of information, Form I-942, Request for a Reduced Fee.¹

The NWG is coordinated by the NALEO Educational Fund and is made up of national, state, and local organizations and individuals committed to helping lawful permanent residents (LPRs) become U.S. citizens. The NWG strives to improve federal policies and practices related to naturalization and to educate legislators and other policymakers about the need to eliminate barriers to naturalization. Our coalition's expertise derives from its multiple member organizations that have significant experience in promoting naturalization and in assisting newcomers with the U.S. citizenship process, including immigrants who are serving in our military. The NWG is the policy complement to the New Americans Campaign (NAC), a diverse nonpartisan national network of respected immigrant-serving organizations, legal services providers, faith-based organizations, immigrant rights groups, foundations, and community leaders. The Campaign transforms the way aspiring citizens navigate the path to becoming new Americans. Through our extensive networks with service providers, immigration practitioners, and naturalization applicants, we have developed a profound understanding of the barriers faced by low-income individuals seeking to obtain naturalization.

¹ 88 Fed. Reg. 14,630 (Mar. 9, 2023) [hereinafter Proposed Revision], <https://www.federalregister.gov/d/2023-04791>, and 88 Fed. Reg. 41,979, <https://www.govinfo.gov/content/pkg/FR-2023-06-28/pdf/2023-13720.pdf>.

After its March Federal Register Notice, in late June 2023, USCIS re-opened the form up for another 30-day period. This comment refers to the current instructions for Form I-942, [Instructions for Request for Reduced Fee](#) and the [Table of Changes](#) as "Instructions" and "proposed instructions," respectively.

I. Introduction

The NWG believes that USCIS must ensure that naturalization is affordable and accessible for the more than 9 million LPRs who are eligible for U.S. citizenship. For these eligible LPRs, naturalization marks an important step towards full participation in the civic life of their new home. U.S. citizenship provides many opportunities, such as the ability to vote, the enhanced ability to reunite families, eligibility for federal jobs, and increased financial security. Several studies show that naturalization confers economic benefits on new U.S. citizens, their families, their communities, and the nation as a whole.²

However, the high cost of naturalization remains a barrier for many eligible LPRs. For example, an analysis from the Center for Migration Studies of New York (CMS) found that 39 percent of those eligible for naturalization live in households with incomes below 150 percent of the Federal Poverty Guidelines.³ In addition to naturalization fees, many LPRs also face costs such as English language and civics classes, legal fees, and other expenses that may arise during the naturalization process.⁴

While a full waiver from naturalization fees has existed for many decades, in late 2016, USCIS recognized that there were some applicants who could not qualify for the full waiver, but could pay part of the fee, and established a process for applicants to request a reduced fee, using the Form I-942. The undersigned organizations have found that the reduced fee has made naturalization accessible to lower- and moderate-income LPR families who do not qualify under the more stringent requirements for the full waiver. This has helped ensure that more eligible LPRs and our country can realize the benefits conferred by naturalization.

Our comments on the Proposed Revision first focus on the need for further revisions to the current instructions for Form I-942. We also use this opportunity to urge USCIS to implement online filing for the Form, and to change the income threshold to qualify for the reduced fee.

II. Comment

A. Clarifying the Instructions for Part 2, Item 1, *Information About Family Members Filing This Request With You* and Part 3, Item 3, *Your Household Size*

NWG Members report applicants having difficulty understanding which family members need to be included in the tables in Part 2, Item 1 and Part 3, Item 3. USCIS proposes no revisions to the Instructions and the Form for either of these items. NWG recommends USCIS clarify the

² Economic Impact of Naturalization, New Americans Campaign (last visited Mar. 13, 2023), <https://www.newamericascampaign.org/policy-makers/research/#economic-impact-of-naturalization/>.

³ Donald Kerwin and Robert Warren, *Putting Americans First: A Statistical Case for Encouraging Rather than Impeding and Devaluing US Citizenship*, 7 J. on Migration and Human Sec. 108, 115 (Dec. 11, 2019), <https://journals.sagepub.com/doi/10.1177/2331502419894286>.

⁴ E.g., "The Cost of Immigrating to United States," *The Economic Times*, May 28, 2021, <https://economictimes.indiatimes.com/nri/migrate/the-costs-of-immigrating-to-the-unitedstates/articleshow/82966455.cms?from=mdr>.

Instructions and accompanying text on the Form for both of these items, because they could confuse and possibly mislead applicants.

USCIS should change the language in the Instructions and on the Form for Part 2, Item 1 to make it clear that it is requesting the names of all other family members who are both filing Form N-400 and requesting the reduced fee.

For Part 3, Item 3, USCIS seeks to elicit from the applicant: 1) whether the applicant provides primary financial support for the household as the head of the household, 2) if not the applicant, who the head of household is, and 3) who the other members of the household are. If the applicant is not the head of the household, to collect the name of the family member who is, USCIS must rely on the applicant selecting “no” in response to Part 3, Item 3 and then listing the name of the head of the household on the second line of the accompanying table. As for the other members of the household, Part 3, Item 3 of the Form only mentions listing the applicant’s name or the applicant’s name and the head of household’s name—making no mention of other members of the household. The Form language should be changed, along with conforming changes to the Instructions, to ensure the three categories of information USCIS wishes to collect are clearer to applicants.

B. Need for Online Filing of Form I-942

Providing an online filing option for Form I-942 would minimize the burden of the collection of information. Currently, applicants can file Form N-400 online or on paper, but can only file an accompanying Form I-942 on paper. Because an applicant can only file Form I-942 on paper, they must also file Form N-400 on paper.⁵

While many low-income applicants may not have access to the computer technology or broadband internet access needed to file Form I-942 online, where that access exists, low-income applicants should have the same opportunity to file their Form N-400 online as higher-income applicants do. We note that filing the Form N-400 online leads to greater efficiency in adjudication for both applicants and USCIS. Efficiency measures should not be reserved for those of higher financial means. We urge USCIS to move forward with providing online filing for Form I-942 as swiftly as possible.

C. Increase Threshold for Eligibility for Reduced Fee

When USCIS solicited comments on changes to its fee schedule in January 2023, it asked for comments on the appropriate level of income that USCIS should use to determine eligibility for the reduced fee. We would like to reiterate comments made at that time that the requirement that household income be less than 200 percent of the federal poverty guidelines still prevents a significant number of lower- and moderate-income LPRs from qualifying for the reduced cost,

⁵ Special Instructions, I-942, Request for Reduced Fee, USCIS (last visited May 8, 2023) (“You cannot file online if you are requesting a reduced fee; you must file a paper Form N-400.”), <https://www.uscis.gov/i-942>; Where to File, I-912, Request for Fee Waiver, USCIS (last visited May 8, 2023) (“You cannot file online if you are requesting a fee waiver. You must file paper versions of Form I-912 and the form for which you are requesting a fee waiver.”), <https://www.uscis.gov/i-912>.

making naturalization unaffordable. Thus, we recommend that the agency adopt an income threshold of 250% or less for applicants to qualify for the reduced fee.⁶

III. Conclusion

When the current Administration issued its February 2021 Executive Order on Restoring Faith in Our Legal Immigration Systems and Strengthening Integration and Inclusion Efforts for New Americans, NALEO Educational Fund commended the commitment set forth in that order to eliminate barriers to naturalization. We have also welcomed the many steps taken by USCIS to carry out the provisions of that order, and the agency's responsiveness to engagement with and feedback from stakeholders throughout the process. If you require further information about these comments, please do not hesitate to contact Rosalind Gold, Chief Public Policy Officer at rgold@naleo.org. Thank you for the opportunity to submit comments on these proposed revisions.

Sincerely,

National
NALEO Educational Fund

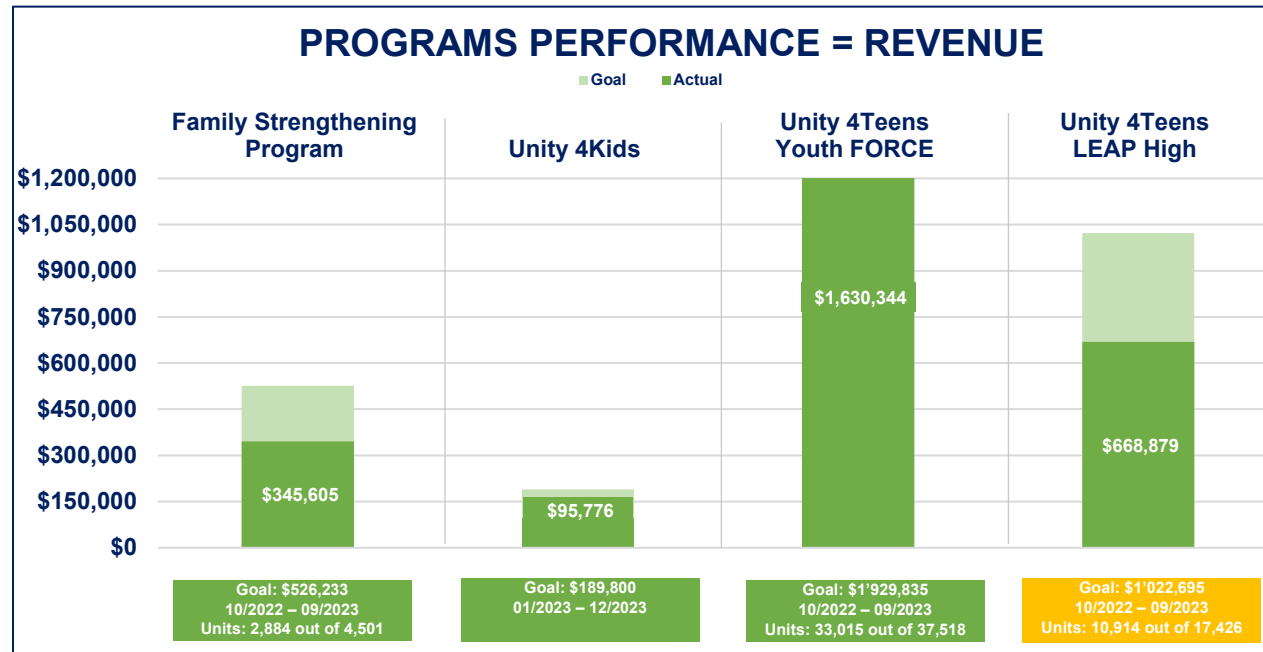
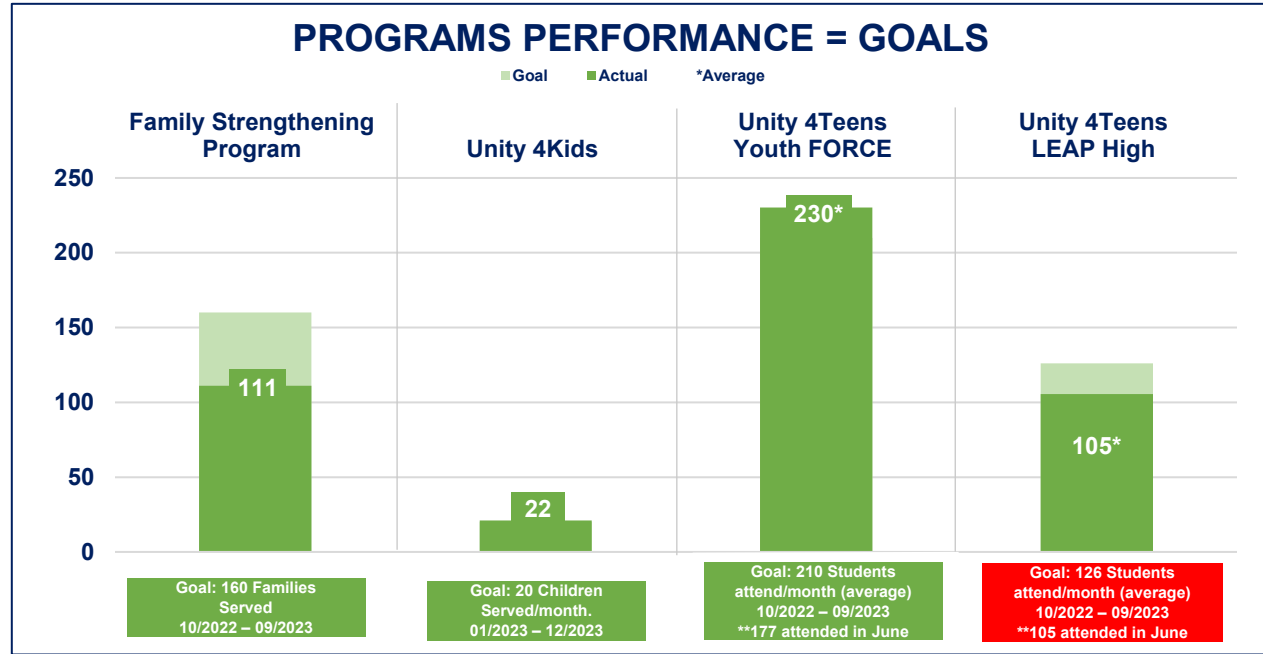
⁶ See, e.g., Reduce Financial Barriers to Immigration and Citizenship Act of 2021, H.R. 5319, 117th Cong. § 3 (2021).



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EDUCATION

JUNE 2023



Based on current results and if future projections are met:

On track to meet goals/projections > 95% of the goal

Close to being on track to meet goals/projections 85% > 94% of the goal

Not on track to meet goals/projections <85% of the goal

*Unity 4Teens Program Performance Goals are based on the average students that attend daily.



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ECONOMIC DEVELOPMENT JUNE 2023

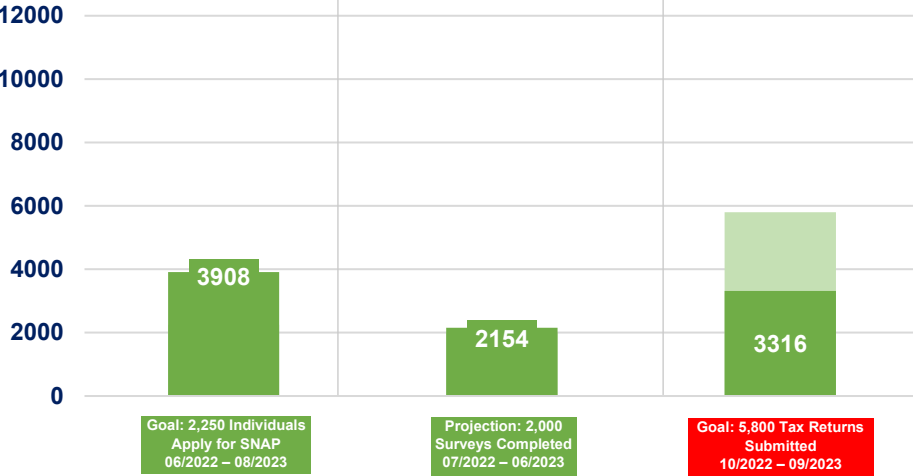
PROGRAMS PERFORMANCE = GOALS

■ Goal ■ Actual

Comprando Rico y Sano

Health Literacy

VITA



PROGRAMS PERFORMANCE = GOALS

■ Goal ■ Actual

Te Ayudo

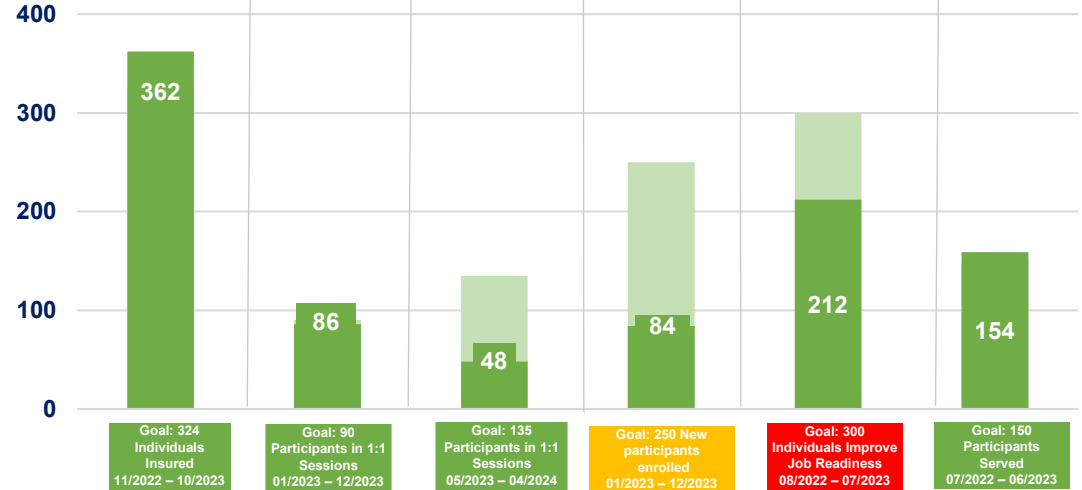
Housing

Financial Capabilities

CWF

AmeriCorps

HEAL

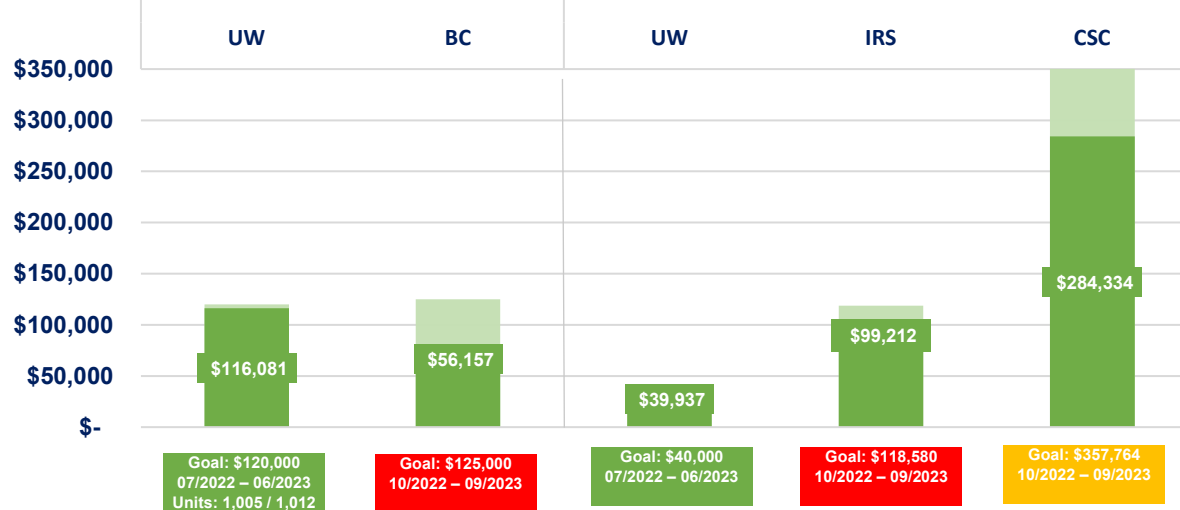


PROGRAMS PERFORMANCE = REVENUE

■ Goal ■ Actual

CWF

VITA



Based on current results and if future projections are met:

On track to meet goals/projections > 95% of the goal

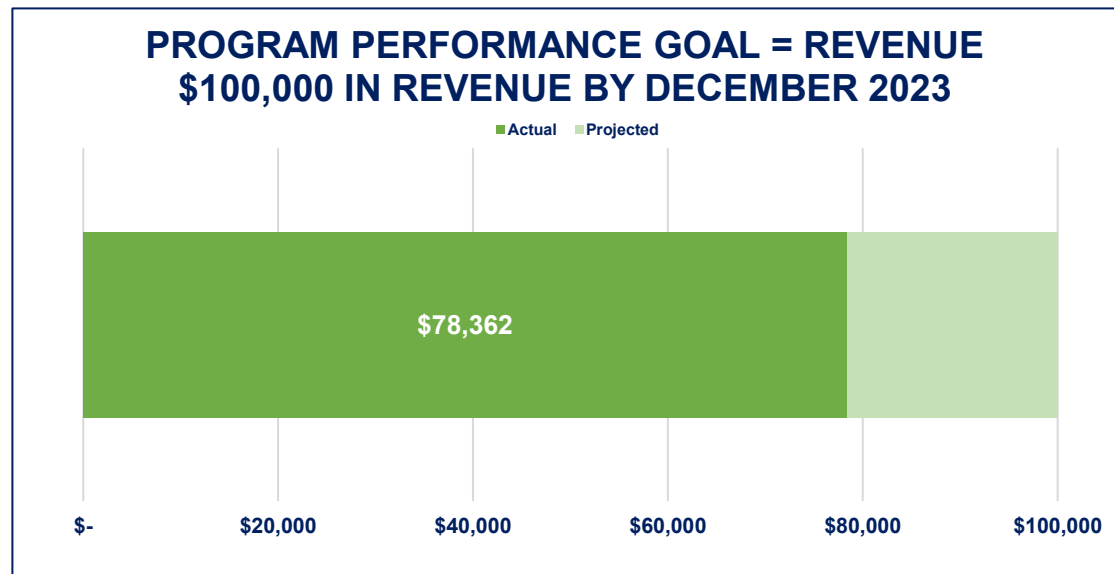
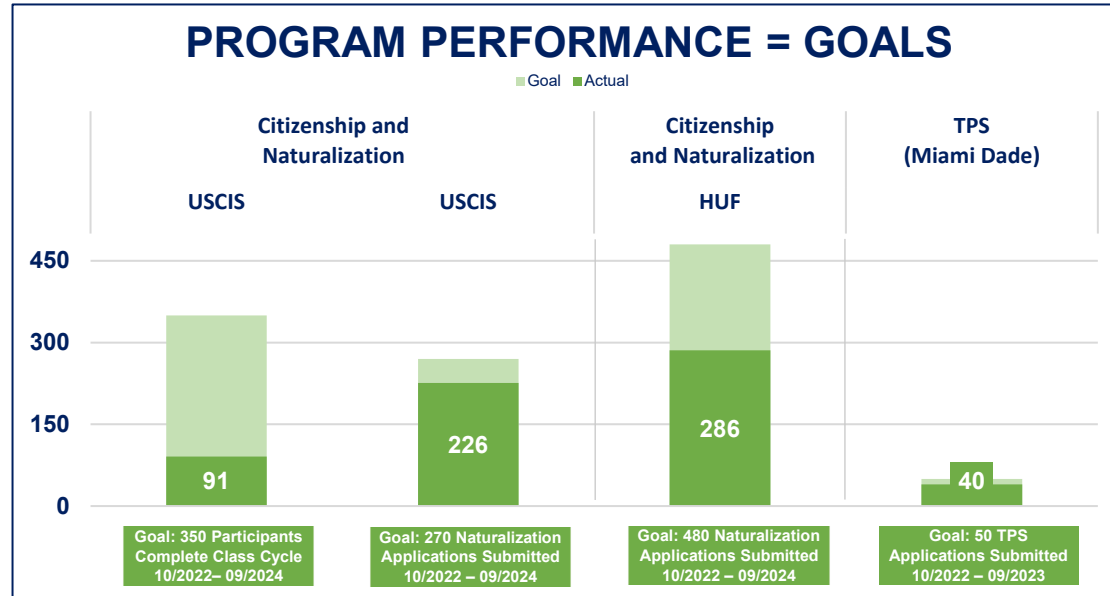
Close to being on track to meet goals/projections 85% > 94% of the goal

Not on track to meet goals/projections <85% of the goal



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CIVIC ENGAGEMENT JUNE 2023

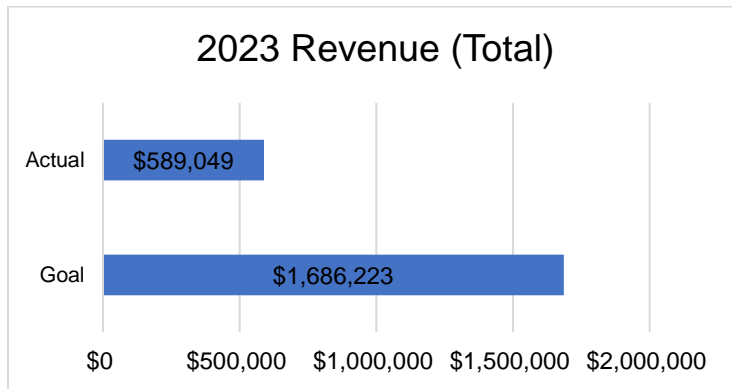


Based on current results and if future projections are met:

On track to meet goals/projections > 95% of the goal

Close to being on track to meet goals/projections 85% > 94% of the goal

Not on track to meet goals/projections <85% of the goal



Breakdown of Revenue

Unrestricted	Goal	Actual	Variance
Annual Campaign	\$14,000	\$3,861	(\$10,139)
Circle of Friends	\$50,000	\$25,198	(\$24,802)
Corporate	\$310,000	\$60,666	(\$249,334)
Events	\$80,000	\$0	(\$80,000)
Major Gifts	\$70,000	\$12,000	(\$58,000)
Major Gifts (MY)	\$35,000	\$0	(\$35,000)
Miscellaneous	\$1,000	\$1,074	\$74
UNR Total	\$560,000	\$102,799	(\$457,201)
Temporarily Restricted	\$1,126,223	\$486,250	(\$639,973)
TR Total	\$1,126,223	\$486,250	(\$639,973)
GRAND TOTAL	\$1,686,223	\$589,049	(\$1,097,174)

Other Revenue

Secured for Other FY	2024	2025	2026
Total	\$850,423 ¹	\$100,000 ²	\$33,333 ³

Miniaci Match	Goal	Actual	Variance
Total	\$50,000	\$5,500	\$(44,500.00)

Rose Miniaci Family Fund – Match Grant Challenge (Year 1 = July 1, 2023 – June 30, 2024, Goal = \$50,000)

Emergency Assistance	Actual
Total	\$50,000

Financial assistance for clients and staff impacted by April 2023 rainfall & flood.

¹ Children’s Services Council of Broward (FSP), Community Foundation of Broward (CWF), and Urban Institute (AHL)

² Community Foundation of Broward (CWF)

³ Community Foundation of Broward (CWF)

<u>Grant Pipeline (Conservative)</u>			<u>Grant Pipeline (Aggressive)</u>		
Month/Year	# of Requests	Value of Requests	Month/Year	# of Requests	Value of Requests
6/2023	6	\$ 113,438	6/2023	1	\$ 10,000
9/2023	6	\$ 101,475	Grand Total	1	\$ 10,000
12/2023	4	\$ 95,000			
Grand Total	16	\$ 309,913			

<u>Grants Submitted</u>			<u>Grants Awarded</u>		
Month/Year	# of Requests	Value of Requests	Month/Year	# of Awards	Value of Awards
12/2022	2	\$ 50,000	12/2022	2	\$17,500
1/2023	2	\$ 65,000	1/2023	3	\$83,167
2/2023	6	\$ 799,878	2/2023	3	\$87,387
3/2023	1	\$ 70,000	3/2023	2	\$240,030
4/2023	5	\$ 659,000	4/2023	2	\$86,667
5/2023	12	\$ 1,077,272	Grand Total	12	\$514,750
6/2023	2	\$ 220,000			
Grand Total	30	\$ 2,941,150			

<u>Pitch Pipeline</u>			<u>Pitches Awarded</u>		
Month/Year	# of Requests	Value of Requests	Month/Year	# of Awards	Value of Awards
6/2023	3	\$ 30,000	1/2023	1	\$ 10,000
Grand Total	3	\$ 30,000	3/2023	11	\$ 7,520
			4/2023	1	\$ 24,000
			12/2023	1	\$ 9,800
			Grand Total	14	\$ 51,320

<u>Pitches Submitted</u>		
Month/Year	# of Requests	Value of Requests
3/2023	8	\$ 8,000
5/2023	1	\$ 200,000
Grand Total	9	\$ 208,000

NOTE

- Walmart Note - \$125K UNR pitched in March; \$500 awarded to date. Submitted amount does not appear in pipeline since partially awarded.



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Helping Not-For-Profits Fulfill Their Mission

STRATEGIC PLANNING

Board of Directors Retreat

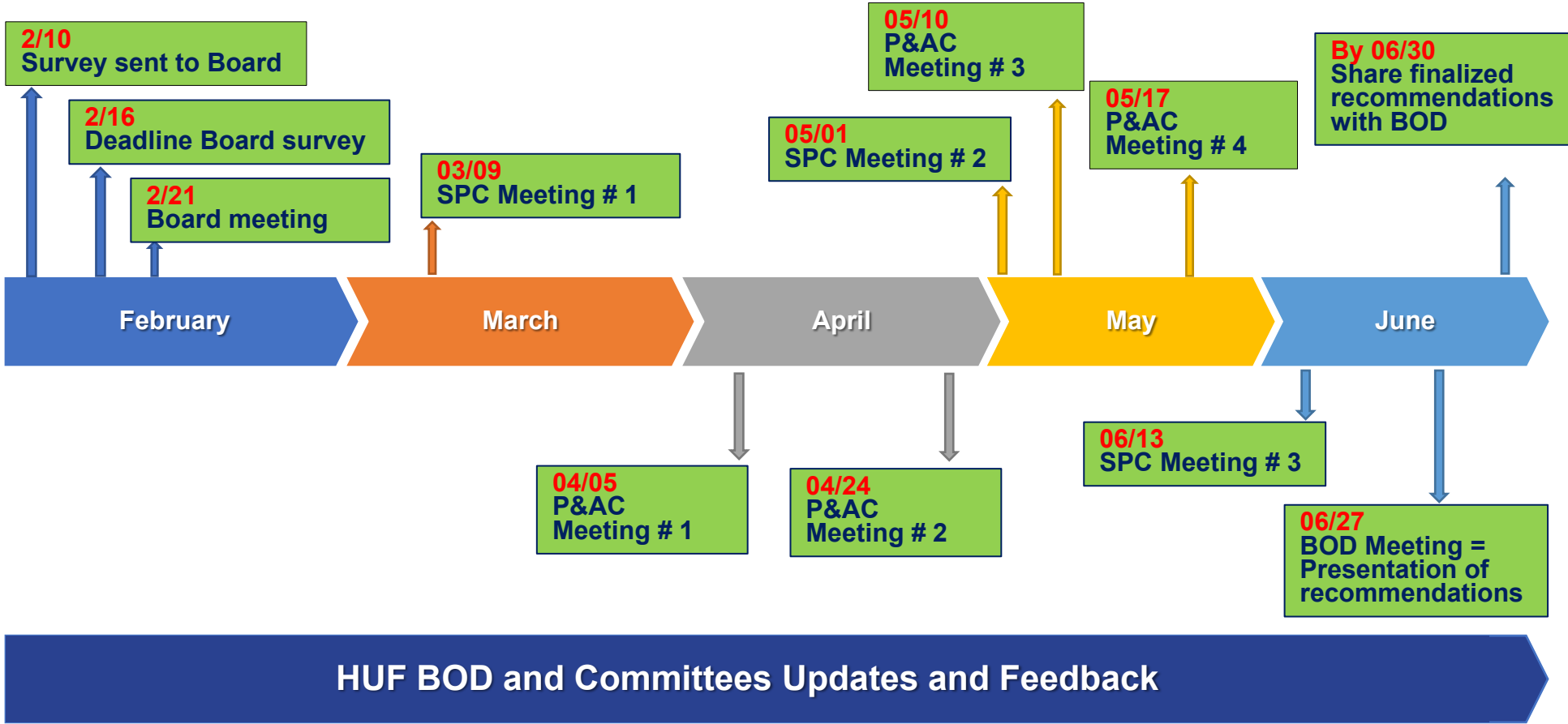
September 23, 2023



Empowering a New Generation of Americans



Helping Not-For-Profits Fulfill Their Mission

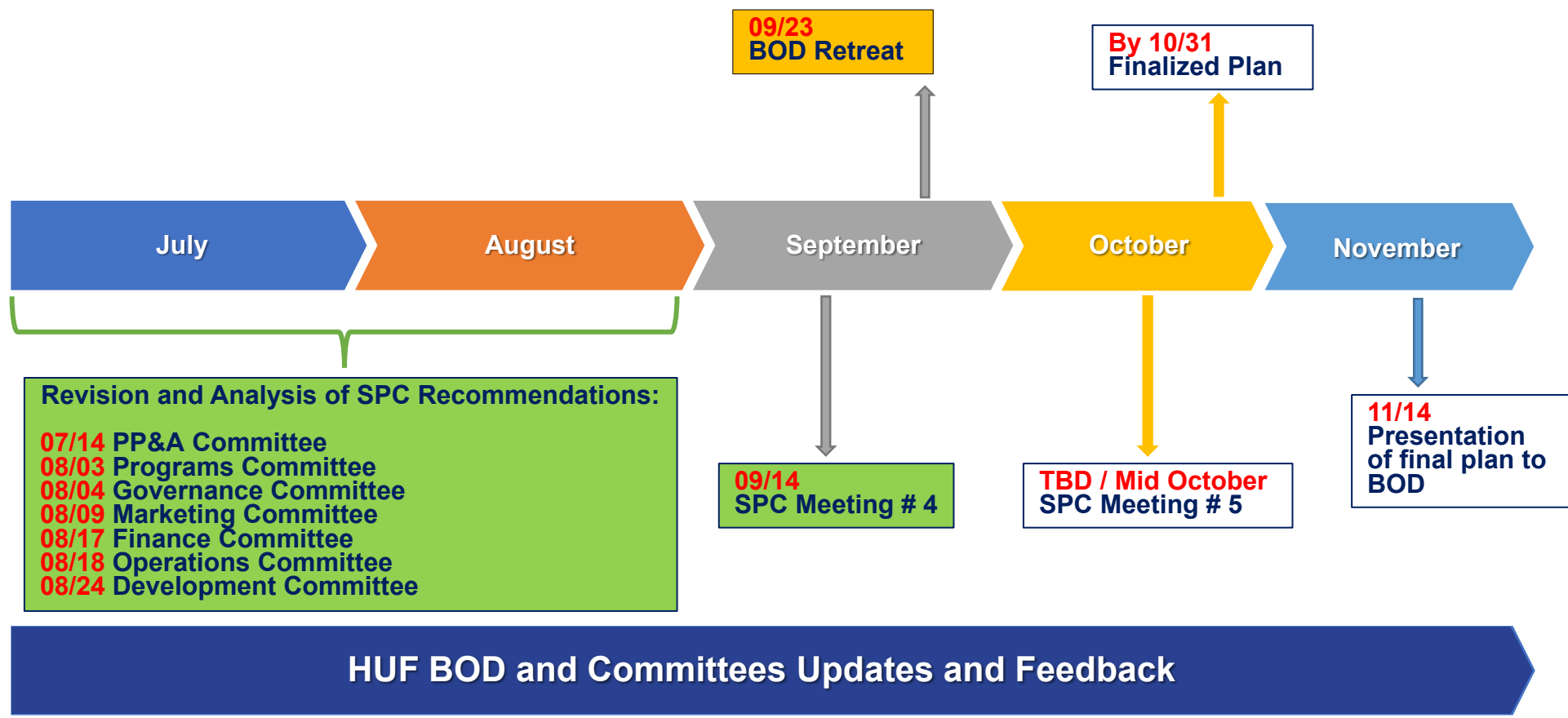




Empowering a New Generation of Americans



Helping Not-For-Profits Fulfill Their Mission





STRATEGIC VISION AND PLAN

Goals, Objectives, and Next Steps

Strategic Goal # 1: Respond to current and emerging community needs by increasing access to HUF's programs and services.

Objectives	Next Step	Committee
1.1 Ensure HUF's programs and services effectively respond to the evolving needs of the community.	1.1.1 Conduct continuous comprehensive community needs assessments to identify current and emerging needs.	HUF
	1.1.2 Streamline the evaluation of the effectiveness of programs and services.	HUF
	1.1.3 Identify opportunities to enhance and/or expand programs and services and explore innovative approaches to address emerging community needs.	HUF
	1.1.4 Assess the representation of the community within HUF's Board of Directors and staff. (i.e. Bi-Annual/Annual review of data by the Board to better advise the Agency).	Governance
	1.1.5 Periodically assess programs and services to evaluate if current strategies are effectively addressing community needs. (i.e. HUF's Board of Directors to analyze realignment of strategies).	Governance
1.2 Increase community access to Programs and Services. <i>(this can be done through external collaborative relationships or by providing internal programs and services or both)</i>	1.2.1 Fine-tune HUF's Community needs assessments, research efforts, and data analysis to better target the Agency's service delivery strategies.	Programs
	1.2.2 Create a detailed strategy for geographic expansion, strengthening partnerships to attain it.	Programs
	1.2.3 Expand and strengthen HUF's outreach and marketing efforts.	Programs

Strategic Goal # 2: Expand Income and wealth-building opportunities for working families*.

(* These strategic Goal and Objectives will also include fostering individual financial and credit literacy - whether through internal channels or in collaboration with external parties.)

Objectives	Next Step	Committee
	First step for all: Assess partnership opportunities and research the market to design strategies	
2.1 Strengthen workforce education by providing opportunities for professional growth that allow to adapt to the South Florida labor market.	2.1.1 Design workforce education pathways with a two-generation approach that include an education and training component for parents, and a career readiness and practical skills training component for the youth (partner with local businesses and education institutions to provide hands-on training and learning experiences).	Programs
	2.1.2 Periodically identify opportunities in the labor market for in-demand jobs (limit focus) and design a partnership strategy to attain this.	Programs
2.2 Provide comprehensive support and resources to aspiring homeowners, empowering them to buy and preserve their assets.	2.2.1 Assess market changes and educate families in homeownership opportunities in different geographical areas	Programs
	2.2.2. Protect vulnerable families from predatory market activity and prevent involuntary displacement by providing education and resources on these topics. (i.e.: creation of wills, taxes, homestead exemption, etc.)	Programs
	2.2.3 Share community needs assessment results with different stakeholders to advocate for clients that have challenges in becoming homeowners. (i.e. financial institutions)	Programs
2.3 Provide comprehensive support and resources to aspiring and existing business owners, empowering them to establish, grow, and sustain successful businesses.	2.3.1 Design a culturally relevant curriculum, based on the specific needs of the community. (i.e. define what to do internally or when to engage partners effectively; provide different tools, resources, and opportunities to aspiring and existing business owners; include workshops component, coaching sessions component, mentorship component, etc.)	Programs
	2.3.2 Explore and evaluate different opportunities to provide aspiring or existing business owners with economic resources to create or sustain their businesses. (i.e. CDFI opportunity, partnerships with other organizations, exploration of grants, loans, investor connections, etc.)	Programs

Strategic Goal # 3: Define and strengthen HUF's role in Policy and Advocacy.

Objectives	Next Step	Committee
3.1 Engage stakeholders in conversations around systemic issues that impact South Florida working families.	3.1.1 Meet with working families to get their input and feedback on community needs (e.g.: Organize a townhall meeting with colleges/universities and municipalities; partner with other organizations: ULBC, UWBC, CSC; invite media partners).	PP&A
	3.1.2 Seize opportunities to meet with elected officials (commissioners/mayors)	PP&A
	3.1.3 Convene corporate, public, and private stakeholders to discuss Policy and Advocacy matters (e.g.: Broward College's Village Square)	PP&A
3.2 Assess and determine HUF's role in addressing the Hispanic gap in Leadership positions.	3.2.1 Partner with National organizations that are focused on leadership development (e.g.: Hispanic Leadership Institute - access their trainings, resources, scholarships, etc.)	PP&A
	3.2.2. Create HUF's leadership development program (including a mentorship program).	PP&A
	3.2.3 Support the creation of a Hispanic/Immigrant leaders coalition (potential first step: identify existing local elected officials who have immigrant backgrounds; Broward County may be the convener).	PP&A
3.3 Encourage and empower clients to be civically engaged at the local level.	3.3.1 Develop an intentional strategy on voter registration and engagement.	PP&A
	3.3.2 Advocate for the creation of a non-partisan political candidate information guide in Spanish/Haitian-Creole/Portuguese/etc.	PP&A
	3.3.3 Promote and/or facilitate the participation of the Spanish-speaking/immigrant community in election debates/townhalls/panels.	PP&A
3.4 Empower the staff, volunteers, Board of Directors to become advocates for HUF's clients.	3.4.1 Ask HUF staff, volunteers, and Board of Directors to participate in local activities in their respective fields and represent HUF (ex. Elected official's townhalls).	PP&A
	3.4.2 Create an engagement plan for HUF staff and volunteers (e.g. BOD and HUF committee members) that includes call-to-actions.	PP&A
	3.4.3 Create an ULBC & HUF "Day at the Capitol", "Day at City Hall", "Day at County Commission".	PP&A
	3.4.4 Review and update the Agency's bylaws to include an advocacy component in the Board of Directors' job description.	Governance
	3.4.5 Create an ongoing training plan on advocacy for the Board of Directors.	Governance
3.5 Develop a comprehensive policy agenda that outlines HUF's desired impact and the areas of policy and advocacy where the agency should work.	3.5.1 Explore opportunities for partnerships with local municipalities to advance HUF's work, both programmatic and around PP&A.	PP&A
	3.5.2 Ensure agenda is informed by various stakeholders, including clients and staff.	PP&A
	3.5.3 Make childcare and early childhood education a priority (connected to workforce and economic stability/self-sufficiency); related agenda items – early literacy, school readiness (kindergarten)).	PP&A

Strategic Goal # 4: Position HUF for growth while achieving operational excellence.

Objectives	Next Step	Committee
4.1 Establish strategic partnerships or collaborative arrangements with external parties that advance HUF's mission and fit the organization's 2024-2026 strategic plan goals.	See next steps 1.2.2 - 2.1.1 - 2.1.2 - 2.3.1 - 2.3.2	Programs
	See next steps 3.1.1 - 3.1.3 - 3.2.1 - 3.2.3 - 3.4.3 - 3.5.1	PP&A
4.2 Increase HUF's visibility by strengthening outreach and communication.	4.2.1 Create a versatile marketing and communications framework designed to establish objectives, facilitate cross-committee collaboration, define audience segments, and ensure continuous feedback, all while enabling precise outreach strategies tailored to diverse audiences through personalized messaging.	Marketing
4.3 Ensure financial sustainability by diversifying sources of revenue and expanding multi-year and unrestricted funding.	4.3.1 Increase HUF's development capacity by investing in human capital (staff and/or consultants).	Development
	4.3.2 Revisit and revive efforts focused on individual donors (Circle of Friends - Benefits, Engagement, Promotion; Existing Stewardship Activities; Planned Giving)	Development
	4.3.3 Target family foundations	Development
	4.3.4 Evaluate the Agency's revenue mix by comparing it with similar best-in-class organizations (CBOs) and according to strategic plan Board approved benchmarks, that align with HUF's financial goals and not deviating from the ideal distribution (this will allow to prioritize and identify categories for improvement, define milestones, and adjust the strategy periodically based on progress and industry trends).	Finance
	4.3.5 Based on Fund Development's findings and defined next steps to attain diversification of funding, oversee the accomplishment of the agreed revenue mix and advise on adjustment of strategies.	Finance
	4.3.6 Identify and assess innovative ideas to grow unrestricted funding (i.e. charging fees for specific programs, creating an investment policy, creating a Board designated endowment, shifting to a social enterprise model by becoming a technical assistance provider).	Finance

4.4 Increasing the Board of Directors' capacity to engage in order to effectively and strategically execute their duties and functions	4.4.1 Review and update the Agency's bylaws to strategically guarantee the continuous engagement of the members of the Board of Directors. (i.e. encourage and promote engagement, attendance to in-person meetings, visiting the Agency, attending events, etc.)	Governance
	4.4.2 Strategically ensure leadership diversity in HUF's Board of Directors (bench strength).	Governance
	4.4.3 Create a Board of Directors formal succession plan to guarantee its sustainability.	Governance
	4.4.4 Diversify board composition and Board development goals to engage individuals with experience and insight different than what we've traditionally had (i.e., business owners, employers with a stake in an immigrant workforce, individuals with investment expertise, competitive fundraisers/friend raisers)	Development
	4.4.5 Assess current BOD members' perspectives, interests, and obstacles on Fund Development and provide appropriate resources/training in response.	Development
4.5 Create a dedicated Human Resources Department and hire an HR Manager - Special focus on recruitment, retention, compliance, and staff professional training and development.	4.5.1 Assess HUF's current HR structure to identify strengths, gaps, and opportunities for improvement.	Operations
	4.5.2 Expand the current plan to address HR gaps and future growth. (i.e. creating an HR Committee to oversee design and monitor goals as needed, evaluate HR software, standardize processes and procedures, address internal capacity, etc. Attach current HR buildout timeline)	Operations
	4.5.3 Design and implement HUF's employee lifecycle. (i.e. recruitment, onboarding, professional development, training, career pathways, etc.)	Operations
4.6 Enhance organizational infrastructure to improve overall efficiency and effectiveness.	4.6.1 Assess HUF's current operations infrastructure (facilities, systems, and structures) to identify strengths, gaps, and opportunities for improvement. (i.e. Prioritize securing a sustainable financial software system to sustain growth and that adheres to required compliance mandates and reporting).	Operations
	4.6.2 Develop and implement an action plan to automate infrastructure processes and systems in order to be able to improve efficiency and effectiveness.	Operations
	4.6.3 Prioritize and optimize existing facilities (physical and virtual) to increase the footprint needed for growth and ensure efficiency.	Operations