



United Way of the Midlands

ANNUAL REPORT

United
Way



TM

WE ARE COMMUNITY STRONG.

United Way of the Midlands
www.uwmidlands.org





BOLD FUTURE

Our Omaha-Bellevue-Council Bluffs community has much to celebrate. We have weathered the economic storm better than most. Our cities are rich with history, culture and good will.

United Way, though, sees something even better ahead.

A community that defeats the entrenched poverty that grips certain neighborhoods and robs its residents of hope. Threatens to exhaust public and charitable resources. Denies its children a better chance at a brighter future.

We envision a concerted effort to identify and target this poverty's specific root causes, and to marshal the resources necessary to make a measurable and lasting difference.

We know it's possible. You see, we've met the people and engaged the organizations that have the tools and the know-how. The compassion. It's your company. Your agency. Your school. Your family. It's you. It's all of us. It's the best efforts, brightest minds, and the strongest will. It's United Way.

It will take bold goals to get there. It won't happen overnight. But we begin now. And we invite you to join us.

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Guiding Principles

Our goals, processes and decisions are **transparent**.

We hold ourselves and others **accountable** for results.

We **partner** with nonprofit organizations and other stakeholders in the community to achieve results.

We seek to attract and harness the **full power of leaders and volunteers** to solve community problems.

Mission

United Way of the Midlands engages the passion and resources of our neighbors and community partners to improve people's lives. We help those who need it most and create positive change for generations to come.

SEVEN STRATEGIC INITIATIVES

- » We have a clear, new vision about our work.
- » Our guiding principles help us focus on quality solutions.
- » An engaged board and committees govern carefully, and well.
- » Investment of donor dollars is based on local community needs, solid data and a strategic plan for the future.
- » Strong partnerships with nonprofits, private and public entities yield better results.
- » We are ready to engage today's donors and their vision of positive community change.
- » We focus our efforts on our community's unique challenges.





Terry Kroeger
Board Chair



Karen Brickleyer
President and CEO

WE ARE **COMMUNITY STRONG.**

Dear Friends,

We often end letters with a heartfelt *thank you* before signing our names.

But let us **begin** with *thank you*. Thank you for your generous gifts to United Way of the Midlands. Thank you for your committed leadership. Thank you for your valuable time. Thank you for helping us to serve our community's most vulnerable people.

This annual report is a record of accomplishments. Your accomplishments. It is a testament to the hard work and dedication of every member of the United Way of the Midlands family — people who come together motivated by the desire to help others. The year closed with a new record in fundraising, a new team of leaders serving as the Board of Directors and stronger relationships with long-time partner agencies that provide much needed support to our community.

We are proud to support 133 programs through 32 partner agencies that are working every day to bridge the gap between our hopes and aspirations, and the *realities* for too many of our neighbors. We supported our partner agencies with the funds to provide 645,679 services to people across the metro area. These people — our friends, neighbors and family — will have a much better chance of realizing their potential because of United Way's support. We celebrate these successes and recognize the good we have achieved. Together, we have accomplished so much, but there is so much yet to be done. The shadow of poverty stretches across our entire community, and, despite our efforts, it has grown over the last decade.

The time is now for a concerted effort to reduce poverty and provide more opportunities for people to succeed. We are confident we can do just that. When we join together with goodwill in our hearts and a common purpose of improving lives and strengthening our community, we can — and will — create transformative change.

This year we will ask for input from our community, from Elkhorn to Bellevue to Council Bluffs and all points between. We invite you to join us in a dialog and a process centered on the greatest needs facing our community. This community needs assessment will gather information about residents' attitudes and opinions regarding precisely-defined issues, problems or opportunities, and determine community support for United Way's role in long-term human challenges.

We see what can be and what should be, because we are community based and we are community focused. We are United Way, and because of you, WE ARE **COMMUNITY STRONG.**



BOARD OF DIRECTORS

Terry Kroeger
Omaha World-Herald
Board Chair
2011-2013

Rodrigo Lopez
AmeriSphere Multifamily
Finance LLP
Incoming Board Chair
2013-2014

Michelle Stromp
KPMG LLP
Treasurer

Craig Martin
Lamson, Dugan
and *Murray, LLP*
Secretary

Sara Boyd
Omaha Community
Foundation

Andy Fletcher
Bailey Lauerman

Lance Fritz
Union Pacific Railroad

Michael Geary
Peter Kiewit Sons', Inc.

Kathleen Gerber
Community Volunteer

Steve Grandfield
Blue Cross Blue Shield
of Nebraska

Dr. Mary Hawkins
Bellevue University

Brian Keck
ConAgra Foods, Inc.

George Little
HDR, Inc.

Mary Lopez
Community Volunteer

Othello Meadows, III
Seventy-Five North
Revitalization Corp.

Jessica Pate
Community Volunteer

John P. Nelson
Silverstone Group
Ex Officio

Karen Bricklemeyer *President and CEO, United Way of the Midlands*



THE WORK

What motivates us is the opportunity to change our neighbors' lives for the better, and to help people help themselves. We work with nonprofits, companies, foundations, public agencies and many others to break the destructive and costly cycles of human need. Our ultimate goal is to help our community reach its full potential.

A Strong Safety Net

United Way and its nonprofit partners strengthened their relationships in 2012. That meant more candid discussions along with new opportunities to improve the process used to request funding and report results. The safety net of 133 critical health and human services helped our most vulnerable citizens become stronger and more independent.

New Collaborations - Groundbreaking Partnerships

With an eye on the future strength of the metropolitan area, United Way engaged with partners old and new on this question: Can we take the next step, streamline the human service process and reach even more of those in need? The result was \$700,000 in supplemental funding for collaborative projects that aim to prevent homelessness, increase access to urgent mental health services, child care for the working poor, and more. There are more than 40 organizations in all sharing these one-time United Way funds. The next steps are to measure their results and build on successes. United Way wants to go from "what is" to "what could be" with fewer people needing services in the future.

Community Needs and Community Engagement

One result of strategic planning in 2012: United Way's community investment review team has grown to 130 local citizens. These volunteers are getting to know the funded programs and partners well, a result of on-site visits and interviews. Measurable program results remain a focus of this transparent review process.

DONOR DOLLARS INVESTED (IN MILLIONS)

UWM Community Care Funding and Community Initiatives	\$10.7M
One-Time Supplemental Funding for Collaborative Projects	\$700K
Community Health Charities of Nebraska	\$1M
UWM Donor-Designated Funds	\$3.5M
CFC Donor-Designated Funds	\$1.2M
Total Donor Dollars Invested	\$17.1M

VOLUNTEER HOURS* (DOLLAR VALUE IN MILLIONS)

Value of Volunteer Time Coordinated through UWM in 2012

\$800K

*Based on a figure of \$21.79 per hour calculated by Independent Sector, a coalition of nonprofit and philanthropic organizations.

\$27.3 MILLION

UNITED WAY'S TOTAL
COMMUNITY IMPACT

OTHER DOLLARS INVESTED (IN MILLIONS)

Refund Checks from Volunteer Tax Prep Sites	\$8M
Grant Awarded to UWM for Operation of Tax Sites	\$15K
2-1-1 Call Center (<i>cost of operation</i>)	\$720K
<i>Goodfellows</i> Charities Funds Distributed through 2-1-1	\$16K
FamilyWise Rx Card: Savings on Prescription Medication	\$680K
Total Other Dollars Invested	\$9.5M



United Way is committed to supporting programs that serve the most vulnerable in our community, programs that make a measurable change in people's lives. \$10.3 million were invested in this safety net of services in July 2012 in these areas: physical and mental health, basic needs, youth development and academic achievement, mentoring and parent education, housing and income supports, and safety. Here's a snapshot:

Basic Needs

- » \$1.6 million (16%) was invested in programs providing basic human needs such as food, clothing, rent, financial assistance and health care.
- » 92,824 people received assistance with short term needs for food, clothing and shelter during times of crisis or disaster.
- » 3,294 meals were provided to youth and seniors.

Academic Achievement, Youth Development and Mentoring

- » Over \$3.1 million (30%) was invested in programs helping children and youth succeed in school.
- » 3,756 services improved academic achievement for children and youth in Douglas, Sarpy and Pottawattamie counties.
- » 579 preschool-aged children learned basic colors, letters, numbers and language skills necessary for kindergarten.
- » 2,474 youth increased their grades in math, reading and science which helped them succeed in school.
- » 672 youth gained skills to prepare for college and careers. Students completed ACT testing, and participated in campus visits, job shadowing and career counseling.

Mental Health

- » Over \$1.5 million (15%) was invested in programs helping people increase basic coping skills to achieve mental health.
- » 3,554 people reduced drug and alcohol use, taking the steps necessary to overcome depression and build strong support systems.

Note: Individuals may be counted more than once in the totals due to clients receiving multiple services from the same agency or receiving services from multiple programs.

2011-2012 COMMUNITY CARE FUND DOLLARS INVESTED – BY PROGRAM

\$10,333,285





“Community Strong” Commitment

Unique talents and resources at United Way serve our community in other ways, too.

Individuals and families across Nebraska and Southwest Iowa face challenges every day, and the 2-1-1 call center helps our neighbors take the first steps to overcome them.

When someone dials those three numbers – any time of day or night – information and referral specialists in the Omaha call center tap into a vast database of health and human services to find the best resources suited to each caller’s needs.

2-1-1 fielded 75,636 calls in 2012. This was nearly equal to call totals in 2011, even though the Missouri River flood elevated call volume that year. Without a similar public emergency in 2012, there was growth in general awareness of the call center, growing local needs, or a combination of the two.

The most frequently reported need in 2012 was for housing and utility assistance, accounting for 48% of all calls. Requests for food assistance rose more than 13% in 2012, after posting a 60% increase the year before. Other callers sought information on:

- » Family support issues
- » Health care
- » Legal and public safety information
- » Assistance with household items and clothing
- » Toys for Tots

2-1-1 PARTNERSHIPS

All calls to 2-1-1 are confidential, and the call center is certified by the National Alliance for Information and Referral Systems. Nearly 90% of Americans can now dial 2-1-1.

The call center helps the *Omaha World-Herald Goodfellows* Charities distribute one-time-only emergency assistance to those who meet the program’s guidelines. 2-1-1 also processes requests for holiday assistance for the Council Bluffs *Daily Nonpareil*.

United Way donors in the Metro Omaha area and in eight other Nebraska communities provide the financial support to keep 2-1-1 available to those in need.

United Way coordinates gifts of time and expertise that benefit our entire metro area.

COMMUNITY SERVICE

United Way's **Court Referral Community Service** program connects offenders in the Douglas County Court system with meaningful volunteer projects.

In each case, the court assigns a specific number of unpaid hours of work for the community's benefit, and it must be performed within a designated time period. When offenders complete their service hours to the judges' satisfaction:

- » it saves county taxpayers the cost of incarceration
- » the offenders avoid going to jail, and
- » their labor helps local nonprofits and other organizations get their important work done

Approximately 600 people are participating in the program at any point in time. 93% of the court-ordered volunteers successfully completed their service in 2012. Since 1999, nearly 8,600 of our neighbors have paid their debt to our community through their court-ordered service in this important partnership with the Douglas County Court.

READY TO SERVE IN TIMES OF CRISIS

Medical professionals volunteer their time and expertise through our organization, too. At the end of 2012, there were 614 doctors, nurses and other health experts who signed up to serve our area through the **Eastern Nebraska-Western Iowa Medical Reserve Corps** (MRC).

The MRC, a United Way program, works collaboratively with local emergency management agencies and response programs to provide the necessary surge capacity needed following a disaster or health emergency. For instance, members assisted with flu vaccination clinics and flood relief efforts in the past several years.

To stay sharp and develop strong community relationships, MRC members train regularly, volunteer their time at public health screenings and provide first aid at fundraising walks and runs. The local unit has received state and national recognition for its work.

CORPORATE AND GROUP VOLUNTEERING

In addition to the thousands of corporate employees who donated their time to help on the 2012 fundraising campaign, there were still others who rolled up their sleeves to help out at United Way's nonprofit partner organizations on **"Days of Caring 2012"**.

About 300 employees from nine local companies spent August 28th and 29th working on projects that the charities might not otherwise have completed, including painting, landscaping and organizing donated items. The nonprofits included American Red Cross-Loess Hills Chapter, Boys and Girls Clubs of the Midlands, Catholic Charities in Omaha and the Phoenix House in Council Bluffs, Girls Incorporated, Heartland Family Service, MICA House, The Salvation Army and YMCA of Greater Omaha.

Members of United Way's Women's Leadership Council also gave their time at Completely Kids, stocking backpacks with food for children who might otherwise go hungry over the weekend.



MARSHALLING RESOURCES FOR A BETTER TOMORROW

Raising the Funds

Positive change doesn't happen without concerned citizens – generous individuals, companies and foundations. They trust United Way to assess the situation and bring the right people together to get the job done.

Under the leadership of Dan and Alison O'Neill of First National Bank, the 2012 United Way fundraising campaign hit a new record: \$23,105,000 pledged in 12 short weeks. It took planning and thousands of volunteers to hit that mark. More than 70,000 people donate their hard-earned dollars each year. They come from all walks of life: school children, seniors, plant workers and CEOs.

Whether it's a dollar a week from a new employee or a \$10,000 leadership gift – all donors come together for a common cause: to champion those who want a better life.

Combined Federal Campaign (CFC)*

Employees in the federal workforce achieved success in their own 2012 drive. The Heart of the Midlands CFC includes the men and women in all U.S. Government offices across most of Nebraska, 35 counties in Iowa and one in South Dakota. Led by local chair General William Grimsley, area federal workers contributed over \$1.2 million to be distributed to donors' chosen charities in the heartland and around the world.

*As the Principal Combined Fundraising Organization (PCFO), United Way of the Midlands is required to report that its federation members are charged no member dues and/or service fees.



FUNDED COMMUNITY PARTNERS

American Heart Association –

Heartland Affiliate

American Red Cross, Heartland Chapter

American Red Cross, Loess Hills Chapter

Big Brothers Big Sisters of the Midlands

Boy Scouts, Mid-America Council

Boys and Girls Clubs of the Midlands

Catholic Charities Council Bluffs/

Des Moines Diocese

Catholic Charities –

Omaha Archdiocese

Charles Drew Health Center

Child Saving Institute

Completely KIDS

Council Bluffs Senior Center, Inc.

Family Housing Advisory Services, Inc.

Girl Scouts Spirit of Nebraska

Girl Scouts of Greater Iowa

Girls Incorporated

Heartland Family Service

HELP Adult Services

Jewish Federation of Omaha

Kids Can Community Center

Latino Center of the Midlands

Lutheran Family Services of

Nebraska, Inc.

MICAH House

Offutt Youth Center

Ollie Webb Center, Inc.

OneWorld Community Health

Centers, Inc.

Ponca Tribe of Nebraska

The Salvation Army

Urban League of Nebraska, Inc.

Visiting Nurse Association

Women's Center for Advancement

YMCA of Greater Omaha

Community Health Charities of Nebraska

Distribution of 2011 Fall Campaign in 2012 (in millions)

2011 Fall Campaign Pledges	\$22.7
Estimate of Uncollectible Pledges	(\$0.9)
Allocation to Board Designated Reserve	(\$0.3)

Net Available for Distribution	\$21.5
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Operating Expenditures

Fundraising and Administration	\$2.3
UWM Direct Services and Program Funding Process	\$1.7

Total Operating Expenditures	(\$4.0)
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Funding for Services

Community Care Funding to Partner Agencies	\$11.1
Designations to Partner Agencies	\$1.7
Designations to Unaffiliated Agencies	\$3.0
Community Health Charities of Nebraska	\$1.0
Community Initiatives	\$0.3

Total Funding for Services	(\$17.1)
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Surplus	\$0.4
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NOTE: Surplus due in part to staff vacancies which were held open pending strategic planning process.

Statement of Position (as of June 30, 2012)

Assets

Cash and Investments	\$13.0
Pledges Receivable	\$6.8
Other Assets	\$2.8
Property and Equipment	\$1.3

Total Assets	\$23.9
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Liabilities and Net Assets

Accounts Payable and Accrued Expenses	\$0.6
Designations, Allocations and Grants Payable	\$14.0

Total Liabilities	\$14.6
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Total Net Assets	\$9.3
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Total Liabilities and Net Assets	\$23.9
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United Way of the Midlands' full audit/Form 990 available at www.uwmidlands.org/financials

55% Program Funding

4% Uncollectible

3% Reserve and Surplus

7% UWM Services

10% Administrative

21% Designation




A NEW LIFE

Domanick and Taitiana were struggling to make ends meet. Taitiana was unemployed and the young couple didn't have the resources to keep up with the cost of raising two young children. They needed help turning their lives around and found it through the United Way funded Center for Healthy Families, operated by Lutheran Family Services of Nebraska.

Both parents began attending weekly parenting classes to learn the best practices for navigating parenthood. The Center's unique boutique program rewarded their commitment with diapers, a car seat and other necessities. The staff also helped Taitiana find a job and both parents are now enrolled in college courses.

Together, they've learned how to become the best parents they can be and their relationship has strengthened because of it. "They're teaching us how to parent a totally different way," said Taitiana. "They're teaching me how to improve my parenting skills so my daughter doesn't end up in this Center when she's my age." For Domanick, it's about defining his responsibilities and his life in a new way. "Anybody can have kids but to really take care of them, that's what makes you a man."



READY IN 5

Living as refugees was a very traumatic experience for Klaw Mu and her sister. When their family moved to the United States, they had trouble adjusting to the changes. Their parents signed them up for *Ready in 5*, an early childhood education collaboration between Heartland Family Service and YMCA of Greater Omaha, dedicated to preparing immigrant children for school. During the first six months of the program, they wouldn't participate in group projects or do anything without their father.

The staff began working one-on-one with each of the girls, giving them the extra attention they needed to keep up with the other students. Slowly but surely, the girls became comfortable with their new surroundings and began to flourish. Now, they are independent and excited to learn. They've made many new friends, complete all of their homework successfully and are rarely seen without huge smiles. Thanks to the *Ready in 5* program, Klaw Mu and her sister are on their way toward a successful future.



A FAMILY'S SAFE PLACE

When Erin needed a safe, affordable before- and after-school program for her children, she turned to Kids Can Community Center. Her children were able to thrive in a supportive environment, building lasting friendships while adding to their education. When teachers identified behavioral issues with her youngest son, they referred Erin to a counselor who helped her son learn new ways to cope.

Then, a difficult divorce left Erin as a single mother, attempting to provide for her children on a limited income. Their holiday season looked bleak until she learned about seasonal assistance offered through the community center. She applied and was able to receive gifts and the support she needed to get through the holidays.

For Erin, it's reassuring to know there's a center that provides for all of her family's needs, especially during the holidays. "I'm so thankful for this place," said Erin. "I was just in tears because I felt so blessed and so thankful that there was something out there that could help my family through a hard time."



2012-13 Citizens of the Year Award

Nancy and Mike McCarthy

Nancy and Mike McCarthy join an esteemed group of philanthropists and community leaders as they become United Way of the Midlands' 47th and 48th "Citizens of the Year."

The McCartlys chaired the annual fundraising campaign in 2002, and led the prestigious Tocqueville Society in 2007 and 2008.

Mike is chairman of McCarthy Group, an investment holding company, and he serves on the boards of Heritage Services, Lasting Hope Recovery Center, Joslyn Art Museum Foundation and Creighton University. Together, they served as grand marshals of the River City Rodeo.

Nancy is a long-time supporter of young contestants in the "Catch-a-Calf" competition at the 4-H livestock show. She is a member of the Midwest Geriatrics' board of directors.

We celebrate their dedication to family, their generous spirit and their commitment to building a strong community.



WE ARE COMMUNITY STRONG

When we look at our community, we don't just see "what is." We see what could be, and should be. We see opportunity and potential. And resolve. We're energized by the call to marshal the resources needed to make a positive impact. We invest ourselves in this community because this is more than where we live.

This is who we are.



We will champion those who are in the fight to better themselves, and others.

We will skillfully combine passion and reason.

We will build up what has fallen, and create what should have been here all along.

We are United Way.

*And WE ARE **COMMUNITY STRONG.***