



United Way of the Midlands'
Fiscal Year Highlights
July 1, 2020 – June 30, 2021

2020 - 2021 Board of Directors



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President and CEO
Cobalt Credit Union



Mickey Anderson
President,
Baxter Auto Group



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Vice President,
Enterprise Data Management
FNBO



Nate Dodge
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NP Dodge Company



Joel Falk
Regional President,
UMB Bank



Shawna Forsberg
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Emerging Leaders Board Liaison
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CHI Health



Cory Shaw
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Chief Operating Operator
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Dan Waters
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Partner,
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Tim Burke
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Omaha Public Power District



Susan Courtney
Executive Vice President,
Operations & Clinical Effectiveness
Blue Cross Blue Shield of Nebraska



Jerry Crouse
Vice-Chairman and CEO,
Tenaska, Inc.



Bob Gunia
Senior Vice President, Public Affairs Group
Physicians Mutual



Jamie Gutierrez
CEO and Owner,
Midwest Maintenance Companies, Inc.



Ia Hagan,
Women United Board Liaison
Financial Advisor
Wells Fargo



Dr. Cheryl Logan
Superintendent,
Omaha Public Schools



Clark Ponthier
Senior Vice President,
Supply Chain & Continuous Improvement
Union Pacific Railroad



Jim Richardson
Partner and Nebraska Audit Lead
RSM US LLP



Financial Report

Fiscal Year 2020-2021

REVENUES

\$ in Millions

Campaign Contributions	\$15.9
Program Revenue	<u>\$5.8</u>
Other Revenue Items (Grants, Fees, Investments, etc.)	\$3.0

Gross Revenues*	\$24.8
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DISBURSEMENTS

Funding to Community Programs and Services	(\$15.1)
Community Services Provided by UWM	(\$ 6.4)
Fundraising and Operating Expenses	(\$ 2.0)
Total UWM Disbursements	(\$23.5)

EFFICIENCY RATIO:

93 cents of every donor dollar invested into the community.**

* After less allowance for collection loss the total net revenue is \$24.4 million.

** Calculated overhead rate, per generally accepted accounting principles is 10.3%. The difference between this and the 92 cents of donor dollars going to the community relates to nonprofit accounting requirements to include such things as in-kind gifts in both revenue and expense. Neither of these adds to or detracts from community investment, and when they cancel each other out from the calculation, the 92 cents reflects the true donor impact.

United Way of the Midlands' audited financial statements and Form 990 will be available at UnitedWayMidlands.org/Financials once filed.

Citizens of the Year



There are so many caring and committed community members in our metro. With advice and counsel from the previous Citizen of the Year recipients, United Way of the Midlands is proud to name a special couple for this year's recognition: Jim and Diny Landen.

Jim Landen serves as Chairman of Security National Bank, a local community bank, founded by his parents Clarence "Mickey" and Mary Landen in 1964. Security National has steadily grown serving the Omaha-Council Bluffs area as well as Des Moines and Dallas, Texas. Jim has been active with the American Bankers Association Community Bankers Council, Federal Reserve Bank Advisory Council and the Nebraska Banker's Association. Additional involvements have included serving on the boards of the Greater Omaha Chamber of Commerce, Clarkson Regional Healthcare Services, Children's Hospital, Nature Conservancy, Inclusive Communities and the Salvation Army. He also served on the National Salvation Army board.

Diny Landen started KKCD radio station and was co-owner/publisher of a local magazine. Today, she serves as Chairman and EVP of Noalmark Broadcasting Company which operates radio stations in Arkansas and New Mexico. Diny is also active in board and management roles in several companies including Murphy USA (NYSE: MUSA). Her board service includes Joslyn Art Museum, Omaha Community Foundation, Lauritzen Gardens Antiques Show and Westside Community Schools Foundation. She also served as board chair for Project Harmony, American Red Cross and Girls, Inc. She values her long-time involvement with United Way of the Midlands which included chairing the board, the Planning and Allocation Committee and the first Tocqueville Women's Initiative Advisory Committee.

Diny grew up in El Dorado, Arkansas and Jim has deep roots in Omaha. They met in college at Southern Methodist University where they both graduated with business degrees. Together, they have been active in the 30 years across civic, social, arts and health and human services organizations. They were 2016 honorees for Nebraska Coalition for Lifesaving Cures.

They share a commitment to family and community. Currently, their three sons all live and work in Dallas: James, Wilson, and Charlie and his wife Bridger. James is Market President of Security National Bank of Texas which was started in 2020. Jim and Diny treasure the times they share with their children traveling, enjoying sports/sporting events and vacationing at Lake Okoboji. They know they have been blessed to live and work in Omaha and value the friendships they have formed through their various business and community activities.

View their Citizens of the Year video here: https://youtu.be/-4U_UiOcx44

Annual Meeting Award Winners

The UWM Campaign Recognition Awards honor those companies who went above and beyond to support United Way of the Midlands during the 2020 campaign.



Volunteer Organization of the Year

This award is presented annually to a company that consistently strives to improve our community through volunteerism. Selection is based on the percentage of a company's total employees who participated in UWM volunteer events during the previous campaign year.



Buildertrend has engaged with UWM across a spectrum of volunteer opportunities. The group was the first company to participate in United Way's Good on the Go program in August 2019. In 2020, the challenges of volunteering during the pandemic did little to dampen the resolve of Buildertrend employees. Since November 2020, volunteers have partnered with UWM to safely engage in projects with seven agencies including Completely KIDS, Family, Inc., and Siena Francis House. UWM is also grateful to have a member of the Buildertrend team serving on the UWM Campaign Cabinet.

Buildertrend started in 2006 in the basement of one of the owners' homes and today is the gold standard in construction project management software. In 13 short years, the company has grown from the original 3 employees to 540 employees in 2019 headquartered in Omaha.

Runners-Up: Streck, JE Dunn

New Business Partner of the Year

This award is presented to a business that recently chose to invest in our community through United Way of the Midlands. Businesses that did not donate to UWM in the previous campaign year are eligible for consideration.

FACEBOOK

FACEBOOK

During a year of great need, Facebook partnered with UWM to support our neighbors, and further our efforts to foster community. Facebook is committed to "give people the power to build community and bring the world closer together." We were honored to have Facebook sponsor the Power Within You virtual event featuring Chris Gardner. Facebook also served as a sponsor for our Day of Action initiative that, with our other community sponsors, made it possible for the \$136,815 raised on April 8th to go directly back to the community by covering the costs of the initiative.

Facebook's history is well-known: starting in Cambridge and ending up one as of the largest tech companies in the world. Facebook broke ground on its first building in Sarpy County in 2017. They are now planning a new 3.6 million square foot data center to open in 2024. We are honored to partner with the Facebook team, and look forward to building upon the strong foundation established during this critical year.

Runners-Up: Ideal Images

Corporate Partner of the Year

This award is presented to businesses in four different employee size ranges that have shown an exceptional level of dedication to United Way of Midlands and the community through their corporate campaign fundraising efforts. To be eligible, the organization's total gift must exceed \$3,000. Selection criteria include the year-over-year growth of their United Way campaign and per capita giving.

Under 100 Employees – Diversified Financial Services



Diversified Financial Services has been a dedicated partner of UWM since 2004. During their 2020 campaign, they exceeded the amount raised through their 2019 campaign by a nearly 60% increase. Diversified Financial is a dynamic financial services company that provides retail financing, leasing, & insurance programs for the agricultural industry. Since its founding in 1969, Diversified has focused on relationships. They take pride in their ability to meet their partners' needs through exceptional customer service.

Runners-up: Central States Health and Life

100-199 Employees – AG Processing



Ag Processing has been a proud partner of UWM for over 30 years. During the 2020 campaign year, they had a 73% participation rate among employees and raised more than \$280,000. AGP was founded by 3 companies in 1983 and is now the largest cooperative soybean processing company in the world and a leading supplier of soybean meal and refined vegetable oils. They operate ten soybean processing plants in Iowa, Minnesota, Missouri, Nebraska, and South Dakota as well as four soybean oil refineries and three bio diesel production facilities.

Runners-up: ACCESSBank, Lindsay Corporation

200-799 Employees – American National Bank



American National Bank has generously donated to our community through UWM for over 30 years. During the 2020 campaign year, they increased the amount they raised for UWM in the previous year by 13%, raising \$44,858. They increased their giving significantly with both a new Campaign Manager and with a new CEO, Javson Hanson. Jason's involvement from the kickoff to the close, sent a great message of caring for our community to the entire American National team.

American National was established as The Bank of Florence Territory in Nebraska in 1856. Since that time, they have grown to become one of the largest banks in the region with major operations in Nebraska, Iowa and the Twin Cities in Minnesota. They employ over 440 employees and remain headquartered in Omaha.

Runners-up: Security National Bank

800+ Employees – FNBO



First National Bank of Omaha has been a proud partner of UWM for more than 30 years. CEO Clark Lauritzen and his wife Emily were the UWM Campaign Chairs for 2020-2021. They were not discouraged by a worldwide pandemic and instead viewed the campaign as the opportunity to be Omaha's finest moment. Under their leadership, UWM will be able to fund many programs that will continue to help our neighbors recover. In FNBO's employee campaign, they increased the amount raised in the 2019 campaign by nearly 50%, raising more than \$1.1m for the community. In addition to their employee campaign, FNBO generously sponsored multiple events including an event featuring Chris Gardner and Day of Action. We are truly appreciative of Clark and Emily's leadership and generosity over the last year.

FNBO is a family-owned bank whose success dates back more than 160 years. FNBO and its affiliates are proud to be the 4th largest agriculture lender in the country. They are also one of the largest commercial bank finance providers to the ethanol industry.

Runners-up: Physicians Mutual, Lozier Corporation