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
President & CEO
Metro United Way

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.
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.

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.
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% & 68% in Kentucky & 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
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.
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 FAMILYWISE PRESCRIPTION CARDS
## FINANCIAL RESULTS
(Fiscal Years Ended April 30, 2018 and 2017)

### INCOME:

<table>
<thead>
<tr>
<th>Description</th>
<th>April 30, 2018</th>
<th>April 30, 2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Annual Campaigns, net of collection loss</td>
<td>$27,729,358</td>
<td>$18,849,678</td>
</tr>
<tr>
<td>Grants and other income</td>
<td>$505,656</td>
<td>$202,072</td>
</tr>
<tr>
<td>Income from investments</td>
<td>$588,815</td>
<td>$706,397</td>
</tr>
<tr>
<td>Fees and miscellaneous sales</td>
<td>$95,378</td>
<td>$23,309</td>
</tr>
<tr>
<td>Rental income</td>
<td>$15,040</td>
<td>$14,407</td>
</tr>
<tr>
<td><strong>Total Revenue</strong></td>
<td><strong>$28,934,247</strong></td>
<td><strong>$19,795,863</strong></td>
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</tbody>
</table>

### EXPENSES:

<table>
<thead>
<tr>
<th>Description</th>
<th>April 30, 2018</th>
<th>April 30, 2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fundraising</td>
<td>$2,919,661</td>
<td>$2,954,316</td>
</tr>
<tr>
<td>Management &amp; General</td>
<td>$1,743,892</td>
<td>$1,736,605</td>
</tr>
<tr>
<td>Community Investments</td>
<td>$15,277,366</td>
<td>$15,716,617</td>
</tr>
<tr>
<td><strong>Total Expenses</strong></td>
<td><strong>$19,940,919</strong></td>
<td><strong>$20,407,538</strong></td>
</tr>
</tbody>
</table>

Pension related changes other than net periodic pension costs

<table>
<thead>
<tr>
<th>Description</th>
<th>April 30, 2018</th>
<th>April 30, 2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pension related changes other than net periodic pension costs</td>
<td>$426,192</td>
<td>$1,542,406</td>
</tr>
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</table>

**Total increases/(decreases) in net assets**

<table>
<thead>
<tr>
<th>Description</th>
<th>April 30, 2018</th>
<th>April 30, 2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total increases/(decreases) in net assets</td>
<td>$9,419,520</td>
<td>$930,731</td>
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</table>
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 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
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  

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
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
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
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.