

UNITED WE FIGHT UNITED WE WIN

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Heart of Missouri United Way

www.uwheartmo.org

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Committed volunteers help make allocations decisions

I 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 everyone 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 future.

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 recommendations. These volunteers are members of the community, which may consist of subject matter experts, business professionals, 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

information gleaned during agency presentations, site 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 access (Will members of our community in need be able to utilize the proposed services?)
- Capability to deliver program proposed (Does the agency have the ability and capacity to execute 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-



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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

Requests for funding are staggered by year for each community impact area. Funding for approved agencies is dispensed in three-year 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.

appropriate infrastructure to receive support. 48 agencies in our community are listed as “United Way certified”. You can view a full list by visiting our website: www.UWHeartMO.org.

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 desired 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

For 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 kick-off 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 Ex-

ecutive 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 any 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

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HEART OF MISSOURI UNITED WAY

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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.

MISSION

The Heart of Missouri United Way fights to improve lives in our community.

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



UNITED WE WIN.

LIVE UNITED.®

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
 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
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Heart of Missouri United Way

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
COMMERCE BANK

CLOSER GROUP

- DENISE WELCH
COLUMBIA INSURANCE GROUP
- BRIAN MYERS
PROVIDENCE BANK
- LAURA ESTES
LANDMARK BANK
- MARISSA BACON
CENTRAL BANK OF BOONE COUNTY



Heart of Missouri United Way

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
- 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.