



United Way
of the Mid-South

2019-2020

ANNUAL REPORT

July 1, 2019 – June 30, 2020

LIVE UNITED[®]





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MELANIE KELLER

President and CEO, Meritan Inc.
United Way Board Member
President, United Way Agency Executives Association

“AS THE REPRESENTATIVE FOR THE UNITED WAY AGENCY EXECUTIVES ON THE BOARD OF DIRECTORS OF UNITED WAY OF THE MID-SOUTH, I AM PRIVILEGED TO SEE FIRST-HAND THAT UNITED WAY AGENCIES HAVE THE BENEFIT OF A GROUP OF INFLUENTIAL, PROFESSIONAL VOLUNTEERS WHO ARE DEDICATED TO SUPPORTING A VAST ARRAY OF SERVICES PROVIDED BY NONPROFITS IN OUR COMMUNITY, AND ARE INVESTED IN THE WORK OF UNITED WAY. OUR ORGANIZATIONS WHICH ARE PART OF THE UNITED WAY NETWORK HAVE UNIQUE OPPORTUNITIES FOR COLLABORATION, AND THE ABILITY TO WORK IN PARTNERSHIP WITH THE EXECUTIVE LEADERSHIP OF UNITED WAY TO PRODUCE A GREATER IMPACT FOR THOSE WE SERVE. WE TRULY ARE STRONGER TOGETHER - UNITED. I SPEAK FOR ALL OF THE EXECUTIVES OF UNITED WAY AGENCIES, IN HEARTILY ENDORSING UNITED WAY'S COMMITMENT TO MEET PEOPLE WHERE THEY ARE, AND TO HELP GET THEM WHERE THEY NEED AND WANT TO BE.”





LETTER FROM THE CHAIRMAN OF THE BOARD

SCOTT FOUNTAIN

Senior Vice President and Chief Development Officer of Baptist Memorial Health Care
Chairman of the Board, United Way of the Mid-South

As I reflect on my time as Chairman of the Board for United Way of the Mid-South, I have seen this organization grow and evolve into an even stronger force in the nonprofit community. United Way's signature initiative, **Driving The Dream**, continues to serve as the backbone for much of the work done with individuals and families as they advance from poverty to prosperity. This unprecedented, inter-agency network breaks down the walls of siloed services and systemic barriers to create equitable access to the supports needed by so many in our community to truly achieve economic advancement.

This year, United Way made pivotal changes in the face of many uncertainties; remaining true to our mission to improve the lives of Mid-Southerners. The COVID-19 pandemic greatly impacted nonprofits that depend on United Way for a portion of their funding. As the need increased, we found creative ways to support these agencies; including establishing an Economic Relief Fund to allow corporate partners and donors the opportunity to provide additional resources to the relief efforts of nonprofits. United Way of the Mid-South also showed tremendous resourcefulness in opening up the assets provided by **Driving The Dream** to the public for the first time, with the Relief Call Center powered by **Driving The Dream**. Finally, we received national acclaim for our Free Tax Prep Program's innovative, low-risk, no-touch Drive-Thru, Drop-Off solution for low income individuals who truly needed their IRS tax refunds from the returns we expertly helped them prepare. In the midst of this pandemic, our United Way rose to the occasion.

Having served as Chairman of the Board of United Way of the Mid-South during this time, I am very proud of our United Way's dedication and responsiveness in finding new ways to support our most vulnerable neighbors. I am also exceptionally proud of our United Way's commitment to being nimble and flexible in the face of the unforeseen adversity of such a devastating health and economic crisis. Thank you for joining me in supporting this United Way, as we continue to make a difference in the lives of so many Mid-Southerners.

Sincerely, 

BOARD OF DIRECTORS

- SCOTT FOUNTAIN**, Chairman of the Board, Baptist Memorial Health Care
- CHRISTOPHER ANDERSON**, Enterprise Holdings
- R. SCOTT BARBER**, Horseshoe Casino and Hotel
- SHANNON A. BROWN**, FedEx Express
- IRVIN CALLISTE**, Memphis, AFL-CIO Labor Council
- DARRELL COBBINS**, Universal Commercial, LLC
- JERRY COLLINS**, Community Volunteer
- ROLAND CRUICKSHANK**, Methodist University Hospital

- CATHY CULNANE**, AutoZone
- MIKE EDWARDS**, Paragon National Bank
- J.W. GIBSON**, Gibson Companies
- JEFFERY GREER**, FedEx Freight
- ALISA HAUSHALTER, D.N.P.**, Shelby County Health Department
- MARY ANN JACKSON**, Baker Donelson
- MICHAEL JUNG**, The Commercial Appeal
- MELANIE A. KELLER**, Meritan
- URSULA MADDEN**, City of Memphis
- DAVID MAY**, Regions Bank
- JEAN M. MORTON**, SunTrust Bank
- JOHN PETTEY, III**, Raymond James

- NATALINE PURDY**, Consumer
- KENNETH S. ROBINSON, M.D.**, United Way of the Mid-South
- CATHY SLATER**, International Paper
- RANDY STOKX**, Deloitte Services LP
- CHARLES THOMAS**, AT&T
- LETICIA TOWNS**, Regional One Health
- JOSH TULINO**, Valero
- CHRIS VANSTEENBERG**, First Horizon
- CRAIG L. WEISS**, Tower Ventures
- KEVIN WOODS**, BlueCross BlueShield of Tennessee
- RICHARD WRIGHT**, Ernst & Young LLP
- J.T. YOUNG**, Memphis Light, Gas & Water



LETTER FROM THE PRESIDENT & CEO

REV. KENNETH S. ROBINSON, M.D.

President and CEO, United Way of the Mid-South

I am pleased to deliver this 2019-2020 Annual Report of the United Way of the Mid-South. This year, we have begun to informally refer to our United Way as “a convener of funders, fighters and followers who join us in our pursuit to break the cycle of generational poverty, by creating economic advancement and opportunity for all.” Indeed, when you consider the traditional pillars of our work – health, education and financial stability – they all point to, contribute to, roll up into “helping people move from where they are to where they dream to be.” Remember that phrase. In a time of socioeconomic disparities and social disruptions, it sums up the essence of who we are today and what we do. We don’t only make *transactional* grants, we *transform* lives. We are fostering and building a nonprofit community of collaboration and collective action; to work together, in a “united way”, to literally *drive* the dreams of the people who were assisted over 300,000 times this year by programs we funded.

Certainly, at our core, we are a public charitable foundation; dependent on scores of companies large and small, and over 23,000 individuals like you – the *funders* – to support our grant-making to a panoply of high-performing nonprofits – the *fighters*. Many others in our community join our donors in being personally engaged, attending events, advocating, mobilizing in-kind resources and volunteering on behalf of United Way and our partner agencies. Because our community impact work is year-round, not just about fundraising during campaign season, these individuals – the *followers* – are fundamental to elevating our *visibility* in the community, accentuating our *value* as a trusted intermediary, thereby undergirding our long-term organizational *viability*.

In this Annual Report, you will be immersed in the means and modes, the outcomes and impact of your United Way during this reporting period. Of course, by the end of the third quarter of the year, we accompanied you through the door of a devastating global pandemic. Unequivocally, COVID-19 has irrevocably changed the way our United Way does business - in many ways, for the better. As has occurred with many of our corporate partners, the crisis has accelerated our use of technology, and amplified our practical and functional shift to virtual formats of communication and interaction. More importantly, when countless Mid-Southerners suffered or succumbed to the physical ravages of the novel coronavirus, lost jobs or gigs or work hours, or have been pushed over the edge into situational poverty – many for the first time ever – our United Way has been able to pivot, be nimble and flexible, and mount a robust, adaptive response to assist those adversely impacted, and to bolster those nonprofits in our community providing urgently needed relief services.

We became even more laser-focused in our aligned grantmaking through our Community Impact Fund; not only to improve the quality of life for the nearly 200,000 persons in the Mid-South living in generational poverty, but also to shore up the lives of many individuals and families who have been pushed over the edge by the pandemic into financial instability. I was truly grateful for the support we received from all sectors to aggressively attack the devastating consequences of COVID-19; including corporate partners, private philanthropy, those donors who made contributions to us for the very first time, and surely our United Way staff and our Board who generated and endorsed non-traditional, effective means of continuing our endeavors. In the following pages, you’ll read about our COVID-19 Economic Relief Fund, the unprecedented pandemic-related adaptations of our Free Tax Program, and the Relief Call Center – powered by *Driving The Dream* – which we urgently stood up to provide public access to the life-transforming work of connecting people to critical services.

It has been such a tough year for so many in our community, and for so many nonprofits on the front lines addressing an unprecedented surge in need. Clearly, the pivotal, unduplicated role of our United Way is essential these days more than ever; even as we serve our neighbors who have never before sought assistance. Thank you for appreciating, promoting, praying for and donating to the United Way of the Mid-South!

Sincerely,

A handwritten signature in black ink, appearing to read "Ken Robinson", written over a white background.

COMMUNITY IMPACT OVERVIEW

United Way of the Mid-South is committed to addressing priority issues in our community, namely the growing number of families experiencing generational poverty. The 2019 Poverty Report, created by The University of Memphis, shows that 27.8% of Memphians and 44.9% of Memphis children live in poverty. We find these statistics to be unacceptable. To be a part of breaking the cycle of generational poverty – particularly during these challenging times – we feel required to act with a sense of urgency; leading the charge for economic justice, providing financial support to nonprofit agencies in our community, and driving the dreams of individuals and families throughout the Mid-South.

As the critical nature of the COVID-19 pandemic became evident in our community, United Way of the Mid-South mounted a response with a three-fold purpose: to provide immediate support to nonprofits addressing the most essential community needs related to the pandemic; to provide long-term recovery support to United Way partner agencies in their continued and even more vital work; and to provide pivotal and timely support for our adaptive response efforts to meet the ongoing influx of need in our community.

Addressing priority issues has been the work of our United Way since our inception. While the priorities may have changed throughout the years, our focus, passion and desire to effectively serve never wavers. Even while we care for the most basic needs of individuals and families in the Mid-South, we are uniquely positioned to pivot and respond to new needs that impact our most vulnerable neighbors.

✓ PROVIDE IMMEDIATE SUPPORT TO NONPROFITS ADDRESSING THE MOST ESSENTIAL COMMUNITY NEEDS RELATED TO THE PANDEMIC

✓ PROVIDE LONG-TERM RECOVERY SUPPORT TO UNITED WAY PARTNER AGENCIES IN THEIR CONTINUED AND EVEN MORE VITAL WORK

✓ PROVIDE PIVOTAL AND TIMELY SUPPORT FOR OUR ADAPTIVE RESPONSE EFFORTS TO MEET THE ONGOING INFLUX OF NEED IN OUR COMMUNITY

27.8%

of people
in the City of Memphis
live in poverty

18.8%

of people
in our AR, MS, TN metro
area live in poverty

21.7%

of people
in Shelby County live
in poverty

34.6%

of children
under 18 in Shelby County
live in poverty

THE US AVERAGE FOR PEOPLE LIVING IN POVERTY IS 12.3%. THE 2019 UPDATE OF THE MEMPHIS POVERTY FACT SHEET, PRODUCED ANNUALLY BY DR. ELENA DELAVEGA OF THE SCHOOL OF SOCIAL WORK AT THE UNIVERSITY OF MEMPHIS. DATA FROM THE 2019 AMERICAN COMMUNITY SURVEY RELEASED IN SEPTEMBER 2019.

A photograph of a woman with blonde hair and two children, a young boy and a girl, looking off to the side. The woman is in the background, and the children are in the foreground. They are all looking towards the right side of the frame. The background is a soft-focus outdoor setting with trees and a cloudy sky.

MEET MS. C

Earlier this year, Ms. C lost her job in the midst of the COVID-19 pandemic. She was referred to a *Driving The Dream* Care Coordination Hub for food and housing assistance.

Beyond the immediate need for food and stable housing, Ms. C desperately wanted to regain custody of her children. Having employment and housing were vital to her regaining custody.

No job, no home, hungry, worried about her kids. This is what many of our *Driving The Dream* clients face on a daily basis.

During orientation, Ms. C was able to translate her despair and anxiety into a sense of urgency to move forward. The process helped her make some decisions with the help of her Care Coordinator. Ms. C is now in a secure housing and food situation with the ability to receive her children back in her home, and she is focusing on finding a job that will help her move from where she is to where she dreams to be.

630,596

meals were provided to 63,000 people
through United Way's Economic Relief Fund.

UNITED WAY'S RESPONSE TO COVID-19

United Way of the Mid-South quickly stood up our COVID-19 Economic Relief Fund, providing supplemental funds for health and human service organizations which experienced a surge in demand from our neighbors significantly impacted by this crisis. In addition, we instituted a first-in-the-nation, low-risk, socially-distanced, Drive-Thru Drop-Off service for our IRS-certified Free Tax Prep program; allowing us to still prepare tax returns – for free – for low income families who truly needed their refunds, given the disruptions to our economy. Finally, we instituted the Relief Call Center, powered by *Driving The Dream*, to support individuals in need to obtain necessary resources in the midst of the pandemic.

To provide immediate support to nonprofits addressing the most essential community needs related to the pandemic



COVID-19 Economic Relief Fund

United Way of the Mid-South's COVID-19 Economic Relief Fund was designed specifically to support nonprofit agencies as they performed their critical services for individuals and families. This Fund helped to meet the needs of the region's health and human service organizations which experienced a surge in demand for support from neighbors and communities significantly impacted by this pandemic.

To provide long-term recovery support to United Way partner agencies in their continued and even more vital work

\$502,000

Corporations



\$275,000

Individual Donors

\$777,000 Total

in donations received through the COVID-19 Economic Relief Fund

COVID-19 Fund Corporate Donors

Wells Fargo MLGW TVA Deloitte
Regions **Truist Foundation** Valero
United Way Worldwide Ernst & Young Belz Comcast
Citrix Buckman Paragon Bank

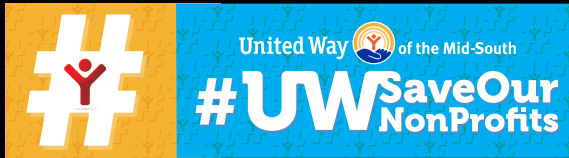
\$653,000 Total Grants

made to community agencies providing emergency relief or ongoing recovery support. Grants went to agencies providing essential and critical services on the front lines during the early, urgent phase of the pandemic. *Thanks to the many agencies that quickly responded to help our most vulnerable neighbors including:* Mid-South Food Bank | American Red Cross of the Mid-South | Neighborhood Christian Center | Boys & Girls Clubs of Greater Memphis | YMCA of Memphis and the Mid-South | Alliance Healthcare Services | Porter-Leath | Knowledge Quest | Catholic Charities of West Tennessee | Memphis Urban League, Inc. | Hope House | Thistle and Bee Enterprises Inc | Good Shepherd Pharmacy | Freeman Outreach Center | Alpha Omega Veterans Services | SchoolSeed-Memphis



Keller Williams | Mid-South Food Bank food drive
May 14, 2020 | \$7,000 raised & 2 pallets of food collected





During the COVID-19 pandemic, **#UWsaveournonprofits** allowed United Way of the Mid-South to unite citizens in their good works to support our community. Mid-Southerners virtually connected via United Way's social media channels; to both lift up our neighbors most impacted by the pandemic and also the innovative efforts created by United Way to serve them - including our COVID-19 Economic Relief Fund and our Relief Call Center powered by *Driving The Dream*.



Mid-Southerners came together to be part of the solution to save our area nonprofits - connecting individuals and families to services, and providing dollars to partner agencies that perform critical services. By activating United Way's **#UWsaveournonprofits** campaign, community supporters provided immediate assistance to nonprofits addressing the most critical community needs related to the pandemic.

To provide pivotal and timely support for our adaptive response efforts to meet the ongoing influx of need in our community

**1 DONOR GAVE
386 FAMILIES RECEIVED
\$100 KROGER GIFT CARDS
\$38,600 VALUE**



An additional, innovative component of our immediate responsiveness to individuals and families impacted by COVID-19 was United Way of the Mid-South's Relief Call Center powered by *Driving The Dream* - implemented urgently to connect callers to partner agencies and employment resources. United Way's Relief Call Center powered by *Driving The Dream* put callers in contact with multiple agencies without individuals having to repeat the circumstances for the call. In this unprecedented time, our United Way felt compelled to support the general public by actually helping to connect callers to essential services, and by providing follow-up to ensure those connections were made.



MLGW | *Mid-South Food Bank food distribution June 4, 2020 | 300 families served*

When United Way's Free Tax Prep program complied with public health guidance and closed our 24 in-person, face-to-face tax preparation sites, we implemented a creative, low-risk alternative - a Drive-Thru Drop-Off solution. Individuals and families who qualify for Free Tax Prep - with incomes less than \$56,000 in 2019 - filed their taxes using the Drive-Thru Drop-Off operation at the United Way Plaza, operated by United Way staff and dedicated volunteers. Against great operational headwinds created by the pandemic, Free Tax Prep served 10,037 tax filers this year, resulting in \$13.9 million in refunds. The innovative Drive-Thru Drop-Off program, alone, served 2,644 individuals, resulting in \$1.9 million in refunds!



United Way of the Mid-South offered many ways for our community to support their most vulnerable neighbors during the pandemic, and through the COVIDRELIEF text-to-give opportunity, over \$7,000 was raised to support our nonprofits and the individuals and families they serve.





UNITED WAY OF THE MID-SOUTH

DRIVING THE DREAM

Our United Way envisions a Mid-South in which all people have equitable access to resources and supports needed to achieve their hopes and dreams by fostering a community where the people we serve are hopeful, resilient and self-sufficient. **Driving The Dream** is our United Way's solution to the systemic challenge of generational poverty. It is a network of coordinated, effective nonprofit social services agencies that connects low-income families to the services and resources they need in the areas of health and well-being, social capital, economic stability and education.

Driving The Dream promotes a multi-generational approach to advancing a family's self-sufficiency. Together with our partners, we are able to work with the families to solve problems, access new resources, and sharpen existing skills. We are updating the way our programs work, so that the ways we build capacity for adults are connected to supports for children. Our collective goal is to help families move out of poverty towards a future of their choosing.

"UNITED WAY OF THE MID-SOUTH'S CARE COORDINATION HUBS, MANAGED BY LOCAL UNITED WAY PARTNERS, SUPPORT PARTICIPANTS IN CRISIS BY HELPING THEM BECOME ECONOMICALLY AND SOCIALLY MOBILE. WHETHER PARTICIPANTS REQUIRE ASSISTANCE MOVING FROM UNSAFE LIVING SITUATIONS OR HELP LOCATING SUFFICIENT HOUSING AND EMPLOYMENT, THE CARE COORDINATION HUBS PROVIDE WAYS TO BUILD CAPACITY SO THOSE IN NEED CAN MOVE FROM WHERE THEY ARE TO WHERE THEY DREAM TO BE."

~ Care Coordinator Hub Director

In order to provide equitable access to services, United Way of the Mid-South determined that a better service delivery system was a must; one that addresses not only the quality of direct services, but also seeks to improve accessibility, accountability and coordination among professionals and agencies in this service delivery. Thanks to a generous grant from First Horizon Foundation, this connectivity is made possible through an innovative partnership between our United Way and CaseWorthy. As a result, **Driving The Dream** partner agencies can now connect their families through the cloud to more than 185 community programs. That investment in the data platform for **Driving The Dream** network of partner agencies will allow United Way to provide the needed functionality to sustain growth of the network for the foreseeable future.

This functionality was put to the test during the COVID-19 pandemic, and beginning April 1, made a significant difference in the lives of the 259 individuals and families who made requests for assistance with shelter/housing, income, food and nutrition, employment, and healthcare.

5,000

CONNECTIONS TO AGENCIES

DRIVING THE DREAM IS ABLE TO MAKE AN ADDITIONAL 5,000 CONNECTIONS TO AGENCIES IN OUR NETWORK AS A RESULT OF THE INCREASED USER BASE THROUGH CASEWORTHY.

CaseWorthy [kays • wur-thee]

noun is a platform used by human service organizations to achieve greater efficiency in the work they do every day so they can serve more people in less time.

By migrating agencies to this new database, our **Driving The Dream** partners receive a much-improved user experience as well as the ability to collect richer and more actionable data from the network.

CATHOLIC CHARITIES, A DRIVING THE DREAM CARE COORDINATION HUB, HAS A DIVERSE GROUP OF SERVICES; SOME THAT ADDRESS IMMEDIATE NEEDS AND OTHERS THAT ARE GEARED TOWARD LONG-TERM SELF-SUFFICIENCY. DRIVING THE DREAM IS MORE THAN A 'PROGRAM,' IT IS A PARTNERSHIP WITH THE CLIENT. TOGETHER, WE MAP OUT STEPS TOWARD A FUTURE THAT OFFERS A BETTER QUALITY OF LIFE FOR THEIR FAMILY."

~ Kelley Henderson, Executive Director, Catholic Charities



Entered Year 3 (of 3)
\$3.23 MILLION GRANT



RECEIVED \$208,000
Year 2 (of a 3-year \$624,000) grant



IMPLEMENTED \$75,000
Regions workforce development-related grant



RECEIVED \$25,000 Anthem Foundation



\$10,000 BlueCare pilot grant

DTD WORKS WITH 73 ORGANIZATIONS PROVIDING 185 DIFFERENT SERVICES.

3,412 TOTAL REFERRALS

2,447 HOUSEHOLDS SERVED

5,014 CLIENT ENGAGEMENTS

DTD IS TOUCHING THOUSANDS OF MEMPHIANS AND TRANSFORMING LIVES.

58.5% HAD MORE STABLE EMPLOYMENT

80% HAD BETTER FINANCIAL MANAGEMENT STRATEGIES

80.9% REPORTED HIGHER INCOME

2,314 adults

received job readiness, training services and other supports to become employed.

MEET ANDREW

Andrew re-entered society in December 2019 from a prior offense, and he needed some additional support to become economically and socially mobile. Andrew lacked previous employment and the life skills necessary to become self-sufficient. He was referred to United Way of the Mid-South's *Driving The Dream* initiative, and with the help of his Care Coordinator, is gainfully employed, working full-time.

Another area where Andrew needed support was housing, which was uncertain before he became part of *Driving The Dream*. Now, with his employment and his bachelor's degree in Business, his adopted parents have welcomed him into their home, and he feels optimistic about his future. *Driving The Dream*, coupled with Andrew's determination to lead a better life, allows him to focus on moving from where he is to where he dreams to be.



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

COMMUNITY IMPACT FUND



United Way of the Mid-South has been a true partner to local nonprofits since the beginning, initially raising \$450,000 to support social services agencies in 1923, to now raising more than \$800 million cumulatively to make a meaningful difference for our most vulnerable neighbors. Traditionally, Community Impact Fund grants are United Way's largest and most familiar community investments; and in the midst of the pandemic, these grants continue to support critical programs of essential nonprofit agencies. During this time, we have become increasingly laser-focused in our areas of Community Impact Fund grant-making. We have moved from a broader base of support to aligning all investments with the following categories--childhood success, youth success, economic mobility, and access to health--amplifying the dollars given by donors into real outcomes in the community.

CHILDHOOD SUCCESS

Children from birth to eight years old enter school ready and are successful in primary school.

CHILDREN READING AT GRADE LEVEL	CHILDREN ENROLLED IN HIGH-QUALITY EARLY CHILDHOOD PROGRAMS	CHILDREN MAINTAINED OR IMPROVED SCHOOL ATTENDANCE

YOUTH SUCCESS

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

YOUTH TRANSITIONED FROM MIDDLE TO HIGH SCHOOL ON TIME	YOUTH GRADUATED HIGH SCHOOL ON TIME	YOUTH RECEIVED JOB-TRAINING SKILLS

ECONOMIC MOBILITY

Individuals/Families improve their socioeconomic status.

INDIVIDUALS ACCESSED AFFORDABLE HOUSING, FINANCIAL PRODUCTS & SERVICES	INDIVIDUALS INCREASED DISPOSABLE INCOME BY ACCESSING BENEFITS AND/OR REDUCING COSTS	INDIVIDUALS GAINED EMPLOYMENT AND/OR INCREASED THEIR WAGES

ACCESS TO HEALTH

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

INDIVIDUALS PARTICIPATED IN PHYSICAL ACTIVITY AND/OR HEALTHY FOOD ACCESS/ NUTRITION PROGRAMS	CHILDREN/ADULTS AVOIDED, REDUCED OR RECOVERED FROM HEALTH RISKS	INDIVIDUALS ACCESSED HEALTHCARE SERVICES AND SUPPORT

In our continued quest to support economic advancement and opportunity for all, we are uniquely positioned to rally support for local nonprofit agencies struggling to maintain the same level of services during the pandemic. Because of our understanding of local needs, United Way of the Mid-South leveraged our resources to address both the immediate needs and the long-term goals for these agencies. We were able to quickly mobilize funds and innovate our delivery systems to provide effective responses.

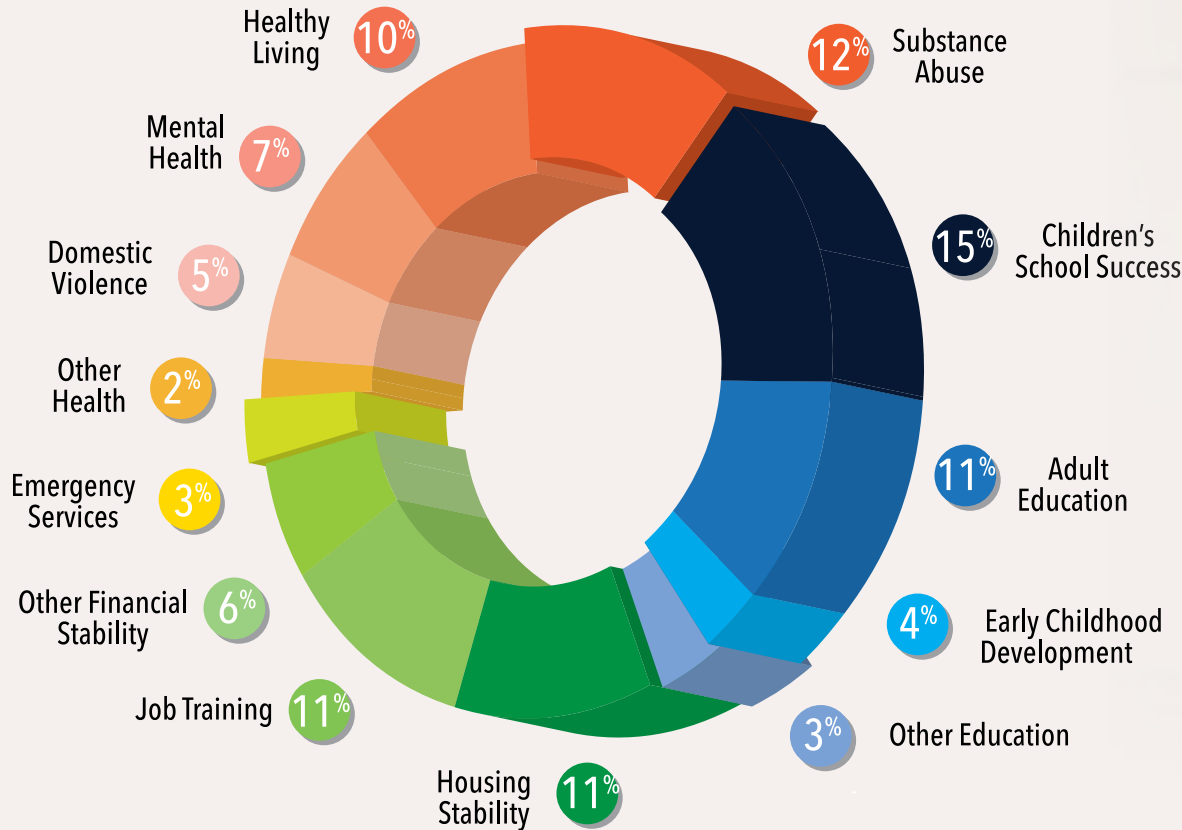
Economic disparity and generational poverty in the Mid-South remain key obstacles for individuals and families as they advance from poverty to prosperity. Our investments promote economic justice and demonstrate our commitment to supporting our neighbors in need.



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

CURRENT COMMUNITY IMPACT FUND INVESTMENTS

United Way of the Mid-South provides financial support to diverse programs working in concert to decrease poverty in the Mid-South.



MEET CLARA

Clara spent most of her career working in Memphis hospitals and was involved in United Way workplace campaigns. Being able to tour some of United Way's partner agencies gave her a first-hand look at the impact of donations.

Upon retirement in 2013, Clara was connected to United Way partner agency, Meritan, Inc., through a social security agency in Washington D.C.

When she arrived, she was taught how to use an iPad, and her first role was teaching peer-to-peer classes to help senior citizens learn how to use cell phones, computers and even iPads.

Clara credits Meritan with keeping her active and letting her know there is still something for senior citizens to do.

"SOMETIMES SENIORS DON'T KNOW SOMETHING AND ARE TOO ASHAMED TO ADMIT IT. MERITAN SPENDS TIME WITH SENIORS TEACHING THEM ABOUT THIS 'NEW WORLD'."

COMMUNITY PARTNERSHIP GRANTS



Scan to view our [Community Impact Agencies.](#)

YEAR IN REVIEW EVENTS



LIVE UNITED NITE OUT
LEVITT SHELL | JULY 21, 2019

United Way of the Mid-South closed out our celebration of 95 years of community impact at Live United Nite Out! Staff and event attendees alike brought their lawn chairs and their dancing shoes to enjoy music from Devon Gilfillian as well as food and beverages from local food trucks.



TOCQUEVILLE SOCIETY RECEPTION HONORING BRYAN JORDAN
FIRST HORIZON BANK | NOVEMBER 6, 2019

United Way of the Mid-South's Tocqueville Society Reception annually recognizes a dedicated donor and his or her impact upon our mission. In 2019, the Tocqueville Society was delighted to recognize Bryan Jordan for his loyalty to United Way and his influence within First Horizon Bank to bring additional donors to a better understanding of United Way's investment in our community.



WOMEN UNITED DOMESTIC VIOLENCE SUPPLY DRIVE

OLD DOMINICK DISTILLERY | SEPTEMBER 5, 2019

Women United kicked off Days of Caring by hosting a service project at Old Dominick Distillery. Sixty-seven volunteers sorted and packed necessity items that were then donated to women and children living in a domestic violence shelter. The economic value of the donated items was \$8,000.

MESSAGE FROM WOMEN UNITED [HERE](#)





ANNUAL BUSINESS MEETING

JANUARY 21, 2020 | BAPTIST MEMORIAL HOSPITAL

United Way's first Annual Business Meeting offered corporate partners, nonprofit agencies, donors and volunteers the opportunity to hear past accomplishments and learn more about ways to get involved in our community.



BEST OF THE BEST AWARDS

VIRTUAL EVENT | JUNE 18, 2020

This year's Best of the Best Awards looked a little different since it was United Way's first virtual event during the COVID-19 pandemic, but it was still a wonderful chance to celebrate the collective efforts of our workplace campaign partners. Best of the Best Awards highlight companies for their outstanding participation in United Way's campaign and throughout the year. Winners included Atmos Energy, Bank of America, Belz Enterprises, FedEx, First Horizon Bank, International Paper, Memphis Light, Gas & Water, Peabody Hotel, Principle Toyota, Regions Bank, The University of Memphis, Trustmark Bank, University of Tennessee Health Science Center and Valero.

VIEW AWARDS PROGRAM [HERE](#)



COMMUNITY CONNECTIONS

United Way ensures Mid-Southerners are able to connect their passions to service. Throughout the year, a variety of opportunities are available to support the needs of our neighbors.



STUFF THE BUS SCHOOL SUPPLY DRIVE JULY 1-31, 2019

School supplies and generous monetary donations were collected for Shelby County Schools Teacher Toolbox and Community in Schools of Memphis. Thirty-six companies participated in the collection drive and 200 volunteers sorted the items. The donated items generated an economic impact of more than \$62,000.



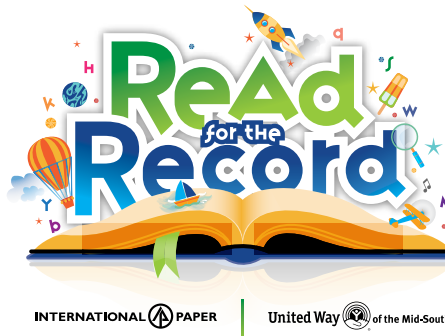
DAYS OF CARING SEPTEMBER 5-6, 2019

Days of Caring is the community's largest volunteer-driven service opportunity and the most impactful days of the year! Over 1,600 volunteers served more than 6,000 hours of their time to generate an overall economic impact of \$153,470.



TRUNK OR TREAT OCTOBER 26, 2019

Our Trunk or Treat festival featured fun STEAM activities, crafts and lots of candy! To recognize the Lights On After School initiative, we partnered with Mighty Lights to illuminate the Hernando DeSoto bridge in blue and yellow lights. Despite the rainy weather, 27 organizations and nearly 80 volunteers served 960 meals. Thanks to our donors, who contributed not only funds but also in-kind gifts, logging an economic impact of over \$18,000.



READ FOR THE RECORD NOVEMBER 7, 2019

Over 70 volunteers read to children at Porter-Leath Head Start locations for the nation-wide Read for the Record day. Thanks to the generous support of International Paper, every child received a free copy of the book "Thank You, Omu!"



BOUNTIFUL BASKETS DECEMBER 19, 2019

Volunteers joined Labor Union partners in sorting and packing donated food items. This annual project provided more than 200 food boxes to food insecure families in the community.



READ AROUND THE CHRISTMAS TREE DECEMBER 12, 2019

United Way of the Mid-South assisted in recruiting volunteer readers for Shelby County Schools Read Around the Christmas Tree event. More than 100 United Way corporate volunteers joined 1,500 other volunteers to read books to early learners.



In 2020, COVID-19 may have canceled in-person events, but United Way, our corporate partners, nonprofits and agencies still found ways to make a big impact on individuals and families suffering during the pandemic.



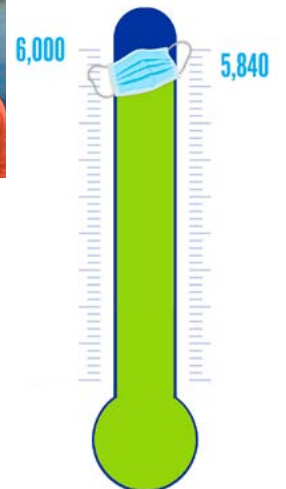
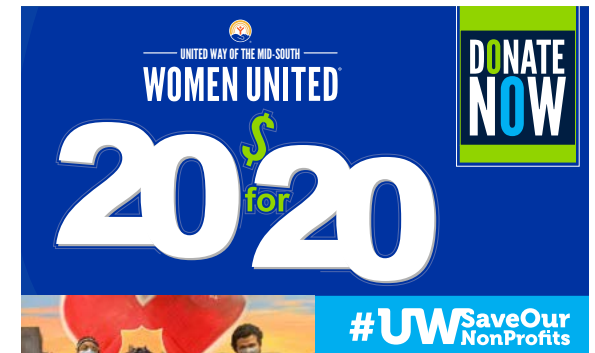
Valero | Mid-South Food Bank food distribution
 May 8, May 22, May 29, June 5 | 1,050 families served



When the COVID-19 pandemic shut down Mid-South schools, many students without devices were unable to continue their schoolwork and remain academically competitive. United Way and Valero partnered together to provide 200 age-appropriate tablets and laptops for Knowledge Quest students as well as funds from the Tennessee Afterschool Network to support Knowledge Quest's desire for virtual services for its students.

“IN A SURVEY TO OUR FAMILIES, WE LEARNED THAT THE MAJORITY OF OUR KNOWLEDGE QUEST STUDENTS DIDN'T HAVE ACCESS TO A DEVICE TO EXTEND THEIR LEARNING WHILE THEY SHELTERED IN PLACE. OUR PARTNERSHIP WITH VALERO ENABLED US TO PROVIDE QUALITY LEARNING FOR OUR STUDENTS THAT WAS AGE APPROPRIATE THROUGH VIRTUAL FIELD TRIPS, STEM CURRICULUM, FITNESS OPPORTUNITIES INCLUDING MEDITATION AND YOGA, ACT PREP FOR OUR HIGH SCHOOL STUDENTS AS WELL AS FUN ACTIVITIES FOR THE WHOLE FAMILY.”

~ Marlon Foster, Executive Director, Knowledge Quest



As part of #UWSaveOurNonProfits campaign, United Way encouraged Mid-Southerners to come together to donate masks to the Salvation Army Purdue Center of Hope. Our community responded by donating 5,840 masks.

FUELING THE CAUSE

United Way of the Mid-South is the largest public charitable foundation in the Mid-South and a convener of funders, fighters and followers. We serve at the intersection of corporations, nonprofits, individual donors and volunteers; and with their generous support, we are able to fulfill our mission of improving the lives of individuals and families in the Mid-South.

United Way's agency grant-making is totally dependent on the generous donations of individual and corporate partners – our "funders." We invest 83 cents of every dollar given to our **Community Impact Fund** to boost economic opportunity for all in our community and fuel the fight against poverty. Members of Leaders United, donors who give \$500 or more, and the Tocqueville Society, donors who give \$10,000 or more, make up nearly 5,500 of United Way's 23,000 donors. These generous donors ensure that the work of United Way is fully supported.

United Way also supports the "fighters" – over 70 high-performing, human services agencies – through our **Community Impact Fund**. United Way offers corporations and donors the ability to create social change, to have measurable impact upon the lives of individuals and families, and to transform the economic trajectory of our community through their financial contributions.

Finally, United Way invests in our "followers" – loyal volunteers who use their gifts and talents to make lasting change for individuals and families in the Mid-South. United Way volunteers share a powerful sense of belonging to our community and strive to enhance, through a variety of hands-on and virtual volunteering opportunities, a person's experience for the better.

Last year, support for United Way of the Mid-South from 23,000 donors and 128 corporate partners made a meaningful impact on the lives of individuals more than 300,000 times throughout our eight-county region. We continue to strive to be a mobilizer of community resources – human,

financial, and social – the convener of a collaborative network of partners, and a leading catalyst in progressively transforming the lives of individuals and families in the Mid-South.

CORPORATE CAMPAIGNS

The backbone of United Way's funding for the Community Impact Fund is formed by the many corporations in the Mid-South that want to connect with an organization that ensures their corporate dollars are used to do the most good, and that activates their employees more deeply in their communities. All of the donations, whether from workplace campaigns or corporate gifts, combine to make it possible to implement impactful change; both for our community, and also for those seeking to move from poverty to a life of economic advancement and opportunity.

Every year, thousands of Mid-South employees get involved in workplace giving campaigns which unite employees in all offices or branches of a company, and offers them an opportunity to give, advocate, volunteer and engage with causes that personally matter. Companies are working harder than ever to combat poverty in our community. These workplace campaigns encourage employees to donate to United Way – to make a critical and invaluable investment in our community.



J.T. YOUNG

President and CEO, Memphis, Light, Gas & Water
United Way of the Mid-South 2019-20 Campaign Chair

"MEMPHIS LIGHT, GAS & WATER IS PROUD TO BE A SUPPORTER OF UNITED WAY OF THE MID-SOUTH FOR OVER 20 YEARS. IT IS AN HONOR TO BE A PART OF THE WORK THEY ARE DOING TO HELP INDIVIDUALS AND FAMILIES ADVANCE FROM POVERTY TO PROSPERITY. AS THE 2019-20 GENERAL CAMPAIGN CHAIR, IT HAS BEEN MY PRIVILEGE TO PARTNER WITH THE MANY CORPORATIONS AND EMPLOYEES WHO CHOOSE TO MAKE UNITED WAY THEIR CHARITY OF CHOICE."





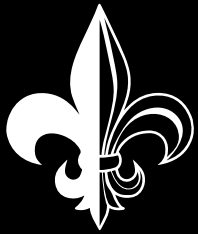
Workplace campaigns are recognized through our annual Best of the Best Awards. These corporate partners allow our United Way to drive the dreams of those in poverty in the Mid-South. Their support enabled United Way to have a great year raising funds for the Community Impact Fund and our partner agencies.

CORPORATE GIVING RECOGNITION

United Way of the Mid-South recognized **FedEx** as our Best Corporate Champion, the company that contributed the largest corporate gift. We also awarded Best Difference Maker to **International Paper** for their year-round volunteer engagement, and the Best Game Changer award to **First Horizon Bank** because they had the highest percentage of Tocqueville Society donors, who give \$10,000 or more. Best Team Effort was given to **Valero** based on their company having the highest percent participation, calculated by the number of donors compared to their total number of employees. Finally, celebrated for their campaign successes as determined by other criteria, the following corporations also received our coveted awards for being among this year's Best of the Best: Atmos Energy, Bank of America, Belz Enterprises, Memphis Light, Gas & Water, Peabody Hotel, Principle Toyota, Regions Bank, The University of Memphis, Trustmark Bank, and University of Tennessee Health Science Center.

Thanks to these corporate partners, and over 120 other institutions, that believe in the work of United Way and provide occasions for their employees to help Mid-Southerners achieve economic opportunity.





— UNITED WAY OF THE MID-SOUTH —
**TOCQUEVILLE
SOCIETY**

United Way of the Mid-South's Tocqueville Society was founded in 1984 when 17 local philanthropists decided to support the organization at the highest level with personal contributions of \$10,000 or more. Today, Tocqueville Society donors continue to elevate our work and focus their giving on helping individuals and families achieve economic self-sufficiency.

“THOUGH TALENT AND EXPERIENCE ARE UNDOUBTEDLY ESSENTIAL IN LEADERSHIP, I BELIEVE THAT GREAT RESULTS ARE THE FRUIT OF PASSION AND MOTIVATION, NO MATTER THE TASK. AS THE PAST CHAIR OF FIRST HORIZON’S UNITED WAY CAMPAIGN, MY PASSION FOR THE MEMPHIS COMMUNITY WAS THE DRIVING FORCE BEHIND MY STRATEGIZING EFFORTS. AS SOMEONE WHO GREW UP IN ONE OF MEMPHIS’S MOST VULNERABLE ZIP CODES, I SAW THE CAMPAIGN AS AN OPPORTUNITY TO REINVEST IN THE LIVES OF OTHERS WHO ARE IN NEED OF HELP THAT CAN TRANSFORM THEIR LIVES. AS A RESULT, MY CAMPAIGN CABINET FORMED A STRATEGY, PRIMARILY FOCUSING ON INCREASING HIGH-LEVEL DONOR INVOLVEMENT AT THE TOCQUEVILLE SOCIETY LEVEL. IN THIS EFFORT, WE WERE ABLE TO EDUCATE AND COMMUNICATE THE MISSION OF UNITED WAY AND TARGET POTENTIAL NEW DONORS AT HIGHER GIVING LEVELS. AS A RESULT, THIS LED TO INCREASED PARTICIPATION AND A SUCCESSFUL CAMPAIGN. DURING THIS TIME, I CHALLENGED MYSELF AND INCREASED MY ANNUAL GIVING AND BECAME A TOCQUEVILLE DONOR AS WELL.”



TANYA HART

SVP, Total Rewards at First Horizon Bank
Former First Horizon United Way
Chairperson

2019-2020 TOCQUEVILLE SOCIETY MEMBERSHIP

(\$100,000 to \$249,000)

The Belz Family Foundation
Tocqueville Society Member prefers to remain anonymous.

(\$75,000 to \$99,999)

Henry W. Morgan
 Frederick W. Smith

(\$50,000 to \$74,999)

Anne Wulff and Brian Bendersky
 Hilliard and Harriett Crews
 Eric C. Fountain
 R. Davis Howe and Amy C. Howe
 D. Bryan Jordan (Kim & Bryan Jordan)
 Robert McEniry
 John Smith
 Nancy Walker

(\$35,000 to \$49,999)

Charles Gerber
 Gavin M. Murrey
 William R. Reed, Jr.

(\$30,000 to \$34,999)

The Scheidt and Hohenberg Foundation

(\$25,000 to \$29,999)

Markova and Chris Anderson
 Dan Case
 Gregory Duckett
 Joel Goldblatt
 Alan Graf
 Hyde Family Foundation
 Carol W. Prentiss
 Ray and Erin Schultz
Tocqueville Society Member prefers to remain anonymous.

(\$20,000 to \$24,999)

David Haddad
 Max B. Ostner, Sr. Charitable Trust
Tocqueville Society Member prefers to remain anonymous.

(\$15,000 to \$19,999)

Mike and Kim Anderson
 Kathryn and Carl Asmus
 Vince DeGutis
 Scott and Nada Fountain
 Kathy and J. W. Gibson
 Molly and Robert Gooch, III
 Elise Jordan
 Charles Maxwell
 Catherine and Tim Nicholls
 Tom and Lisa Plath
 The Salmon Foundation
 Monica Skipper
 Susan L. Springfield
 Michael and Rebecca Ugwueke
 Anne and Mike Waddell
Tocqueville Society Member prefers to remain anonymous.

(\$10,000 to \$14,999)

Scottt Adams
 Jane and Ben Amaba
 R. Scott Barber
 Joseph Barkley
 Christine Belling*
 Jerry C. Beyl*
 Richard K. Bollinger, Jr.
 Clarence Braswell*
 Shannon A. Brown
 Justin Brownlee*
 Alice and Phil Burnett
 Preston Carpenter
 Mr. and Mrs. John C. Carson, Jr.
 Dale Chrystie*
 Marshall A. Clark
 Derek Clenin
 Tom and Jana Cleves
 Jay Cofield
 Melanie Compton*
 John M. Daniel
 Dr. Paul DePriest
 Caprice O. Devereux
 Don Dillman

Jason and Linda Dombroski
 John Dunavant
 Mike and Carolyn Edwards
 Michelle Epps*
 Fredrika and Joel Felt
 Dave and Bobbie Ferraro
 Patrick Fitzgerald*
 Russ, Molly and Tom Fleming
 Bob and Tina Fockler
 Alan and Vail Gates
 Greg Gibson
 Jeffery Greer
 Everett P. Hailey
 Betty Hale
 Gregory Hall
 Amanda and Scott Harkins
 Rheagan and Philip Harris
 Tanya Hart*
 John Hartney
 Peter Heist
 Wil J. and Sally Hergenrader*
 Paul Herron
 Jason Honeycutt
 Russell Hosea
 Jerry Hubbard
 Ben Huwer
 Frank and Dr. Jeanne Jemison
 Rebecca Jones*
 Maria Justo
 Eric Keane
 Michael E. Kisber
 E. Carl Krausnick, Jr.
 Gopal Krishnamurthi*
 Ben Landess
 Mike Lauderdale
 William Joseph Lee*
 Michael Lenz*
 Henry and Carol Levy
 David Liebetreu
 Jason Little
 Darlene Linton
 Ira Lipman
 Carla and Bruce Livesay

William Losch
 Jeff Maddock
 Tammy Mailhot*
 Judy and Mickey McLellan
 Karen and Mark McGough*
 Neil Gibson and Lisa Menuskin
 John Merino
 Eric Miller
 Jonathan Moorehead*
 Allen Morgan, Jr.
 Dr. G. Scott Morris
 Charles E. Murphey, Jr.,
 Kathryn and Henry J. Naifeh, Jr.
 Scott Newberry
 Richard S. Norman
 Anthony Norris
 Jerry Owen*
 Tony Parker*
 Marianne Parrs
 John Perkins*
 Jeffrey Peterson*
 John Pettey, III
 Scott Plunkett
 David T. Popwell
 James Prentiss
 Susan and Bob Quinn
 Lindsey and Kevin Rea
 Isabelle & Jean-Michel Ribieras
 Richard Roberts
 Terry Robertson*
 Maisha Robinson
 Revs. Kenneth and Marilyn Robinson
 Nuriya Robinson-Anozie
 Claude Russ
 Dave Russell
 Bathsheba Sams
 Joe Schiffhouer*
 David Schlitt
 Tracci Schultz
 J. T. Shawkey
 Amy Shreve*
 Rajesh and Shivani Singh
 Ratan Singh

Catherine Slater
 Dave Smith
 Jack Soden
 Vernon Stafford, Jr.
 Candace Steele-Flippin*
 Melvin and Gia Stokes
 Randy Stokx
 Matthew Stone
 Elmer W. Stout
 Rajesh Subramaniam
 Calvin Sullivan*
 Mark and Laurie Sutton
 Susan Sweat
 Chris and Stefanie Taylor
 Joseph T. Tobin
 Joshua Tulino
 Rodney L. Turner
 Steve and Fran Twersky
 Bonnie C. Voldeng
 Joseph C. Weller
 Bobbi Wells
 Tom Wicinski*
 Jeffrey Willis
 Chris and Rich Wilson
 Richard Wright
 Mark and Robbie Yerger
 Jarl Young
Tocqueville Society Members prefer to remain anonymous.

* Part of The Tocqueville Society's
 "Step-Up" program

FINANCIAL REPORT

STATEMENT OF ACTIVITIES

JULY 1, 2019 – JUNE 30, 2020

REVENUE	2020	2019
ANNUAL CAMPAIGN		
Contributions received	\$16,104,298	\$16,763,315
Less donor designations	-\$4,114,691	-\$4,730,590
Less provisions for noncollectable pledges	-\$933,400	-\$865,305
	\$11,056,207	\$11,167,420
Investment income	-\$251,743	\$193,604
Special events	–	\$147,526
Change in trust	-\$10,716	-\$1,794
Other contributions	\$478,215	\$368,511
Grants and contracts	\$2,269,437	\$1,292,562
Miscellaneous income	\$22,043	\$17,425
TOTAL REVENUE	\$13,563,443	\$13,185,254

EXPENSES	2020	2019
PROGRAM SERVICES		
Allocations to agencies	\$11,754,310	\$12,873,770
Less donor designations	-\$4,114,691	-\$4,730,590
NET FUNDS DISTRIBUTED	\$7,639,619	\$8,143,180
Community service	\$2,973,059	\$2,939,668
Grant expenses	\$1,784,290	\$1,218,126
TOTAL PROGRAM SERVICES	\$12,396,968	\$12,300,974
SUPPORTING SERVICES		
Fundraising	\$757,932	\$1,015,671
Management and general	\$1,604,787	\$1,582,413
TOTAL SUPPORTING SERVICES	\$2,362,719	\$2,598,084
TOTAL EXPENSES	\$14,759,687	\$14,899,058

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.





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of the Mid-South

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