

REV. KENNETH S. ROBINSON, M.D. President & CEO, United Way of the Mid-South 2023 Annual Report | 2

LETTER FROM THE PRESIDENT & CEO

UNITED WAY OF THE MID-SOUTH
CELEBRATED 100 YEARS OF SERVICE IN 2023!

In 1923, a small group of nonprofits and community leaders formed the Memphis Community Fund - a system of collective fundraising that supported twenty-one local charities. As we look back over 100 years of service to the Mid-South, we see that what started out as a novel idea for charities to place competition aside and to raise funds collectively, continues to be a transformative way to create community impact.

Today's United Way of the Mid-South has definitely grown and evolved over the past 100 years. But what was true then, is still true today - we can do more together than we can do alone. You will see in the pages of this annual report that your United Way is both embracing, building upon and enhancing our *traditional* fundraising and grantmaking model, to also create *transformational* change in the lives of individuals, families, and our entire community!

At United Way of the Mid-South, we recognize that the <u>one</u> issue that has the greatest impact on too many families - adults and children - and also has the greatest impact on our community, is poverty. Given our historical relationships as a trusted partner with community nonprofits, we have set out to address this critical issue with a laser focus. Now with an \$18.2 million grant from the Tennessee Department of Human Services to expand our collaborative, accountable *Driving The DreamTM* network, scores of partner agencies will serve an additional 5700 families over the next two years! By working together with a singular focus, we are helping to create hopeful, resilient, and self-sufficient individuals, so that they may build a brighter future for their families. Yes, we are helping them "move from where they are, to where they <u>dream</u> to be!"

As we look forward to United Way of the Mid-South's second century of service, our programs and our investments in the community are more critical than ever before. The community needs us - and the high-performing agencies we fund through our grant programs need us - more than ever. Truly, we are in a better position today than we have ever been in the last century to have an enduring, transformational impact upon the lives of those who need this United Way. We could only have reached this milestone anniversary, and we're able to look to the future with optimism, because of <u>you</u>!

Stepping into United Way of the Mid-South's next century, I am grateful to have your support, your partnership, your advocacy, and your dedication to our mission. We know we are making a difference by working together - in a united way.

Thank you!

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LETTER FROM THE CHAIR OF THE BOARD OF DIRECTORS



Photo credit: Max Gersh/Commercial Appeal

This year, we were proud to look back at the accomplishments and growth of United Way of the Mid-South over the past 100 years. And now we are eager to move into our next chapter with a renewed sense of purpose.

The Board of Directors looks forward with a passion to expand the aligned grant-making that builds the capacity of our community nonprofits. We are pleased to announce the second year for our Equity Grants, funding eight grassroots organizations that are addressing poverty at the neighborhood level.

As we diversify our revenue streams, we look to expand and extend contract funding to keep the growth of **Driving The** $Dream^{TM}$ (DTD^{TM}) on track to impact thousands of families in our community. A funding agreement with Shelby County government will allow United Way to create a connection to County and DTD^{TM} services through interactive kiosks at public and private locations, such as community centers, libraries, and corporate workplaces.

The staff is building a strategy for the future that relies on innovative technology and capitalizes on integrated solutions for communications, fundraising, service delivery, and more. By leveraging our community connections, we will expand the reach of our message.

I'm proud of what United Way of the Mid-South is contributing to our community and the vital resource that it provides for individuals and families who are striving to break the cycle of poverty. I invite you to join us on our journey.

BOARD OF DIRECTORS

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.

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CHRIS ANDERSON Enterprise Holdings, Inc., Retired
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ERIC BROWN Valero Energy Corporation
REGGIE CRENSHAW Leadership Memphis
REBECCA CULLISON Methodist LeBonheur
JOHN DANIEL First Horizon, Retired
JON PAUL DAVIS HHM CPAs & Advisory Services
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MARY ANN JACKSON Baker, Donelson, Bearman, Caldwell & Berkowitz

MELANIE A. KELLER Meritan, Apelah & Generations, Inc. ROBERT C. KLESGES, PH.D. University of Virginia Medical School

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JEAN M. MORTON Truist Bank
NIQUALUS NIBLEY IBEW Local 474

JOHN PETTEY, III Raymond James
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ERIN PRYOR First Horizon
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 Way of the Mid-South **DRIVING THE DREAM**

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 5,700 families (14,000 adults and children) by the end of 2024 and positions United Way of the Mid-South as the innovative leader in collaborative human service delivery systems.

Driving The Dream™ is committed to breaking the cycle of generational poverty by taking a two-generation (2Gen) approach. *DTD*™ 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 prosperity from one generation to the next.

Working through a network of over 130 human service agencies, hospitals, schools, and faith-based organizations, **Driving The Dream**TM connects people with a network of services to help them move toward the life they dream of. With a shared data platform, **DTD**TM participants may enter our system of care and share their story and information only once. They are then 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 care, and each participant is treated with dignity and respect.

United Way of the Mid-South is mission-focused to help individuals living in poverty achieve social and financial mobility. 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^{TM} .

Through the Families First Community Grant, *Driving The Dream*™ is expanding the network to include twelve Care Coordination Hubs that provide case management for individuals and families in need of multiple services to address complex issues. The significant number of Referral Network Partners and Outreach & Education Partners further expands the capacity of **DTD**™ to serve families living in poverty and help them to create a future that is bright for themselves and their children.







TOP REQUESTS THROUGH THE DTD™ CALL CENTER



DTD™ is Transforming Lives

Following 4 to 6 months of DTD Care Coordination, participants served report:

47% 53% 67%

had more stable employment

had better financial management strategies reported higher income

SINCE ITS INCEPTION...

2018 through June 2023, *Driving The Dream*™

12.2K+

Referrals to Care Coordination Hubs and Referral Network Partners

14.2K+

Total Household Members Impacted by Driving The Dream™

12.5K

Call Center Requests

18.6K

Total Participant Interactions



BENEFIT KITCHEN

United Way launched **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. Any Tennessee resident can text **BENEFITS** to 211211 to use the Benefit Kitchen service.

BENEFITKITCHEN



SINGLECARE

United Way of the Mid-South distributes SingleCare® prescription drug cards to ease the cost burden of health care. In 2022-23 over 23.311 area residents used the SingleCare® cards, saving a total of \$2,315,508 on prescription medications.





PHARMACY SAVINGS CARD

AUTHORIZATION NUMBER 001297456

610378 GRP 218093

PCN SC1

UP TO 80% OFF YOUR PRESCRIPTIONS

This card is not insurance.

Customer Support: 1-844-234-3057



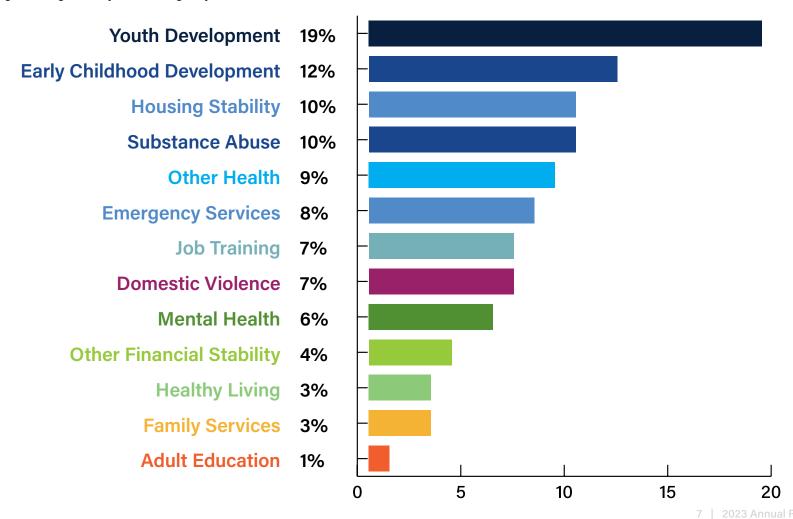
COMMUNITY IMPACT THROUGH GRANTMAKING

Community Impact is at the heart of United Way of the Mid-South's mission. By funding high-performing nonprofit agencies, United Way 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 every day to improve the lives of our neighbors. Funded agencies address issues such as child and youth development, job training, housing stability, and emergency services.

WHERE GRANT DOLLARS ARE INVESTED TO IMPACT POVERTY

During 2022-23, United Way of the Mid-South provided financial support, through a competitive grant application process, to **81** nonprofit agencies. Of the total **277,345** persons served in programs funded through Community Impact grants, a reported **94%** were from low-to-moderate income households.



COMMUNITY IMPACT

UNITED WAY SUPPORTS ECONOMIC MOBILITY

JOB READINESS

59%

of youth who received job skill training gained employment

4,038

adults received job readiness training to become employed

FINANCIAL STABILITY

people participated in programs designed to increase wages

71%

increased their financial stability through improved money management

people received services to increase housing stability

successfully maintained stable housing

Grant-funded agencies report the impact made possible through support from United Way of the Mid-South:

UNITED WAY SUPPORTS YOUTH DEVELOPMENT

YOUTH SUCCESS

42,137

Youth participated in success programs from education to career

of participants maintained or improved attendance

95%

of seniors served graduated on time

EARLY INTERVENTION

children at risk for developmental delays delay participated in early intervention

met appropriate milestones

83%

were proficient in readiness for kindergarten

UNITED WAY SUPPORTS HEALTHY LIFESTYLES, **CRISIS INTERVENTION AND RECOVERY SERVICES**

HEALTHY LIVING

8,568 93%

children and adults participated in programs to improve physical health

adopted improved behaviors for long-term healthy outcomes

IMPROVED MENTAL HEALTH

35,979

people accessed crisis intervention services for mental health

2,953 86%

people received counseling

showed evidence of improved mental health

EMERGENCY SERVICES

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

243,224

people received food or meals

9,239 2,134

people received clothing

people received financial assistance to overcome challenges due to disasters

EQUITY FUND

The **Equity Fund** supports grassroots organizations in Shelby County which are working to address inequities in economic development, public safety, housing, community leadership and health - all of 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 2022-2023 the Equity Fund invested in the following organizations:

- ALCY BALL COMMUNITY DEVELOPMENT CORPORATION
- FREEMAN OUTREACH
- RICHARDSON EDUCATION
- THE WAY COMMUNITY GROUP
- CARPENTER ART GARDEN
- MUSTARD SEED
- PROJECT TRANSFORMATION
- UNITED PARENTS & STUDENTS

EMERGENCY FOOD & SHELTER GRANTS

United Way of the Mid-South administers **Emergency Food & Shelter Grants** in Shelby County TN and Crittenden County AR for the Federal Emergency Management Agency. These grants do not cover disaster relief, but are intended to support people who need immediate, short-term help to avoid a financial crisis. In the 2022-23 fiscal year, **20** agencies received over **\$1,890,000** in funding to provide food, emergency shelter, and housing and utility assistance.





United Way of the Mid-South relies on the generous support of companies that deliver on their corporate social responsibility goals with workplace giving campaigns that fund the collective impact of United Way. Through investments in United Way's mission, our valued supporters and their employees donate generously through payroll deduction, corporate grants and sponsorships, and in-kind contributions.

Workplace giving campaigns and corporate support from **over 200** companies to fund United Way's Community Impact helped **over 277,000 people across the Mid-South who were served through 81 agencies**. United Way campaigns rely on the support of **Campaign Representatives** and **Employee Engagement Champions** who facilitate fun, engaging, and robust workplace campaigns and corporate volunteer activities.







Free Tax Prep celebrated 20 years of service to the Mid-South in 2023! 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 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 (EITC), 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.



Total Returns since 2003

\$200.8M

Federal Refunds since 2003

\$67.7M

EITC since 2003



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2.1.1

Get Connected, Get Help.™







COMMUNITY ENGAGEMENT

ECONOMIC IMPACT OF GOODS & SERVICES

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 with United Way includes volunteering time and talent to read to children, clean a community garden, build accessible entries, contribute to a collection drive for much-needed items for people in need, and so much more.

Volunteer United is the Mid-South's premier engagement portal. Nonprofits across the Mid-South, whether funded by United Way or not, may promote volunteer opportunities through this public platform. Individuals or groups may use the portal to sign-up to help. 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.

ENGAGEMENT IMPACT

9.4K

Total Volunteer Hours

\$601K

Economic Impact of Donated/In-Kind Goods & Service











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's Contributions Received only reflects and accounts for funds that are designated for UWMS.

Join us in our mission to help families move toward financial stability and selfsufficiency.

Text **UWMS** to **40403** or scan the code.



LIVING UNITED

STATEMENTS OF ACTIVITIES & CHANGES IN NET ASSETS

July 1, 2022 - June 30,2023

Revenue	2023	2022
Contributions Received	\$7,657,736	\$7,832,474
Less Agency Donor Designations	-\$495,322	-\$976,835
Less Uncollectible Pledges	-\$9,287	-\$504,052
Subtotal	\$7,153,127	^{\$} 6,351,587
Investment Income	\$1,003,215	-\$1,826,771
Change in Beneficial Interest in Trusts	\$10,324	-\$133,861
Grants/Contracts	\$2,542,589	\$1,791,080
PPP Loan Forgiveness	_	\$831,667
In Kind Donations	\$142,286	\$204,948
Misc. Income	\$1,950	\$4,025
Other	\$206,206	\$73,790
Total Revenue	^{\$} 11,059,697	^{\$} 7,296,465

Expenses	2023	2022
Program Services		
Community Impact Grants and Other Grants	\$4,197,888	\$4,610,744
Less Donor Designations	-\$495,322	-\$976,835
Total Community Impact Grants	\$3,702,566	\$3,633,909
Community Service	\$3,510,736	\$3,124,515
Grant Expenses	\$1,903,138	\$1,624,129
Supporting Services	\$2,071,946	\$2,281,711
Total Expenses	^{\$} 11,188,386	^{\$} 10,664,264
Net Increase (Decrease) in Net Assets	-\$128,689	-\$3,367,799
Net Assets, Beginning of Period	\$14,543,219	\$17,911,018
Net Assets, End of Period	\$14,414,530	\$14,543,219

