



Metro United Way

LIVE UNITED

2017/2018 REPORT TO THE COMMUNITY

DEAR FRIENDS,

Over the last year at Metro United Way, we have leaned into the areas where we have seen the most impact. We are developing a national reputation for our work at connecting the dots between health, education and financial independence as the only way to break the cycle of poverty and create opportunities for all. No single organization, no matter how effective, can address the complex issues facing our community, which is why Metro United Way is more important than ever.

Some of our favorite successes from this year include:

- Partnering with the Humana Foundation to make households financially self-sufficient by creating a network of coaches across our community. This evidence-based approach is built on a pilot in which the average individual increased their income by \$600 per month.
- Saving more than \$1.5 million in prescription drugs for individuals and families in our community through a national partnership with FamilyWize.
- Serving 6% of this year's incoming kindergarteners through our Excellence Academies, whose participants are two times more likely than their peers to show up ready to learn.
- Expanding our investment in quality out-of-school time providers serving high-need youth, which independent evaluation indicates is reducing suspensions, improving attendance and increasing academic performance in reading.
- Elevating our work on Black Make Achievement through a set of prestigious national and local partnerships and investments in life-changing initiatives like the W.E.B. DuBois Academy, which provides Afrocentric and multicultural curriculum for more than 150 young men.
- Engaging more than 22,000 volunteers who gave 83,911 hours of service valued at over \$2 million to serve nearly 20,000 people across our seven counties.

Looking ahead, we are investing in technologies that have the potential to transform our community and leverage United Way's unique network to bring them to scale. Building on the foundation of 2-1-1's regular connections with more than 17,000 community programs, our United Community initiative is connecting health, education and social service organizations to improve the speed, reliability and accountability of referrals and care provision between organizations.

With more than 500 social workers, nurses, school counselors and case workers across 50 agencies in year one alone, United Community is an ambitious effort to transform how our community aligns resources and lifts up families and individuals throughout their lifetime. It is also proof of what can happen when philanthropy, individual donors, corporate partners and community organizations unite.

At Metro United Way, we do so much more than just fund our partners. We align them around shared community goals and address issues that go beyond any single organization's work. Together, we are building on our 100-year history to create an organization and a community that is leaning into the next 100 years.

Thank you for joining us in this life changing work!

Sincerely,



Theresa Reno-Weber

Theresa Reno-Weber
President & CEO
Metro United Way



Kent Blake

Kent Blake
Chief Financial Officer
LG&E and KU Energy

STAND WITH US AND LET'S GET EVERYONE ON THEIR FEET

Every time someone decides to give, advocate or volunteer, it inspires someone else.
When we all contribute, we can get everyone in our community standing on their own.
Let it start with you and let it start right now.

WE KNOW WHAT WORKS BECAUSE WE HAVE THE DATA

Our programs succeed in leveling the playing field for those most in need. We use data and evidence to create, fund and operate programs and initiatives like Excellence Academies, Black Male Achievement, and Farmers Feeding Families, among many others, to uplift the community by empowering each individual to stand on their own two feet.





START UNITED




KANE'S STORY: NOT ANOTHER STATISTIC

Kane's early learning journey started a little rocky as he rarely used words to communicate and often withdrew from classroom participation. After multiple doctor's visits and no answers, Kane was enrolled at the Children's Learning Center at Goodwill of Southern Indiana - one of our Excellence Academies. Within seven weeks, Kane began speaking by saying things like "I want drink" and "give me food." He also learned the alphabet, is learning his numbers and knows his colors.

EARLY CHILDHOOD SUCCESS

When we can get kids off to a good start, it allows them to build up a head of steam so that successes later in life can come easier. This is accomplished by focusing on parents having access to quality childcare, engaging parents and caregivers community wide and getting preschoolers ready to win at kindergarten.

COMMUNITY CONDITIONS

There are
Nearly **74,000**
 Children under
the age of 5 in
our service area.

45% Of the children in
Jefferson County are not
ready to learn when they
enter kindergarten.



CREATING THE IMPACT

PREPARED
6,300
CHILDREN TO
ENTER SCHOOL
READY TO LEARN

7%
INCREASE OF CHILDREN
PREPARED FOR
KINDERGARTEN THROUGH
READY FOR K ALLIANCE

CHILDREN IN
METRO UNITED WAY'S
EXCELLENCE ACADEMIES ARE
2X
MORE LIKELY TO ENTER
KINDERGARTEN
PREPARED.





GROW UNITED



BRANDON'S YOUTH SUCCESS STORY

Brandon knows first-hand the power of out-of-school time (OST) programs. Being raised in West Louisville by a single parent, Brandon's life could have turned out very differently if he hadn't been exposed to the Black Achievers program at the Chestnut Street YMCA, one of Metro United Way's funded partners. Today, though, this high-school and college graduate credits Black Achievers for making his success possible and putting his quest for a Masters of Education in Instructional Leadership within reach.

YOUTH SUCCESS

Students only spend 20% of their lives in school, so it's important that learning continues outside of the classroom. By establishing a system that helps steer local students toward high-quality out-of-school time programs, Metro United Way hopes to provide a stronger educational foundation to help decrease the high school drop-out rate and increase the pursuit of college degrees, thus benefiting the entire community in the long run.

COMMUNITY CONDITIONS

43%

of our local high school students are not college or career ready when they graduate.



**3RD GRADERS READING
AT GRADE LEVEL**

=

56%
IN KENTUCKY

& 68%
IN INDIANA

CREATING THE IMPACT

OVER
20,000

YOUTH BENEFITED FROM
QUALITY OUT-OF-SCHOOL
PROGRAMS

13%

INCREASE IN QUALITY
IMPROVEMENT IN PAST THREE
YEARS FOR AFTER-SCHOOL
PROVIDERS PARTICIPATING
IN BLOCS

LOCAL DATA CONFIRMS
REDUCED SUSPENSIONS
AND ABSENCES FOR STUDENTS
PARTICIPATING IN NONPROFIT
AFTER-SCHOOL PROGRAMS
THAT HAVE INCREASED
THEIR QUALITY



A close-up photograph of a Black woman with short, curly hair hugging a young girl with similar curly hair. The woman has her eyes closed and a gentle smile, while the girl is smiling broadly. The background is softly blurred, showing hints of an outdoor setting with greenery.

WORK UNITED

A circular, black and white portrait of a woman with blonde hair, identified as Maddie, smiling. She is holding a young boy, identified as Madden, who is also smiling. The image is set against a light background.

MADDIE & MADDEN'S JOURNEY

Maddie knew that she wanted to be a nurse from the moment her son was born. But first she needed help achieving financial stability. She sought help from one of Metro United Way's funded partners, the Family Scholar House, through their financial independence programming. While Maddie attended classes, her son, Madden, attended pre-school at the Early Learning Campus on site at the Family Scholar House. Maddie graduated and is now a nurse for Norton Healthcare. Both she and Madden have exited the residential program at Family Scholar House and she is working to purchase her own home.

FINANCIAL INDEPENDENCE

People do amazing things when their focus isn't on their next meal or making rent. Metro United Way helps build a ladder for people to climb the hierarchy of needs so they can succeed. We might not be able to fix the cycle of poverty, but we can break it by providing people with financial literacy, marketable skills, and hope.

COMMUNITY CONDITIONS

10% Of families live in poverty across our region.



87
HOURS
OF WORK
PER WEEK

Are needed for a person at the minimum wage of \$7.25/hr to afford a modest two-bedroom apartment at fair market rent.



39% Of our workforce does not earn enough to be able to afford a two-bedroom unit at fair market rent.



CREATING THE IMPACT

MORE THAN
\$15M

IN TAX REFUNDS
RETURNED TO FAMILIES
FROM FREE TAX INCOME
ASSISTANCE

2,169

PEOPLE RECEIVED JOB
SKILLS TRAINING AND 86%
OF THEM ATTAINED GAINFUL
EMPLOYMENT IN THEIR
FIELD OF CHOICE

192

FAMILIES RECEIVED
COACHING TO IMPROVE
FINANCIAL AND HOUSING
STABILITY.



THRIVE UNITED



ROBERTA'S STORY: THREE DIGITS SAVED A LIFE

Roberta made a call to 2-1-1 a few years ago when she was worried about her elderly grandmother who lived alone at the time. "My grandmother was my rock. And when I heard that she had fallen and was left alone, injured...I knew it was the end and she couldn't stay there anymore," says Roberta. "I called 2-1-1 and they gave me several phone numbers to call the next morning." Through 2-1-1, Roberta was able to find her grandmother the healthcare and housing that she urgently needed.

HEALTHY LIVES

Being in good health doesn't come down to luck. With a little education, good healthcare, and meeting basic needs, we can help others make healthy choices too. By providing a network of services for people's most basic needs of food, shelter, health and safety, we can ensure that children and families have not only what they need, but also what they need to know to live healthy lives.

COMMUNITY CONDITIONS

9%

Of our population does not have health insurance, creating a barrier to health access.



1 IN 6

Individuals in our community are at risk of hunger.



11%
OF YOUTH IN
KENTUCKY

& 15%
OF YOUTH IN
INDIANA

=

**REPORTED AT LEAST ONE
DEPRESSIVE EPISODE LAST YEAR**

CREATING THE IMPACT

**SERVED
110,000**
CALLS FOR HELP
THROUGH OUR
2-1-1 HELPLINE

43,138
INDIVIDUALS RECEIVED
HEALTHY FOOD THROUGH OUR
PARTNER AGENCIES

\$1.5M
WAS SAVED BY INDIVIDUALS
AND FAMILIES ON
PRESCRIPTION DRUGS
THROUGH FAMILYWIZE
PRESCRIPTION
CARDS

FINANCIAL RESULTS

(Fiscal Years Ended April 30, 2018 and 2017)

INCOME:

	APRIL 30, 2018	APRIL 30, 2017
Annual Campaigns, net of collection loss	\$27,729,358	\$18,849,678
Grants and other income.....	\$505,656	\$202,072
Income from investments.....	\$588,815	\$706,397
Fees and miscellaneous sales.....	\$95,378	\$23,309
Rental income.....	\$15,040	\$14,407
Total Revenue.....	\$28,934,247	\$19,795,863

EXPENSES:

Fundraising	\$2,919,661	\$2,954,316
Management & General	\$1,743,892	\$1,736,605
Community Investments.....	\$15,277,366	\$15,716,617
Total Expenses.....	\$19,940,919	\$20,407,538
Pension related changes other than net periodic pension costs.....	\$426,192	\$1,542,406
Total increases/(decreases) in net assets.....	\$9,419,520	\$930,731

ACCOUNTABILITY CHECKLIST

TRANSPARENCY

All supporters, partners and others have access to Metro United Way documents on our website at metrounitedway.org, including:

- Our mission and how we accomplish it
- Summary of annual audited financials
- IRS tax return (Form 990)
- Annual Report
- Board of Directors roster
- Partner listing
- Donor Bill of Rights

VOLUNTEER-LED ORGANIZATIONAL SELF-ASSESSMENT

Every three years, Metro United Way evaluates organizational performance by conducting a volunteer-led self-assessment. The last organizational self-assessment was conducted in Fall, 2016. Our complete audited financial statement can be found on Guidestar at guidestar.org.

Does Metro United Way have an active Board of Directors comprised of citizen leaders that meets regularly?

The Board is comprised of 44 local community leaders representing business, government and other sectors.

Does the Board of Directors review and approve the annual budget and monthly financial statements?

The annual budget and monthly financial statements are approved by the Board following thorough review by the Finance Committee.

Does the Board of Directors review and approve the annual independent audit report, as well as the auditor's management letter comments?

The annual audit is approved by the Board following thorough review by the Finance Committee and the Executive Committee.

Does the Board of Directors review its bylaws and governance documents at least once every three years?

Yes

Does Metro United Way have additional oversight committees?

Yes, Finance Committee, Human Resources Committee, Investment Committee and Community Impact Cabinet.

Does Metro United Way have ethics and conflict of interest policies?

The Board members and staff are required to sign a Code of Ethics and a Conflict of Interest Statement annually.

Does Metro United Way adhere to an investment policy approved by the Board of Directors?

Yes

Does Metro United Way have a diversity and inclusion policy?

Yes

Is the CEO's performance and compensation reviewed and approved?

The Board Chair heads a five person committee that reviews the CEO's performance and recommends a salary adjustment for approval by the full Board.

Is the senior management team's performance and compensation reviewed and approved?

The CEO conducts annual performance appraisals of the senior management team. The Board of Directors and Executive Committee approve the salary adjustment "pool" that is distributed to all staff.

Does Metro United Way prohibit providing donor information to third parties?

Yes

Does Metro United Way have adequate insurance coverage?

Yes

Does Metro United Way have a Board-approved business expense reimbursement policy?

Yes

METRO UNITED WAY – BOARD OF DIRECTORS

Theresa Reno-Weber
Board President & Secretary
Metro United Way

Mr. Kent W Blake
Board Chair
LG&E and KU Energy LLC

Mr. Henry A. Erk III
Board Treasurer
Mercer Retirees

Dr. Muhammad Babar
Kentuckiana Geriatrics & Palliative
Services

Mr. Amer Beharic
Norton Healthcare

Mr. Michael Betson
UPS Air Group and Air District

Mr. Jeffrey A. Calabrese
Stoll Keenon Ogden PLLC

Ms. Angela M. Corbett
GE Appliances, A Haier Company

Dr. Karen M. Cost PhD
Norton Healthcare

Mrs. Gale R. Cox
Re/Max Real Estate Center

Ms. Ashley N. Duncan
Jefferson County Public Schools

Mrs. Nicole R. Durbin
Citizen's Union Bank - Bullitt County

Mr. Kenneth M. Eddy
Leadership Southern Indiana

Mr. Donovan A. Fornwalt
Council on Developmental Disabilities

Mr. Jose Ricardo Gaztambide Vila
Interapt

Mrs. Elaine M. Gravatte
D.D. Williamson & Co., Inc.

Mr. Pat Hargadon
Farm Bureau Insurance

Ms. Natalie H. Harris
Coalition For the Homeless

Mr. Jerry Henderson
BKD, LLP

Mr. Chris Hermann
LG&E and KU Energy Retirees

Dr. Louis S. Jensen Jr.
NAFC Schools Admin/data/spec ed 04

Mrs. Aimee M. Jewell
University of Louisville

Mr. Mark A. Kristy
PwC Retirees

Mr. Suhas Kulkarni
Indus Law Firm

Mr. Glenn E. Levine
US Bank - Jefferson Co.

Charlon McIntosh
Humana Inc.

Mr. Robert A. McIntosh
Community Volunteer

Mr. Jeffrey W. Nally
Nally Group

Mr. Greg Newbern
Brown-Forman Corporation

Mr. Kent Oyler
Greater Louisville Inc.

Mr. Hex Persephone
Community Volunteer

Lauren Wood Peter
CoBank, Louisville Banking

Mr. Martin A. Pollio
Jefferson County Public Schools

Ms. Holly Prather
Leadership Louisville Center

Mr. Carlos Rivas
ProFormance Health and Well-Being, LLC

Mr. Tim Sanders
UAW 862

Mr. Randy W. Schuette
American Synthetic Rubber Company, LLC

Ms. Kelly W. Schulz
Frost Brown Todd LLC

Mr. Brad Shafer
University of Louisville

Mr. Nathan Shanks
Logan Lavelle Hunt Insurance & Wealth

Ms. Seema Sheth
Northwestern Mutual

Mr. Jeff Shireman
Shireman Construction

Mr. Alan G. Taylor
NAFC - Prosser Career Education Center

Mr. John T. Taylor
Limestone Bank

Col. Morris A. Turner
Community Volunteer

Mr. Thomas Wallace
PNC

METRO UNITED WAY – FUNDED PARTNERS

EARLY CHILDHOOD AND YOUTH SUCCESS

2 NOT 1 Fatherhood and Families, Inc.
Academy of Music Production Education and Development
Adelante Hispanic Achievers
Americana Community Center
Backside Learning Center
Bates Community Development Corporation
Big Brothers Big Sisters of Kentuckiana, Inc.
Blue Rivers Services, Inc.
Boy Scouts of America Lincoln Heritage Council
Boys and Girls Club of Harrison-Crawford Counties
Boys and Girls Clubs of Kentuckiana
Bullitt County Public Schools
Canaan Community Development Corporation
Centro Latino of Shelbyville, Inc.
Children Have Options in Choosing Experiences
Communities in Schools Clark County
Community Coordinated Child Care
Dorman Preschool Center
Elevate Recreation
Family and Children's Place
First Gethsemane Center for Family Development, Inc.
The Food Literacy Project at Oxmoor Farm
Global Game Changers Children's Education Initiative
Goodwill of Central and Southern Indiana
Highland Park Community Development Corporation
Jewish Community of Louisville
Kentucky Refugee Ministries
Keystone Learning Academy
Learning for Life
Lighthouse Promise Inc. / Lighthouse Academy at Newburg
Louisville Central Community Centers, Inc.
Louisville Education and Employment Partnership
Louisville Urban League, Inc.
Muhammad Ali Museum and Education Center
Nativity Academy at St. Boniface
Neighborhood House, Inc.
New Albany Floyd County Education Foundation
New Directions Housing Corporation
Oldham County Health Department

Oldham County Public Library
Oldham County Public Schools
Our Place Drug and Alcohol Education Services, Inc.
Peace Education Program
Play Cousins Co-Op
Salt and Light Community Development Corporation
Shelby County Public Schools
Society of St. Vincent De Paul Louisville
Southwest Family Ministries
Sowing Seeds with Faith
Spradling
St. Benedict Center for Early Childhood Education, Inc.
St. George's Scholar Institute
United Crescent Hill Ministries
Wesley House Community Services
YMCA of Greater Louisville, Inc.
YMCA of Harrison County
Young Adult Development in Action
Fiscal Agent for YouthBuild Louisville

FINANCIAL INDEPENDENCE

Americana Community Center
Center for Non-Profit Excellence
Centro Latino of Shelbyville, Inc.
Council on Developmental Disabilities, Inc.
Hazel Joyce Wiley Career & Financial Literacy Institute
Legal Aid Society, Inc.
Louisville Asset Building Coalition
Louisville Central Community Centers, Inc.
Louisville Urban League, Inc.
Options Unlimited
Wesley House Community Services

HEALTHY LIVES

American Red Cross Louisville Area Chapter
The Arthur S. Kling Center
Awake Ministries
Bingham Clinic
Blue River Services, Inc.
Bridgehaven, Inc.
Bullitt County Public Schools
Center for Lay Ministries

The Center for Women and Families
Centerstone of Kentucky
Clark County Youth Shelter & Family Services, Inc.
Coalition for the Homeless
Community Chest of Oldham County
Court Appointed Special Advocates of Bullitt County
ElderServe, Inc.
Family and Children's Place
Family Health Centers of Southern Indiana, Inc.
Family Scholar House
Family Worship Center Fiscal Agent for Housing First Coalition
Good News Shelter
Harrison County Community Services, Inc.
Home of the Innocents, Inc.
Hoosier Hill PACT
Hope Health Clinic
Hope Southern Indiana
House of Ruth, Inc.
Jewish Community of Louisville
Jewish Family and Career Services
Kentucky Youth Advocates, Inc.
Kids Center for Pediatric Therapies
Lebanon Junction Church of God of Prophecy, fiscal agent for Turnaround Resource Center
Legal Aid Society, Inc.
LifeSpan Resources, Inc.
Maryhurst, Inc.
Multi-Purpose Community Action Agency, Inc.
Neighborhood House, Inc.
New Directions Housing Corporation
Operation Care, Inc.
Personal Counseling Services, Inc.
Rauch, Inc.
The Salvation Army Louisville Area Command
The Salvation Army of Southern Indiana, Inc.
Shepherdsville First Church of the Nazarene
Tri-County Community Action Agency, Inc.
Uspiritus
Visually Impaired Preschool Services
Wellspring
YMCA of Greater Louisville

WE CAN DO EVEN MORE WITH YOUR HELP

What we're doing together works and we need your help to make it work on a larger scale.
Make a gift, volunteer your time, and inspire others to do the same, today.



Metro United Way

METROUNITEDWAY.ORG