UNITED WE FIGHT UNITED WE WIN

INFORM INVEST INVOLVE



Heart of Missouri United Way

Volume 1, Issue 4 www.uwheartmo.org OCTOBER, 2018

Committed volunteers help make allocations decisions

often say that the Heart of Missouri United Way is "the community's United Way". I say this because it's important to understand that the funding, along with the decisions on how to issue grants is a community-based decision led by volunteers. Last year, United Way worked with over 1,500 local volunteers in our efforts to fight for evervone in our community. It's through this process that Heart of Missouri United Way takes every dollar and puts it to use in making our community better. I wanted to share the process on our biggest effort in allocating funds and provide more detail on how we accomplish this to make strategic investments in programs.

Heart of Missouri United Way currently provides funding to 33 local agencies in Boone, Cooper and Howard counties whose programs and services fall into one or more of four community impact areas:

- Education: helping children and youth achieve their potential through education by increasing the number of our community's youth who are ready to succeed in school and life.
- Financial Stability (In-



come): working to reduce the number of financially unstable families and individuals and support their financial independence.

- Health: working to increase the number of residents who make healthy choices.
- Basic Needs: investing in services for families and individuals experiencing times of need and empowering them to improve their

It's important to note that only agencies who have been certified through the United Way review process can apply for grant support. This means that every agency has been reviewed by a group of community volunteers who have accounting or finance professional backgrounds. This group certifies that an annual audit and current financial statements are submitted to vouch that an agency is in a secure financial position and have the Council to review all proposals and make funding These perts, business profession-

recommendations. volunteers are members of the community, which may consist of subject matter exals, dedicated volunteers, individuals that may have used United Way funded services in the past, and community stakeholders at large. There is a concerted effort to recruit volunteers that reflect the makeup of our community too. This

visits, written proposals, review of past performance (if available), and participated in group discussions. Volunteers then evaluated and scored all proposals in six categories: · Alignment with United

Way investment strategies (Does the application address one or more of the United Way targeted areas?) Consumer ease of ac-

information gleaned during

agency presentations, site

- cess (Will members of our community in need be able to utilize the proposed ser-
- · Capability to deliver program proposed (Does the agency have the ability and capacity to executive their plans as proposed?) Cost per individual served
- and/or ability to leverage United Way funding to maximize other funding opportunities (How much will the service cost and can other dollars from the City, County or other funders help?)
- Collaboration to advance shared community goals and learning (Every agency needs to work together and leverage each other's strength.)
- How critical United Way funding is to providing the proposed services and/or extending the equity of the services proposed (Does the agency have significant need from United Way or should the funding be obtained from other available sources?)

Once the volunteer lead advisory council make their recommendations, the volunteer-based United Way board of directors then votes to approve funding. Once the board of directors approves the funding, United Way staff are responsible for making sure that all strategic investment agreements, performance measure (out-



Andrew Grabau **EXECUTIVE DIRECTOR / CPO** HEART OF MISSOURI UNITED WAY

comes), and reporting are completed during the term of the grant. At the conclusion of every grant cycle, every agency must reapply for a new grant- there are no "rollovers" or guarantees that a past grant will be renewed with a new grant. All agencies must go through the process as listed above as a way of ensuring that your dollars continue to meet the needs of the community.

Finally, I can't stress enough how this process of Community Impact investment relies on data when analyzing the results of each investment. United Way requires every grant recipient to submit annual reports detailing the units of service provided and the outcomes achieved. This reinforces our commitment to using the community's dollars to the fullest and ensuring they are not wasted. What I have seen in my 3 1/2 years at United Way is that this process ensures that funding amounts and decisions are not done with hidden agendas or with favoritism. Instead, they are done with an eye on how to have the greatest impact in helping those who are in need and making sure it's done strategically and transparent.

Please rest assured that when you make a gift to United Way, your support is closely watched from beginning to end.

35 community volunteers spent approximately 391 hours in allocation meetings and countless more hours reading grant proposals. At the end of their work, they recommended nearly \$1 million in new grants for services delivered through 30 programs at 26 partner agencies

appropriate infrastructure

to receive support. 48 agen-

cies in our community are

listed as "United Way cer-

tified". You can view a full

list by visiting our website:

www.UWHeartMO.org.

Requests for funding are staggered by year for each community impact area. Funding for approved agencies is dispensed in threeyear intervals for Education, Health and Financial Stability (Income) programs, and in two-year intervals for Basic Needs programs. Under this timeline in 2018, United Way approved new grants in Education and Basic Needs.

Once certification has been established, an agency can apply for a United Way grant. The applications process for United Way, along with the City of Columbia and Boone County, is based on a joint online grant application that all agencies must use. The purpose in sharing this system is threefold: it prevents duplication in applying for funding from United Way, the City and County, provides opportunities for collaboration among these three entities and establishes consistency by requiring every agency to use a common taxonomy of services for describing their program proposal and de-

sired outcomes. Once the application is submitted, United Way engages a group of volunteers that make up an Advisory

means that we strive for diversity in race, gender and socio-economic status.

The task this past year for our Advisory Councils was to review 39 new proposals in Education and Basic Needs totaling \$2.46 million. From January through April, these 35 community volunteers spent approximately 391 hours in allocation meetings and countless more hours reading grant proposals. At the end of their work, they recommended nearly \$1 million in new grants for services delivered through 31 programs at 25 partner agencies. Building on our existing Health and Financial Stability, Education and Basic Needs grants, that brought United Ways grant portfolio total to 45 programs delivered by 33 local agencies.

So how did the volunteers make these elaborate and difficult decisions? All told, this process of awarding grants takes a qualitative and quantitative view. Volunteers considered all

Our community, our campaign

or seventy-two years, the Heart of Missouri United Way campaign has been an annual community effort focused on raising funds to distribute to local not for profit agencies providing health and human services to local people in need. Once called the Community Chest, the campaign began as a grass roots effort by local volunteers who had a desire to help. These volunteers began to raise raising funds to support the work of agencies, so their primary focus could be on providing the services to children, families and individuals. The first-year campaign raised \$25,784. Since this time, the community has come together to raise more than the previous year 65 out of the 71 years!

Today, Heart of Missouri United Way funds 45 programs within 33 local not for profit agencies in Boone, Cooper, and Howard counties. In 2017 local United Way funding provided services for more than 50,000 unduplicated individuals. The programs funded are strategically positioned to address individual and community challenges in the areas of education, financial stability, health, and basic needs. Last year the local United Way campaign raised \$2,962,310 to support the work of these agencies through the Community Impact model. United Way receives no funding from any governmental organization, all funds raised are from companies and local individuals.

Annually, more than 700 volunteers serve in various campaign roles. This year the community campaign is chaired by Jim & Lisa Meyer of MeyerWorks, LLC, Troy Norton of Williams-Keepers, LLC serves as the vice-chair. More than 225 local organizations run employee campaigns, and an additional 40 organizations provide

a corporate gift. Last year more than 8,000 individuals made a pledge/gift to the Heart of Missouri United Way. More than 58% of all pledges/gifts are made by employees via the opportunity to give through their company's United Way campaign, of which 85% choose to make their gifts via payroll deduction. The rest of the funds are via corporate gifts from companies who have a local presence (30%), and individuals such as retirees, physicians, dentists, attorneys (12%).

The University of Missouri has been a significant partner for more than 50 years, not only raising funds for United Way, but also providing program expertise, data, and strategic analysis. Last year the employees of the university pledged more than \$512,000, making them the top donor group. The 2018 Mizzou United Way campaign will kickoff on September 25 and is chaired by Colleen Lamond from the Intercollegiate Athletics department, while Matt Waterman from University Health serves as the vice-chair. University of Missouri employees donate more to their local United Way than any other school in the SEC. M-I-Z!

To assist with the campaign, seven local companies (Central Bank of Boone County, Columbia Insurance Group, Commerce Bank, Landmark Bank, Providence Bank, Shelter Insurance and Veterans United Home Loans) have loaned an executive for a five-week period of time during the months of September and October. The Loaned Executives to assist companies in running their employee campaigns and meet with CEO's to encourage their companies to run first-time campaigns or provide a corporate gift. If your company would like to learn more about the work of United Way, the Loaned Executive program, or discuss supporting United Way via an employee campaign or corporate gift, please contact me at dholtgraewe@ uwheartmo.org.

United Way employee campaigns are designed to be fun, informative events that provide a great opportunity to further build your company's team atmosphere, inform employees of community needs, and support your company's philanthropic mission.

For the fifth year, Veterans United Foundation has made a community challenge, in which they will make a \$250 gift to Heart of Missouri United Way for anv individual or couple who pledges \$1,000 or more to Heart of Missouri United Way during the 2018 campaign, up to a community total of \$150,000. If you would like to more about this opportunity or wish to make a pledge at this level, please contact Amy Sajko



DAVID HOLTGRAEWE CAMPAIGN DIRECTOR

HEART OF MISSOURI UNITED WAY

asajko@uwheartmo.org.

Mid-Missouri is a wonderful place to live and raise our families! And through collective generosity, donors to Heart of Missouri United Way are helping to remove barriers that are inhibiting some of our neighbors from reaching their full potential, the ability to prosper, and to enjoy all that mid-Missouri has to offer.

The Heart of Missouri United Way fights

Text "LiveUnited" to 91999 to give a donation.

VISION

Our community wins by Living United: By responding to changing community needs. By forging strategic partnerships and fostering effective solutions to tackle local issues. By harnessing the best resources and inspiring others to join the fight in defeating barriers to basic needs, health, education and financial stability.

VALUE STATEMENT

Heart of Missouri United Way

- Secures community dollars
- Raises awareness of community issues
- Builds organizational capacity for the nonprofit sector

Notes from the 2018 Campaign Chair



Dr. Eryca Neville encourages attendees to invest in the community by investing in Heart of Missouri United Way.

welcome this opportunity to express what my involvement with the Heart of Missouri United Way 2018 Community Campaign has meant to Lisa and me personally. I'd also like to take this opportunity to address the great task we face - disrupting the cycle of generational poverty in our community and the process we use to raise funds and allocate them for this effort. And finally, I'll discuss our fundraising goal for this year's campaign, and what steps we have already

For me, the Heart of Missouri United Way epitomizes one of the key characteristics that makes our country and our community special. Foreign visitors have long noted the way that Americans come together to form voluntary associations to help our neighbors and to solve problems in our local communities. This voluntary, cooperative spirit takes many forms: volunteer fire departments, service clubs, charitable organizations, etc. Another hat I wear is that of a reserve military officer. In that capacity, I have

visited many places in the world where the cooperative spirit in society is not nearly as strong as what we have here. These international experiences lead me to an even deeper appreciation of the role of the Heart of Missouri United Way and our partner organizations. They are custodians of our finest traditions of voluntary action in service to our neighbors. This is truly a fine organi-

zation made up of motivated and dedicated individuals focused on the overarching goal of assisting our fellow citizens to escape from generational poverty. The Heart of Missouri United Way and its partner agencies do great work, but there is much work to do. Did you know that Boone County ranks among the lowest of all counties in the state and country in terms of an individual's likelihood of escaping poverty? To address this challenge, our local United Way invests nearly 2 million dollars annually to create generational change and stop the cycle of poverty through Impact Grant Funding in the areas of Basic Needs, Education, Financial Stability and Health. This is our Community Impact Model and it is truly creating a positive difference for our friends and neighbors who are struggling to move themselves forward.

To achieve the results that we all want, we need the entire community to engage with us, and that is happening. I am pleased to announce that this year we expect 225 organizations to run internal campaigns, and 40 companies to make corporate gifts. In addition, we have many generous, unaffiliated individual donors. Our goal for the community campaign this year is to

raise \$3,062,000 and with your continued support, I am confident that we can surpass this amount. In fact, I am pleased to announce that we have already raised approximately \$1,209,066 to date.

Participating in this effort this year and for the past couple of years has been very rewarding for Lisa and me. We have both been extremely impressed with the careful, thoughtful and objective process that the Heart of Missouri United Way board goes through when making decisions to support partner organizations and their programs. I can tell you that this organization and its staff are outstanding stewards of the resources that you entrust to them, and that the Community Impact Model is making a real difference.

To our donors - you and your organizations are truly



JIM MEYER

COMMUNITY CAMPAIGN CHAIR

making a difference. But the need is great, and it will take all of us working together to assist our neighbors as they struggle to escape generational poverty. We have an extremely effective process for allocating your generous donations where they can do the most good. Our efforts are worthy of your continued support. Working together, I am confident that we can surpass our goal of raising \$3,062,000 for these very effective programs and greatly reduce the scourge of generational poverty in our community. We already have a significant head start, but there is much more to be done. Let's go out and make Boone County and Central Missouri into an oasis where people have a much greater than average chance of escaping generational poverty. With all of us working together, we can



Loaned Executive Christy Ford welcoming attendees to the Heart of Missouri United Way Community Campaign Kickoff.



A valuable experience: Reflections of a Loaned Executive

fter my experience over the last several weeks volunteering for the United Way, I can't believe there was ever a time that I was unsure about the work United Way does. or the impact they have on the community. However, a few months ago I had never heard the term "Loaned Executive," and had only heard peripherally about the United Way. I knew the United Way was a charity a lot of people supported, but I had my own charities and own causes that I was passionate about, specifically surrounding people in poverty and children in crisis. I didn't think of the United Way as an organization that could efficiently help further the causes I care about.

about being Veterans United's representative as a Loaned Executive for the United Way, I was skeptical at first. In fact, I asked for a few days before making a decision, because I wanted to do more research on the organization and make sure it was a cause that I could get behind and be passionate about. Those who know me know I do not do things half-heartedly, and if I was going to volunteer for a cause I wanted to be sure it was something I believe in. After reading more about the organization and realizing how focused they were on helping those in need in our community, I think I was a little surprised I hadn't heard more about it before. I agreed to be a Loaned Executive because I thought it

would be a great opportunity to meet some new people, form new relationships, and

help those in need. Fast forward to being almost done with my service as a Loaned Executive - it is difficult to put into words what an incredible and humbling experience this has been. Sometimes it is easy to see the need and want to help, but hard to know the best way to get involved. Sometimes it is hard to even know what help is available for people. I now have a better answer to the question "What help is available?" thanks to my experience as a Loaned Executive with the United Way. One of the first things I remember hearing during the training for Loaned Executives was the statement "when peo-

ple are experiencing need, they usually don't just need one thing. They typically don't just need food, they may also need a place to stay, they may need childcare, or maybe help finding a job. The United Way agencies work together to help people in need get the help they need to move forward." While that statement seems obvious to me now, I think too often I thought of services in a vacuum and didn't realize how much the organizations in this community work together to help meet the needs of those are experiencing poverty in our community. There isn't really one agency out there that can meet all the needs of everyone experiencing poverty, but together the agencies can provide assistance depending on what a person needs. Job Point can help with job skills for someone who may need work, Love INC can help a personal with financial skills and literacy, True North can assist a woman who needs to escape an abusive relationship, and Family Health Center can help someone who may be uninsured or underinsured and does not have another health care provider. And there are many other great agencies out there who all work together to serve the common goal - helping those in poverty in our community. And the United Way is there to support these agencies by helping fund programs that are vital to aiding those in poverty in our community. I remember during training



WENDY **S**HOEMYER LOANED EXECUTIVE VETERANS UNITED HOME LOANS

someone who previously served as a Loaned Executive said it cost him money to be a Loaned Executive, because now he donates to the United Way all the time because he knows how vital the work they do is. I now completely understand that sentiment, because the United Way also has made a supporter out of me.









GET INVOLVED. LIVE UNITED.®

Learn more about how you can get involved at our website: www.UWHeartMO.org or call our office at (573) 443-4523





For 20 years, Boone Hospital Center has hosted the Pacesetters Breakfast with the Heart of Missouri United Way to recognize and thank the organizations leading the way in our community. Thank you, to the 2018 Pacesetter organizations.

American Outdoor Brands BMW of Columbia Bob McCosh Chevrolet Buick GMC Boone County Family Resources Boone Hospital Center Caterpillar Central Bank of Boone County City of Columbia Columbia Honda Columbia Housing Authority Columbia Insurance Group Commerce Bank Family Health Center First Chance for Children First State Community Bank Grade A Plus Inc. Harrisburg Early Learning Center

Harrisburg Early Learning Center
Hawthorn Bank
Heart of Missouri CASA
Heart of Missouri United Way

Job Point

Landmark Bank

Lutheran Family & Children's Services

Mary Lee Johnston Community Learning
Center

Mercedes-Benz of Columbia
Mid-Missouri Legal Services
Miller's Professional Imaging

Missouri Employers Mutual
Providence Bank
RUSK Rehabilitation Center
Schnucks
Services for Independent Living

Simon Oswald Architecture
The Bank of Missouri
The Callaway Bank

The Food Bank for Central & Northeast Missouri

The Salvation Army

UPS

US Bank

Veterans United Foundation

Voluntary Action Center

Watlow Columbia

Williams-Keepers LLC

Woodruff

Zimmer Radio & Marketing Group

This message is made possible through the support of





Heart of Missouri United Way

OCTOBER, 2018



2018 HEART OF MISSOURI UNITED WAY LOANED EXECUTIVES



STARTER GROUP

J. R. SMITH
SHELTER INSURANCE COMPANIES

CHRISTY FORD
SHELTER INSURANCE - RETIRED

WENDY SHOEMYER
VETERANS UNITED HOME LOANS

RYAN ODNEAL

<u>CLOSER GROUP</u>

DENISE WELCH
COLUMBIA INSURANCE GROUP

BRIAN MYERS
PROVIDENCE BANK

LAURA ESTES

Landmark Bank

MARISSA BACON CENTRAL BANK OF BOONE COUNTY







LIVE UNITED

2018 Funded Agencies

Community Impact: Education - Health - Financial Stability -Basic Needs

BIG BROTHERS BIG SISTERS OF CENTRAL MISSOURI
BOONSLICK HEARTLAND YMCA — COOPER COUNTY
BOYS & GIRLS CLUBS OF THE COLUMBIA AREA
CENTRAL MISSOURI FOSTER CARE AND ADOPTION ASSOCIATION

CITY OF REFUGE

COLUMBIA CENTER FOR URBAN AGRICULTURE
COLUMBIA HOUSING AUTHORITY LOW-INCOME SERVICES
FAMILY COUNSELING CENTER OF MISSOURI INC.

FAMILY HEALTH CENTER
FIRST CHANCE FOR CHILDREN
FUN CITY YOUTH ACADEMY
GRADE A PLUS, INC.
GREAT CIRCLE

HARRISBURG EARLY LEARNING CENTER
HARVEST HOUSE — COOPER COUNTY
HEART OF MISSOURI CASA
JABBERWOCKY STUDIOS

JOB POINT

LOVE INC

LUTHERAN FAMILY & CHILDREN'S SERVICES

MARY LEE JOHNSTON COMMUNITY LEARNING CENTER

MID-MISSOURI LEGAL SERVICES CORP.

NORA STEWART EARLY LEARNING CENTER

DHOENIX HEALTH PROCESSAMS

PHOENIX HEALTH PROGRAMS

RAINBOW HOUSE

SERVICES FOR INDEPENDENT LIVING (SIL)

THE FOOD BANK FOR CENTRAL & NORTHEAST MISSOURI

THE SALVATION ARMY

TRUE NORTH

TURNING POINT

UNITED COMMUNITY BUILDERS

UNLIMITED OPPORTUNITIES INC. — COOPER COUNTY

VOLUNTARY ACTION CENTER

Text "LiveUnited" to 91999 to give a donation.