

UNITED IS THE WAY TO BUILDING A BRIGHTER FUTURE



2024 ANNUAL REPORT

LETTERS FROM

REV. KENNETH S. ROBINSON, M.D.

A time of transition is both bittersweet and exciting.

As we closed the 2023-24 fiscal year in June, I announced my retirement as President & CEO of United Way of the Mid-South. This time for me is both bittersweet and exciting. I have spent my career as a physician, a pastor, a human service entrepreneur, a public health care director, and here, at United Way of the Mid-South, as the leader of a human services sector disruptor.

This is an exciting time for United Way. We are now in our second century of service in a region that continues to need the critical investments in high-performing agencies that provide programs to support families and help this community build a brighter future. We now have the promise of a new and transformational network of service providers in Driving The Dream™. I am proud to see what we - together, in a united way - have accomplished in creating a national model for human service delivery that truly transforms the lives of individuals and families living in poverty.

I am confident that your United Way, in partnership with you - our investors, donors, stakeholders, and partners - will continue to improve the lives of individuals, children, and families, and create a community where we all can thrive.

REV. KENNETH S. ROBINSON, M.D.



TOMEKA HART WIGGINTON, PRESIDENT & CEO

I am honored to step into the role of President & CEO of United Way of the Mid-South at this time of growth and expanded impact in our community. The future is bright for United Way and for the hundreds of thousands of Mid-Southerners served by our initiatives and programs to address poverty. We know that collective impact starts with individual effort. I'm heartened by the support of United Way's partners and eager to meet with new partners.

We are in this work together and by leveraging talent and innovation across multiple sectors, we can make big dreams come true for thousands of our neighbors and their families.

United is the Way.

TOMEKA HART WIGGINTON



DARRELL COBBINS, CHAIR OF THE BOARD OF DIRECTORS

This year, United Way of the Mid-South moved boldly to deliver on our mission with an expanded base of partnerships in Driving The Dream™ and investment in programs to support our community's most vulnerable citizens.

The Board of Directors moved forward with a leadership transition to build upon the enormous impact made by Dr. Robinson and his vision for United Way of the Mid-South. Thanks to his leadership over the past nine years, United Way has strengthened its financial position with diversified revenue streams. Driving The Dream, an unduplicated system of support for families moving out of poverty, has expanded its reach through dedicated partners delivering social service innovations with the support of an \$18.2 million Families First Community Grant from the Tennessee Department of Human Services.

As we move to the next chapter for United Way of the Mid-South, we offer a warm welcome to Tomeka Hart Wigginton. Tomeka brings vast experience in improving education outcomes and increasing the social and economic mobility for individuals and families. Her experience in building strategic partnerships for fund development and service delivery will be critical to our continued transformational impact on our community.

I invite you to join us in building a brighter future for Memphis and the Mid-South.

DARRELL COBBINS

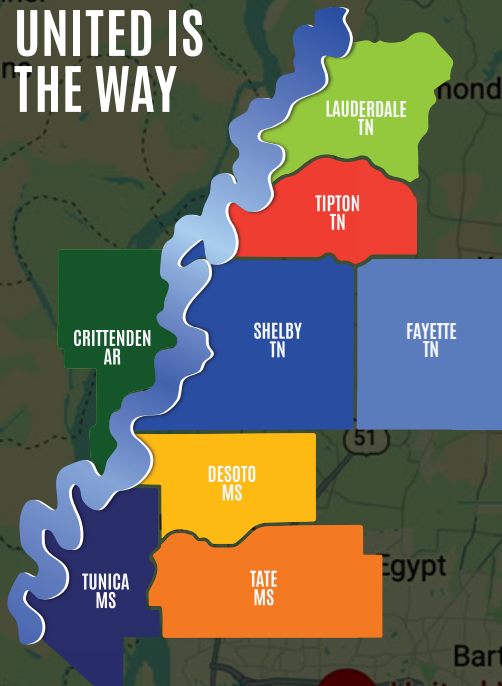
BOARD OF DIRECTORS

as of October 2024

United Way of the Mid-South is grateful for the unwavering support of our Board of Directors. Through an investment of their time, talent, and treasure, each Board member contributes to the advances that we are facilitating in the lives of individuals and families across the Mid-South.

DARRELL COBBINS, Chair, Universal Commercial, LLC
KEVIN BRADSHAW Memphis AFL-CIO Central Labor Council
MARTIA BROWN Enterprise Mobility
REGGIE CRENSHAW Cigna Healthcare
REBECCA CULLISON Methodist LeBonheur
JOHN DANIEL First Horizon, Retired
ION PAUL DAVIS HHM CPAs & Advisory Services
TAMMY ALEXANDER-EPPS Amazon
BRETT HARRIS GEICO
SCOTTY HENDRICKS New York Life Insurance
EVAN IVERSON Frontdoor
MARY ANN JACKSON Baker, Donelson, Bearman, Caldwell & Berkowitz
MELANIE A. KELLER Meritan, Apelah & Generations, Inc.
DOUG MCGOWEN Memphis Light, Gas and Water
DAVID MAY Regions Bank
JEAN M. MORTON Truist Bank
NIQUALUS NIBLEY IBEW Local 474
JEFF PETERSON Valero Memphis Refinery
JOHN PETTEY, III Raymond James
JOSH POAG Poag Development Group
AYOKA POND Baptist Memorial Health Care Corporation
ERIN PRYOR First Horizon Bank
BEVERLY ROBERTSON Trust Marketing
REV. KENNETH S. ROBINSON, M.D.
United Way of the Mid-South
LETICIA TOWNS Regional One Health
KEITH TOWNSEND International Paper
KEVIN WOODS BlueCross BlueShield of Tennessee
RICHARD WRIGHT Ernst & Young, LLP

UNITED IS
THE WAY



SERVING THE MID-SOUTH

United Way of the Mid-South serves Shelby, Fayette, Lauderdale and Tipton counties in Tennessee; DeSoto, Tate and Tunica counties in Mississippi and Crittenden County Arkansas

United Way of the Mid-South is helping individuals and families across the region move out of poverty and build a brighter future for themselves and their children.

United Way aligns the work of 229 community partners across our eight-county service region with programs in child care, youth development, affordable housing, job training, healthcare, victim assistance and more.

In 2023/24, United Way touched the lives of Mid-Southerners 422,371 times through grantmaking to local agencies, Driving The Dream™, Free Tax Prep, community training, partnerships, and volunteer services.

COLLECTIVE EFFORT CREATES SIGNIFICANT IMPACT

DRIVING THE DREAM™

BUILDING A LEGACY OF PROSPERITY FROM ONE GENERATION TO THE NEXT.

Driving The Dream™ (DTD™) is committed to breaking the cycle of generational poverty by connecting people with a network of services to meet their immediate needs and build their long-term financial and social mobility.

In May 2023, United Way of the Mid-South was awarded an \$18.2 million Families First Community Grant from the Tennessee Department of Human Services. This extraordinary investment sets Driving The Dream on a trajectory to impact over 5600 more families (14,000 adults and children) in two years, and positions United Way of the Mid-South as the lead innovator in collaborative large-scale human service delivery systems.

Working through a network of nearly 200 human service agencies, hospitals, schools, and faith-based organizations, Driving The Dream connects people with a network of services to help them move toward the life of which they dream. Our partners are advancing individuals and families with support for housing, job training, quality childcare, youth development, health, transportation, and financial management.



The good work being done in these domains that affect poverty is multiplied through the collective impact approach provided by DTD.

With a shared data platform, Driving The Dream participants may consent to enter our system of care where they can be seamlessly referred to and helped by other agencies in the DTD network. Their successes, setbacks, and additional needs are consistently observed so that support is offered to keep them on track to achieve their goals. A shared care model ensures that all participants, no matter which agency they are served by, receive equitable access to care, and each participant is treated with dignity and respect. The Driving The Dream network is easy to access through the DTD Call Center, an online referral form, a community kiosk, or at a participating partner agency.

Driving The Dream seeks to build the well-being of families by intentionally and simultaneously working with children and adults in their lives together. By focusing on the health, safety and academic success of students, as well as the financial stability of families, we build a legacy of advancement and prosperity from one generation to the next.

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

in 2023
- 2024

5,716
calls responded to by
Driving The Dream
Call Center

25,742
total referrals in the
Driving The Dream
Network

23,060
total people served

participants
self-report

59%
improvements in
HOUSING

42%
improvements in
INCOME

42%
improvements in
LIFE SKILLS

38%
improvements in
CHILDCARE

CALL CENTER
844-444-4211

This project is funded under a Grant
Contract with the State of Tennessee.



SHELBY COUNTY SERVICES AT YOUR FINGERTIPS

United Way of the Mid-South has partnered with the Shelby County Division of Community Services to provide service kiosks throughout Memphis and Shelby County. The kiosks, located in easily accessible public locations, provide an easy-to-use portal to request County services and connect with the Driving The Dream™ network of services.

Shelby County Services include:

- Utility and rent mortgage assistance
- Crime and rape victims services
- Food bank assistance
- Housing assistance
- Veterans benefits assistance
- Mental health treatment services
- Rental and mortgage assistance

Kiosks are currently available at the following locations:

- Gaston Community Center
- Orange Mound Community Center
- Hickory Hill Community Center
- Westwood Community Center
- Bert Ferguson Community Center
- Ed Rice Community Center
- Binghampton Community Development Corporation
- Shelby County Office of Reentry
- Raleigh Public Library
- Benjamin L. Hooks Central Library
- Whitehaven Georgette and Cato Johnson YMCA
- Bickford Community Center
- Collierville Public Library



UNITED IS
THE WAY



BENEFIT KITCHEN

United Way provides **Benefit Kitchen**, a new and innovative text service, to connect Tennessee residents with the government benefits they qualify for. Through a series of short questions sent via confidential text messages, Benefit Kitchen pre-qualifies individuals for services, such as SNAP, child care assistance, tax credits, high speed internet, and more. In 2023/24 1304 household members used the Benefit Kitchen service.

Text BENEFITS to 211-211



FREE TAX PREP

Supporting financial stability with free service and education.

In partnership with the IRS, United Way of the Mid-South provides trained volunteers at sites across the region to complete federal and state tax returns with no fees. For over twenty years **Free Tax Prep** has helped low and moderate income households move toward financial stability by maximizing their refunds, taking full advantage of the Earned Income Tax Credit, and saving families the high cost of tax filing fees. The Earned Income Tax Credit is the federal government's most significant poverty-fighting program, boosting the income for low-wage workers and off-setting federal income tax.

2023-24 Free Tax Prep Impact

The individuals and families served by Free Tax Prep are often the most at-risk of predatory filing services. United Way's clients have an average adjusted gross income of \$29,784. With the help of Free Tax Prep trained preparers, clients received an average Earned Income Tax Credit of \$1,993 and an average refund of \$1,641. A refund of 5.5% of household income greatly impacts the financial health of people who need help the most.

127
volunteers

19

Free Tax Prep sites
available to all Mid-
Southerners

10,032
families served

\$11.2m
Total Refunds

13,711
individuals benefited
from Free Tax Prep
services

\$2.2m
in tax preparations
fees saved

\$3m
in Earned Income
Tax Credits

COMMUNITY IMPACT

Equitable funding for communities in 8 Mid-South counties.

The **Community Impact Fund** at United Way of the Mid-South supports 59 agencies with grant funding. Of the 224,425 people served through programs funded by Community Impact grants, 85% are from low-to-moderate income households. The pillars of support in financial security, healthy communities, youth opportunity, and community resilience provide the framework for our grant-making and community programs.

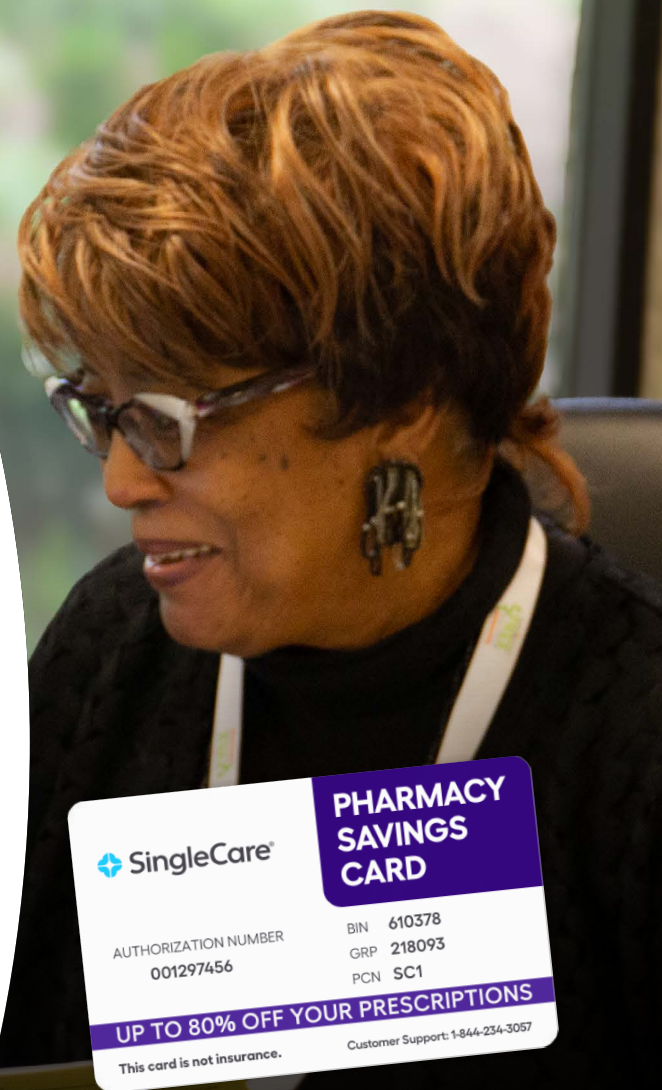
Sixteen Equity Fund grantees, providing grassroots efforts, received funding to address the root causes of racial disparities in our city's most vulnerable neighborhoods.

United Way of the Mid-South administers Federal Emergency Food and Shelter Grants for Shelby County and Crittenden County on behalf of the Federal Emergency Management Agency. The allocated grants provide food, emergency shelter, utility assistance and assistance paying mortgages/rent. This funding is not designated for disaster relief, but rather to assist families facing unexpected crises. In 2023/24, United Way administered \$438,567 in funding for 19 agencies.

FINANCIAL SECURITY

United Way of the Mid-South leads and funds a variety of services that increase income security and improve financial management, transforming the lives of individuals and families. When families thrive, communities thrive.

2,219	Getting Job Ready
	adults received job readiness training to become employed
1,208	of individuals became employed.
626	people participated to earn certifications, licenses or credentials
430	participants completed the programs
2,896	Improving Financial Stability
	people completed money management classes
76%	increased their financial stability
17,271	people received services to increase disposable income
97%	increased their disposable income
3,766	people received services to increase housing stability
76%	successfully maintained stable housing



 **SingleCare®**

To ease the cost burden of health care, UWMS distributes SingleCare prescription drug cards. 23,311 Memphis Metro residents used SingleCare cards saving a total of \$2,113,628 on prescription medications.

HEALTHY COMMUNITY

Healthy living is negatively impacted by poverty, leading to chronic illness and lower life expectancy. Poor health limits a person's ability to retain employment, and poverty limits access to preventative health care. Improvements in health translate into improved economic mobility. Healthy people, build healthy lives.

Healthy Eating/Active Living

10,668 people participated in programs to improve physical health

95% adopted healthier behaviors

Improved Physical Health

84% of babies had healthy birth outcomes

5,863 Mid-Southerners received guidance in treating potential poisonings

Improving Mental Health

35,465 people received support to improve mental health

97% improved mental health

44,755 people accessed crisis intervention services

Addiction Services

492 adults and youth received treatment for substance misuse

90% reported abstinence from alcohol and illicit substances

Healthy Decision Making

3,007 youth participated in programs designed to improve decision making behaviors resulting in reduction in risky and/or delinquent behavior

95% improved in these "soft skills"

Domestic Violence

3,452 adults and children received services to escape and/or recover from traumatic domestic violence

1,269 people built skills to prevent child abuse



YOUTH OPPORTUNITY

United Way of the Mid-South invests in early childhood services to ensure that children receive a foundation for life success. Continued support throughout childhood encourages academic success and a healthy, bright future in adulthood.

Engaged Parents

3,325 parents and children benefited from activities to increase parent engagement in their children's education

78% of parents demonstrated improved skills for effective parenting

Early Intervention

847 children with, or at high risk for developmental delays, participated in high quality early childhood education classes

84% of the children met appropriate developmental milestones

86% of children entering Kindergarten were proficient on school readiness assessments

Academic Successes

2,719 children in Kindergarten through 3rd grade received early literacy support

76% were reading on grade level by the end of the program year

92% of participants earned passing grades in core subject areas in programs that emphasized academic achievement

98% of high school seniors graduated on time

COMMUNITY RESILIENCE

United Way of the Mid-South builds community resilience by funding services that help stabilize families in crisis and by increasing access to human services.

Addressing the Digital Divide

United Way of the Mid-South supported the expansion of a computer lab at the YWCA Domestic Violence Shelter.

102 students had access to the technology needed to complete their schoolwork.

Emergency Services

Mid-Southerners received help when facing emergency situations through United Way agencies and the Emergency Food and Shelter Program administered by UWMS.

131,214 people received food through food pantries, gift cards, home delivered meals and congregate meals

16,801 people received clothing

4,755 people received emergency shelter services

1,010 households received help with rent or mortgages

749 people received free legal services that increased safety, housing and/or financial stability

Fire protection was provided to 5,900 residents of Tate County. Volunteers reported to 166 fire and medical calls.



UNITED IS THE WAY

COMMUNITY ENGAGEMENT

United Way of the Mid-South provides engagement opportunities through volunteerism, collection drives, community festivities, and much more. The mission of our engagement is to address community needs and provide support for partner agencies and their programs.



United Way of the Mid-South
PRESENTS

STUFF THE BUS

Stuff the Bus school supply collection drive was held in partnership with Memphis Shelby County Schools (MSCS) with support from United Way's corporate supporters. Collection boxes were available at partner locations throughout the month of July. Volunteers and staff from United Way and MSCS counted and tallied the supplies that were provided to students and teachers across the district. United Way collected nearly 30,000 individual items valued at over \$230,000.

United Way
of the Mid-South

DAYS of CARING

Days of Caring was held across multiple locations in April to launch Volunteer Month. We welcomed 147 volunteers who participated in five service opportunities and contributed over \$10,000 in volunteer effort value. A collection drive for the YWCA's domestic violence shelter resulted in a donation of 860 items valued at over \$3,500.



COMMUNITY ENGAGEMENT



Trunk or Treat is United Way of the Mid-South's largest single event that drew over 3200 people in 2023/24. The event held at United Way Plaza provides families with a safe and free festival. Children, dressed in costume, visited decorated trunks and enjoyed face painting, a game truck, rock climbing, photos with characters and more! Services were available, such as vaccinations, Amazon employment recruitment, My City Rides, and a free hot lunch was provided to all attendees.





United Way of the Mid-South was proud to be named the community partner for the Southern Heritage Classic. United Way provided information about Driving The Dream™ and Free Tax Prep with attendees, most of whom were Shelby County residents. The Driving The Dream kiosk was on hand for connection to Shelby County services and participants had the opportunity to sample the hard choices that people in poverty make everyday with the United Way poverty simulation experience.



2023/24 FINANCIAL REPORT

2-YEAR COMPARISON

United Way of the Mid-South, the region's largest public, exclusively grant-making foundation, is committed to transforming the lives of individuals and families across the region through aligned grant-making and community investment. United Way of the Mid-South accounts for Contributions Received to only reflect funds that are designated for UWMS.

Join us in our mission to help families move toward financial stability and self-sufficiency.

**TEXT UWMS TO 40403
OR SCAN THE CODE.**



Revenue	2024	2023
Contributions Received	\$5,837,448	\$7,657,736
Less Agency Donor Designations	-\$489,761	-\$495,322
Less Uncollectible Pledges	-\$406,322	-\$9,287
Subtotal	\$4,941,365	\$7,153,127
Investment Income	\$1,106,000	\$1,003,215
Change in Beneficial Interest in Trusts	\$65,568	\$10,324
Grants/Contracts	\$6,092,017	\$2,542,589
PPP Loan Forgiveness	—	—
In Kind Donations	\$108,963	\$142,286
Misc. Income	\$79,779	\$1,950
Other	\$244,843	\$206,206
Total Revenue	\$12,638,535	\$11,059,697

Expenses	2023
Program Services	
Community Impact Grants and Other Grants	\$4,185,860
Less Donor Designations	-\$489,761
Total Community Impact Grants	\$3,696,099
Community Service	\$3,151,953
Grant Expenses	\$5,492,730
Supporting Services	\$1,931,065
Total Expenses	\$14,271,847
Net Increase (Decrease) in Net Assets	-\$1,633,312
Net Assets, Beginning of Period	\$14,414,530
Net Assets, End of Period	\$12,781,218





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