

The background is a vibrant, abstract composition. It features several concentric, semi-circular arcs in shades of blue, green, and yellow, resembling a rainbow. In the center, there is a stylized figure with arms raised, composed of a green circle for the head and two green rectangular shapes for the arms. The entire scene is set against a backdrop of colorful, textured brushstrokes in various hues. In the bottom left corner, there are large, overlapping geometric shapes in orange, yellow, and green.

Transforming LIVES

United Way  of the Mid-South

ANNUAL REPORT

July 1, 2021 — June 30, 2022

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JEAN M. MORTON

*Truist Bank
Immediate Past Board Chair,
United Way of the Mid-South*

GREETINGS FROM OUR IMMEDIATE PAST BOARD CHAIR

United Way of the Mid-South continues to meet the challenges and needs of our community. The 2021-22 fiscal year was defined by our ability to deliver on our mission with *innovation*; to address a new way of working and engaging with our communities, partners, clients, stakeholders, and staff.

Innovation expanded our mission; as the Board launched the Equity Fund that integrates an equity lens into our grantmaking. Eight grassroots community organizations received inaugural funding to address racial inequity at the neighborhood level. Likewise, the United Way staff instituted new organization-wide DEI practices to ensure equity in our internal operations.

The Board and I are also proud to note that following our United Way's innovative role as administrator for \$26 million of CARES Act funding, we maintained a clean opinion on our audited financial statements.

Finally, we have clearly established ourselves as the leader in innovation, as ***Driving The Dream™*** has become a national model for human services systems of care. Thousands of individuals across the Mid-South are realizing their dreams of socioeconomic mobility because of the *innovative* network of multi-domain community-based supports that ***Driving The Dream™*** delivers!

Sincerely,

BOARD OF DIRECTORS

ERIC BROWN, Valero Energy Corporation

SHANNON A. BROWN, FedEx Express

JOHNEKIA "NEKI" CATRON, Southland Gaming

DARRELL COBBINS, Universal Commercial LLC

UWMS Community Impact Chair

REBECCA CULLISON, Methodist Le Bonheur
Germantown Hospital

JEFFERY GREER, FedEx Freight
UWMS Human Relations Chair

SCOTTY HENDRICKS, New York Life Insurance, W. TN

MARY ANN JACKSON, Baker, Donelson, Bearman,
Caldwell & Berkowitz *UWMS Secretary/Counsel*

JAMES JONES, Teamsters Local representing UPS

MELANIE A. KELLER, Meritan, Apelah & Generations, Inc.

ROBERT C. KLESGES, PH.D., University of Virginia
Medical School

TODD LOCHNER, Principle Toyota in Memphis

URSULA MADDEN, City of Memphis

DAVID MAY, Regions Bank
UWMS Investment Committee Chair

JEAN M. MORTON, Truist Bank
*UWMS Immediate Past Chair & Nominating
Committee Chair*

JOHN PETTEY III, Raymond James
UWMS Tocqueville Society Chair

JOSH POAG, Poag Shopping Centers

AYOKA POND, Baptist Memorial Health Care Corporation

NATALINE PURDY, Community Representative

REV. KENNETH S. ROBINSON, M.D.,
United Way of the Mid-South

RANDY STOKX, Deloitte Services LP

LETICIA "TISH" TOWNS, Regional One Health
UWMS Marketing & Communications Chair

KEITH TOWNSEND, International Paper
UWMS Corporate Engagement Chair

CHRIS VANSTEENBERG, First Horizon

CRAIG L. WEISS, Tower Ventures
UWMS Chair-Elect and Investment Committee Chair

KEVIN WOODS, BlueCross BlueShield of Tennessee
UWMS Public Policy Chair

RICHARD WRIGHT, Ernst & Young, LLP
UWMS Treasurer and Finance Chair

J.T. YOUNG, MLGW *UWMS Board Chair*

LETTER FROM THE PRESIDENT & CEO



REV. KENNETH S. ROBINSON, M.D.

President and CEO, United Way of the Mid-South

We've all heard... "*That was the year that was!*" However, as we approach the end of 2022, this past quasi-post-pandemic year is still... "*the year that is.*" We all wished to have turned the page on COVID-19, but the persistent and possibly permanent ramifications of the pandemic have not *quite* turned the page on us! At United Way of the Mid-South - with your support, the leadership of our board, guidance from public health authorities, recommendations from the business community, and the hard work of our team - we have weathered the storm of COVID-19.

Applauding the availability of effective vaccines, we continued adapting our business practices; ensuring we maintained high levels of productivity while prioritizing the health and wellbeing of our United Way teammates and partners. After more than two years of working virtually, our staff transitioned into a comfortable ebb and flow at our headquarters on a hybrid schedule - to facilitate internal communication, enhance collaboration, and promote our organizational culture. We are yet reassessing the long-term implications for us of the pandemic-related shifts in the workplace. These shifts have also upended the traditional United Way campaign model and have caused a reimagining and reengineering of how we reach, inspire, engage, cultivate, and retain donors to our United Way. But, as you will see in these pages, we've successfully evolved to become a quintessential model of the "*new*" United Way!

Continuing to build upon our traditional funding relationships with high-performing not-for-profit organizations as a public charitable foundation, we have effectively broadened our focus from *transactional* grantmaking to also focus on *transformational* change in the lives of thousands of Mid-Southerners. Our ***Driving The Dream™*** network of over **100** partners delivers an interconnected system of services, facilitating equitable access to a multitude of programs and wrap-around supports that persons indicate they need to attain or regain financial self-sufficiency. Consequently, we now benefit from diversified revenue streams. Indeed, the corporate sector, public human services, education and healthcare all share a common objective - to improve the socioeconomic outcomes of so many of our neighbors who are struggling with multiple needs. In this season of economic turmoil, ***Driving The Dream™*** has become the way - ***the united way*** - to help individuals and families living in generational poverty and situational poverty "*move from where they are, to where they dream to be!*"

I'm constantly grateful for all you do for this United Way and for this community. You made the year "*that was*" - 2021-2022 - a year "*that has*" touched many lives, transforming thousands!

Thank you!

A handwritten signature in white ink, appearing to read 'Ken Robinson', written over a dark blue background.

United Way  of the Mid-South

DRIVING THE DREAM™

United Way of the Mid-South has evolved its mission to address the region's priority issue - poverty. United Way has pivoted from an entity principally mobilizing and disbursing funds to various local human services agencies, to one which *also* creates strategic funding alignment to advance economic mobility for individuals and families.

With our long history of work across multiple sectors, United Way of the Mid-South has been uniquely positioned to expand our mission by leading and operationalizing a network that capitalizes on our expertise and our relationship with human service providers.

United Way of the Mid-South has built an unduplicated system of multi-domain supports and services that provides families living in poverty the opportunity to grow their capacity, and to achieve social and financial mobility.

United Way of the Mid-South is focused on our mission to help individuals living in poverty achieve social and financial mobility with a coordinated approach to human service systems accountability which yields evidence-based outcomes. In 2021-22, *Driving The Dream™* (DTD™) partnered with 99 agencies, offering

240 different services, working together - **in a united way** - to address intergenerational poverty with an equal and intentional focus on parents and children. Our partners are advancing individuals and families toward self-sufficiency with support for housing, job training, quality childcare, youth development, health, and financial management. The good work being done in these domains that affect poverty is amplified by the seamless collective impact approach provided by **DTD™**.

Driving The Dream™ is supported by a 3-tier delivery system that includes Education and Outreach partners (Tier 3) which serve as **DTD™** connectors, educating people in need of **DTD™** services and directing them to the entry points for direct service providers. Referral Network partners (Tier 2) offer services and help to support individuals and families in need by providing warm hand-offs to other partner agencies. Care Coordination Hubs (Tier 1) provide case management for individuals and families in need of multiple services to address complex issues.

With stakeholders from healthcare providers, employers, educators, public human services agencies, and private philanthropy, *Driving The Dream™* continues to grow its network and expand the impact on the lives of individuals and families. Since 2018, **DTD™** has impacted thousands.

DTD™ IS TOUCHING THOUSANDS.

OVER	OVER	OVER
8K	10K	14K
REFERRALS TO DTD	ADULTS AND CHILDREN IMPACTED BY DTD	TOTAL PARTICIPANT INTERACTIONS THROUGH DTD CARE COORDINATION

DTD™ IS TRANSFORMING LIVES.

FOLLOWING 4 TO 6-MONTH **DTD™** CARE COORDINATION,
PERSONS SERVED BY **DTD™** REPORT:

OVER	OVER	OVER
44%	48%	66%
HAD MORE STABLE EMPLOYMENT	HAD BETTER FINANCIAL MANAGEMENT STRATEGIES	REPORTED HIGHER INCOME

DRIVING THE DREAM™ addresses the problem inherent in siloed human services delivery by creating and sustaining a system of care, incorporating partner agencies across multiple domains.



Scan to view our
[DTD Partner list.](#)



CALL **844-444-4211**

TOP REQUESTS THROUGH
THE DTD™ CALL CENTER



**SHELTER/
HOUSING**



**FINANCIAL
MANAGEMENT**

INCOME

**FOOD/
NUTRITION**

EMPLOYMENT

HELPING PEOPLE MOVE FROM WHERE THEY ARE, TO WHERE THEY DREAM TO BE.

When K. needed surgery, things began to spiral out of control - she lost income, was behind in rent, and faced eviction all while desperately trying to keep her children thriving in school. **Driving The Dream™** Care Coordinators assisted K. in creating a roadmap of her dreams with the help of multiple agencies. Through the **Driving The Dream™** network, K. received temporary housing assistance to avoid eviction, tuition assistance to support her education, and financial counseling to help her build a budget and long-term savings. K., and so many others, avoided the cycle of poverty by getting the right help at the right time. Today, K. is working full-time, pursuing her education, and building a bright future for her family.



— UNITED WAY OF THE MID-SOUTH —

COMMUNITY IMPACT

COMMUNITY IMPACT THROUGH GRANTMAKING

Community Impact is at the heart of United Way of the Mid-South's mission. By supporting and funding high-performing nonprofit agencies, United Way of the Mid-South is advancing our mission to address poverty across our eight-county service area, including: Shelby, Fayette, Lauderdale and Tipton counties in TN; DeSoto, Tate and Tunica counties in MS and Crittenden County AR.

Investments in United Way's Community Impact support agencies and programs doing the critical work daily to improve the lives of our neighbors. Funded agencies address issues such as child and youth development, job training, housing stability, and emergency services.

UNITED WAY OF THE MID-SOUTH EQUITY FUND

The **Equity Fund**, launched in 2022, supports grassroots and community-based organizations in Shelby County that are working to address disparities in diversity, equity, and inclusion which impact poverty. This aligned grant-making initiative focuses on organizations working at the neighborhood level where financial support can have the most immediate and transformative impact. In its inaugural year, the Equity Fund distributed **\$100,000** in funding to eight organizations.

Scan to view our
Partner Agency list.



COMMUNITY IMPACT IS TRANSFORMING LIVES

EMERGENCY SERVICES

Nearly 900,000 times Mid-Southerners received help through UWMS funded agencies or administered programs when facing emergency situations.

73,130

PEOPLE RECEIVED
FOOD OR MEALS

3,979

PEOPLE RECEIVED
CLOTHING

2,243

PEOPLE RECEIVED
FINANCIAL ASSISTANCE
TO OVERCOME
CHALLENGES DUE TO
DISASTERS

JOB READINESS

Adults and youth from middle school years through young adulthood gain the knowledge, skills and credentials to obtain family-sustaining employment.

5,791

ADULTS AND
YOUTH RECEIVED
EDUCATION OR
TRAINING TO
IMPROVE JOB
READINESS

96%

OF YOUTH
IN TRAINING
PROGRAMS GAINED
EMPLOYMENT

1,543

ADULTS COMPLETED
CERTIFICATION
PROGRAMS OR
INDIVIDUALS GAINED
EMPLOYMENT

YOUTH SUCCESS

Youth from middle school years through young adulthood gain the knowledge, skills and credentials to obtain family-sustaining employment.

46,623

YOUTH PARTICIPATED IN
SUCCESS PROGRAMS

99%

MAINTAINED
SCHOOL
ATTENDANCE

95%

OF SENIORS
GRADUATED ON TIME

COMMUNITY IMPACT IS TRANSFORMING LIVES

FINANCIAL STABILITY

Individuals/Families improve their socioeconomic status.

4,926

PEOPLE PARTICIPATED IN PROGRAMS DESIGNED TO INCREASE WAGES

84%

SUCCESSFULLY MAINTAINED STABLE HOUSING

82%

INCREASED THEIR FINANCIAL STABILITY THROUGH IMPROVED MONEY MANAGEMENT

IMPROVED MENTAL HEALTH

Individuals/Families have access to healthcare and improve their health outcomes.

2,544

PEOPLE RECEIVED COUNSELING

33,167

PEOPLE ACCESSED CRISIS INTERVENTION SERVICES FOR MENTAL HEALTH

87%

SHOWED EVIDENCE OF IMPROVED MENTAL HEALTH

HEALTHY LIVING

Individuals/Families improve their health.

8,161

CHILDREN AND ADULTS PARTICIPATED IN PROGRAMS TO IMPROVE PHYSICAL HEALTH

92%

ADOPTED IMPROVED BEHAVIORS FOR LONG-TERM HEALTHY OUTCOMES



GRANTS ADMINISTERED BY UNITED WAY OF THE MID-SOUTH

FOOD & SHELTER GRANT

Federal Emergency Food & Shelter Grant for Shelby County, TN and Crittenden County, AR. In the 2021-22 fiscal year, twenty-one agencies received over **\$462,000** in funding to provide food, emergency shelter, and assistance in paying rent/mortgage and utilities. This grant does not cover disaster relief, but is intended to support people who need immediate short-term help to avoid financial crisis.

CAPACITY-BUILDING

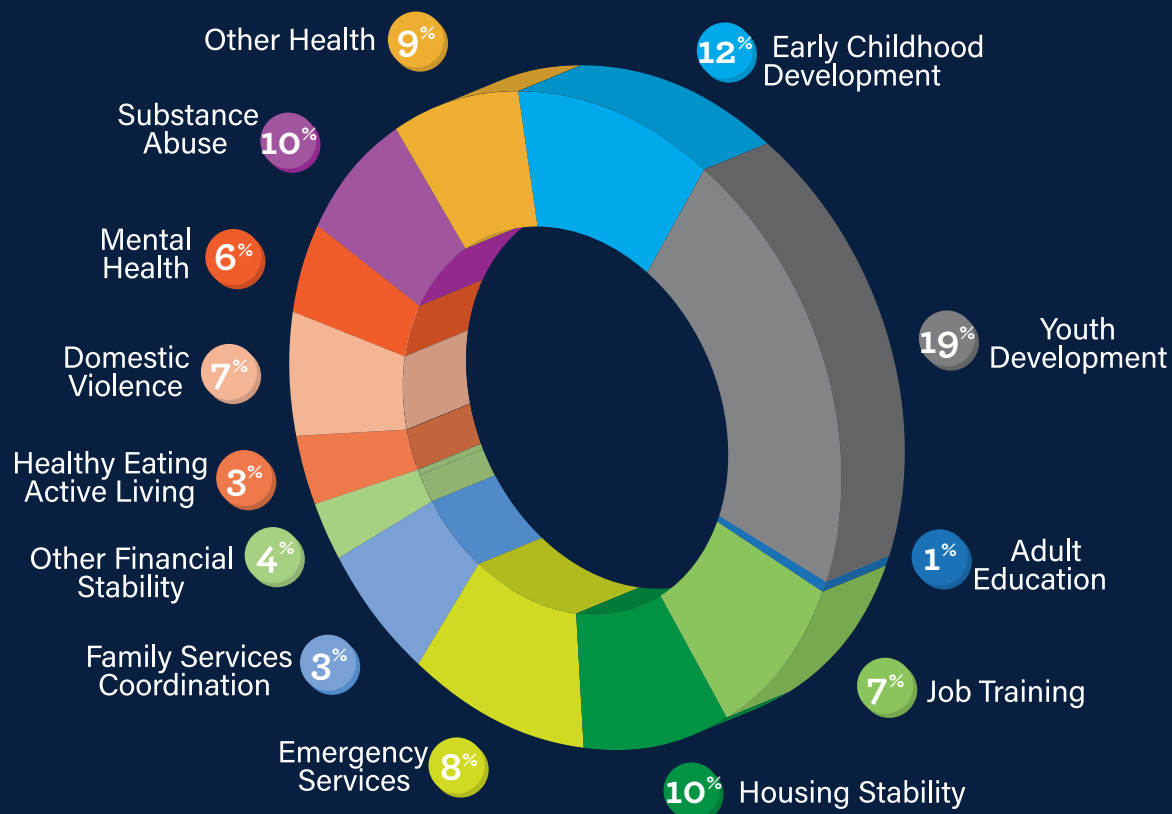
United Way of the Mid-South, in partnership with University of Memphis, facilitated the **Building a Trauma Sensitive Community** project to support human services providers in implementing trauma sensitive strategies, policies and practices within their agencies. Twelve organizations participated in this year-long commitment in 2021-22.

SINGLECARE

United Way of the Mid-South distributes SingleCare prescription drug cards to ease the cost burden of health care. In 2021-22 over **23,300** area residents used the SingleCare cards, saving a total of **\$2,264,832** on prescription medications.

2021-2022 COMMUNITY IMPACT FUND INVESTMENTS

During 2021-22, United Way of the Mid-South provided operational support to a total of **79** nonprofit, community-based agencies including **70** United Way agencies which received funding from UWMS.



OF THE TOTAL
225,077
PEOPLE SERVED

IN PROGRAMS FUNDED THROUGH COMMUNITY IMPACT GRANTS,
A REPORTED 76% WERE FROM LOW-TO-MODERATE INCOME HOUSEHOLDS.

CORPORATE PARTNERS

United Way of the Mid-South relies on the generous support of corporate partners who deliver on their citizenship goals with workplace giving campaigns that fund the collective work of United Way's aligned grantmaking. Through investments in United Way's mission, our valued partners and their employees donate generously through payroll deduction, corporate grants and sponsorships, and in-kind contributions.

Workplace giving campaigns to fund United Way's Community Impact helped over **225,000** people across the Mid-South who were served through **70** agencies and programs. United Way campaigns rely on the support of managers and **Employee Engagement Champions** who facilitate fun, engaging, and robust workplace campaigns. We are thankful for their enthusiasm as they share the message of United Way's mission and the vital role UWMS plays in the community.

Each year, many of our corporate partners select one or more of their valued employees to participate in the **Campaign Representative** program. Campaign Reps are an integral part of campaign season, serving as support for UWMS staff, while they build professional skills and networks. The Campaign Reps are trained extensively to represent UWMS in the community, in presentations to our current partners, and in meetings with prospective corporate partners. Their enthusiasm for United Way is contagious and is a vital part of our successful fundraising efforts.

UWMS TOUCHED THE LIVES
OF MID-SOUTHERNERS

279,390
TIMES

THROUGH OUR INITIATIVES, COMMUNITY
PARTNERSHIPS, TARGETED GRANT-MAKING
AND VOLUNTEER SERVICES



GEICO
CARES

GEICO employees volunteered
to service Catholic Charities'
Urban Garden.

\$FREE TAX-PREP

the key to possibilities

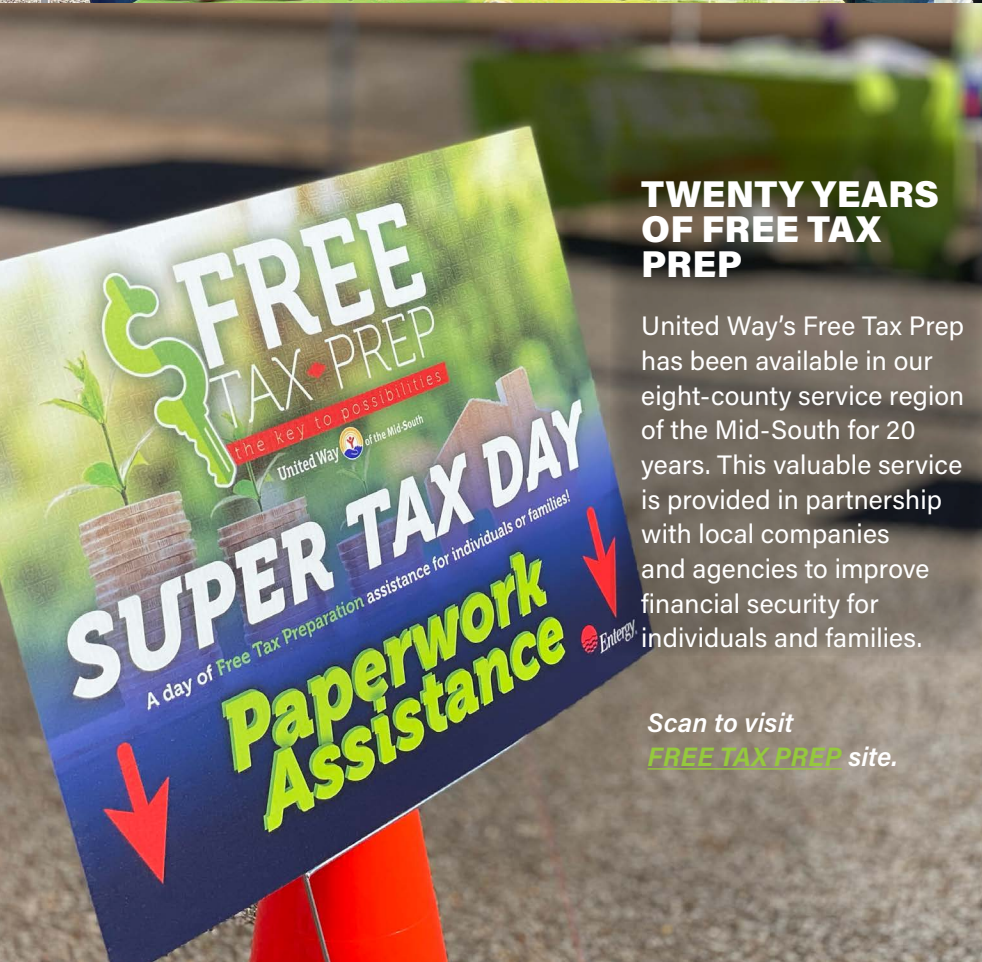
The **Free Tax Prep** program (FTP) is a direct service program of United Way of the Mid-South. In partnership with the IRS, UWMS provides trained volunteers at sites across the Mid-South to complete federal and state tax returns with no fees. This free service allows low- to moderate-income families to take full advantage of the **Earned Income Tax Credit** and maximize their return. In 2021-22 Free Tax Prep volunteers completed **9,395** returns returning over **\$15 million** to households, including **\$4.5 million** in Earned Income Tax Credit. Mid-Southerners saved over **\$2 million** in filing fees by using Free Tax Prep.

6-YEAR COMPARISON

Our efforts over the past years have produced significant results and an influx of **Earned Income Tax Credit** (EITC) dollars for individuals and families. The EITC is a refundable tax credit available to low-income working families and that can lead to dramatic reductions in childhood poverty.

Tax Filing Season	Customers Served	\$ Federal Refunds	\$ of EITC
2021 Tax Season	9,395	\$15 Million	\$5 Million
2020 Tax Season	11,337	\$17 Million	\$4 Million
2019 Tax Season	10,980	\$14 Million	\$5 Million
2018 Tax Season	10,276	\$12 Million	\$4 Million
2017 Tax Season	9,856	\$12 Million	\$4 Million
2016 Tax Season	9,394	\$13 Million	\$4 Million
Total FTP Impact	61,238	\$83 Million	\$26 Million





TWENTY YEARS OF FREE TAX PREP

United Way's Free Tax Prep has been available in our eight-county service region of the Mid-South for 20 years. This valuable service is provided in partnership with local companies and agencies to improve financial security for individuals and families.

Scan to visit
FREE TAX PREP site.

112

volunteers

ANSWERED THE CALL
ACROSS

21

sites

TO ENSURE FREE TAX
PREP ASSISTANCE WAS
AVAILABLE TO ALL
MID-SOUTHERNERS

\$15

million

RETURNED TO LOW-
INCOME HOUSEHOLDS



MEET DELORIS

I began volunteering with Free Tax Prep in 2016 as a Site Coordinator and in 2021, I joined the staff. Now I work seasonally as a Free Tax Prep specialist, helping to support all the sites. I return to United Way each year because I want to serve the public, I want to empower people to take charge over their finances, and because I enjoy the staff at United Way. A lot of seniors and others need the FTP service because it's free. They have lots of questions and we are able to put their minds at ease. The best part of my job is a thank you from a taxpayer after you've helped them. That's what it's all about!

- Deloris

ENGAGEMENT

United Way of the Mid-South lifts the community through volunteer opportunities for individuals and companies to participate in citizenship and capacity building for nonprofits across the region. Engagement includes volunteering your time and talent to read to children, clean a community garden, build accessible entries, or contribute to a collection drive for people in need.



UNITED WAY OF THE MID-SOUTH

VOLUNTEER UNITED

Volunteer United is the Mid-South's premier engagement portal. Nonprofits across the Mid-South, whether funded by United Way or not, may enter volunteer opportunities into this public database. Individuals or groups may sign-up to help within the portal. United Way of the Mid-South has connected thousands of volunteers with agencies and organizations in need of extra hands. Building the capacity of our local nonprofits allows those organizations doing outstanding work to expand their impact while holding down costs. You can find just the right volunteer opportunity at Volunteer United.

Scan to visit our [**VOLUNTEER UNITED**](#) portal.



ENGAGEMENT IMPACT

774

volunteers

THROUGH VOLUNTEER UNITED

\$150,505

economic impact

OF DONATIONS OF GOODS AND SERVICE

COMMUNITY ENGAGEMENT

STUFF THE BUS SCHOOL SUPPLY DRIVE

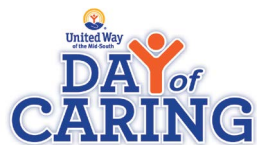
JULY 1-31, 2021



Students and teachers at Memphis-Shelby County Schools, and schools throughout the UWMS service region, started the year off right with new school supplies. Over **\$12,000** worth of school supplies was collected to offset the high cost of preparing students for a successful school year.

DAY OF CARING

SEPTEMBER 6, 2021



During a single **Day of Caring**, over **750** volunteers donated their time to serve at **15** nonprofit partners across the Mid-South. Our dedicated volunteers donated **3,370** hours of service valued at **\$87,700**. Several of our corporate partners held additional Day of Caring events and expanded the impact of United Way throughout the year.

TRUNK OR TREAT

OCTOBER 21, 2021



Over 1000 children and adults were able to enjoy the free festivities of **Trunk or Treat on Tillman Street** safely with a drive-thru event. Families received treats, a hot lunch, and helpful information. Thirty volunteers helped United Way fulfill its mission in the community even in challenging times.



UNITED WAY OF THE MID-SOUTH

WOMEN UNITED®

Women United is a powerful group of professionals and community leaders who support United Way of the Mid-South's Community Impact with an individual leadership donation. Most notably, they volunteer their time to advance the issues that affect women and families through projects, collection drives, education, and advocacy.

STUFF THE TRUNK

JULY 1-31, 2021



Women United's signature event, **Stuff the Trunk**, provides school supplies and dorm room amenities for each selected first-generation college student. Academically successful students who are unhoused or from low-income families benefit from the generous support to boost their success during their transition to college.

WOMEN HELPING WOMEN DOMESTIC VIOLENCE SUPPLY DRIVE

JULY 1-31, 2021



Women United *recognizes* that women who are escaping domestic violence often leave their homes with only their children and the clothes they are wearing. The **Women Helping Women Domestic Violence Supply Drive** and sorting event provides necessary items, such as toiletries, bedding, towels, and clothing to the YWCA Domestic Violence Shelter.

Scan to visit and join
WOMEN UNITED today!



FINANCIAL SUMMARY

United Way of the Mid-South, the region's largest public grant-making foundation, is committed to transforming the lives of individuals and families across the region through aligned grant-making and community investment. During FY 2022, United Way of the Mid-South changed accounting for Contributions Received to only reflect funds that are designated for UWMS. This change creates a net zero effect on the Statement of Activities. The \$3.4M loss reflected in the Statement of Activities is due to the loss in our investments and a delay in the execution of approved grants.

United Way of the Mid-South remains committed to those we serve. Please join us in the fight for economic self-sufficiency and "opportunity for all".

Text **POVERTY to 40403**
or scan this code to give.



STATEMENT OF ACTIVITIES JULY 1 — JUNE 30

Revenue	2022	2021
ANNUAL CAMPAIGN		
Contributions Rec'd	\$7,832,474	\$11,069,513
Less Donor Designations	-\$976,835	-\$1,642,521
Less Provisions For Noncollectable Pledges	-\$504,052	-\$478,990
	\$6,351,587	\$8,948,002
Investment Income (Loss)	-\$1,826,771	\$1,660,676
Endowment Contributions	-	\$5,000,000
Change In Trust	-\$133,861	\$142,273
Other Contributions	\$278,738	\$244,372
Ppp Loan Forgiveness	\$831,667	\$796,867
Grants And Contracts	\$1,791,080	\$2,911,136
Miscellaneous Income	\$4,025	\$4,515
Total Revenue	\$7,296,465	\$19,707,841
Expenses	2022	2021
PROGRAM SERVICES		
Allocations To Agencies	\$4,610,744	\$6,331,429
Less Donor Designations	-\$976,835	-\$1,642,521
Net Funds Distributed	\$3,633,909	\$4,688,908
Community Service	\$3,124,515	\$2,903,978
Grant Expense	\$1,624,129	\$1,810,702
Total Program Services	\$8,382,553	\$9,403,588
SUPPORTING SERVICES		
Fundraising	\$583,646	\$636,559
Management & General	\$1,698,065	\$1,510,878
Total Supporting Services	\$2,281,711	\$2,147,437
Total Expenses	\$10,664,264	\$11,551,025



of the Mid-South

1005 Tillman Street, Memphis, TN 38112

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