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United Way
of the Mid-South

ANNUAL REPORT
July 1, 2020 — June 30, 2021

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*In the midst of every
crisis, lies great
opportunity.
— Albert Einstein*



LETTER FROM THE BOARD CHAIR

JEAN M. MORTON

Suntrust Bank

Board Chair, United Way of the Mid-South

The United Way of the Mid-South experienced a challenging, yet rewarding year. While the pandemic continued to plague our community, more and more of our community families were in need of assistance. The United Way of the Mid-South saw and heard the need and assisted in two unique ways. First of all, we communicated the increasing need and YOU, our donors – both corporate and personal, stepped up so generously going above and beyond to meet this ask for additional donations. Thank You! Secondly, as the Federal Government granted additional resources to the local not-for-profits helping our families, the United Way of the Mid-South was asked to partner to distribute these needed resources. The United Way team took in the applications and assisted in the timely distribution of funds so our families could benefit from these resources in their time of need. Thank you team and the United Way agencies for a job well done!

And let's not forget the Annual Corporate Campaigns. Amidst the ever-changing working environments in our corporate partners and the uncertain economic matters in our community, nationally, and worldwide, our corporate partners were unwavering in their commitments to the United Way of the Mid-South. They rallied their organizations virtually with robust and creative initiatives to spur strong annual campaign results. As Dr. Robinson would say "SHAZAM!" and "Always remember, where there is a YOU, there is a way!"

Thank you, Mid-South, for demonstrating community pride and abounding generosity when so many of our local neighbors and families were in need. I am very proud to be a part of this community and the United Way of the Mid-South. Thank you for all you do every day!

Sincerely, 

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LETTER FROM THE PRESIDENT & CEO

REV. KENNETH S. ROBINSON, M.D.

President and CEO, United Way of the Mid-South

My United Way Family,

There are so many adjectives which are applicable to this 2020-2021 year upon which we reflect and report herein; unprecedented, unpredictable, disruptive... and for so many in our community – devastating. But because of United Way of the Mid-South and, more accurately, the unselfish, extraordinary support and engagement extended toward this United Way by you - our corporate partners, individual donors, service providers and many agency partners and collaborators - there are other adjectives which also apply, particularly for those whose lives have been touched this year by this United Way. Even in the midst of this persistent pandemic, these individuals and families are grateful, hopeful, resilient, fulfilled, encouraged, relieved. During these turbulent times - more than ever - your United Way has been at the crux of our community's coming together "to address priority needs" -- in a united way!

*Your United Way hasn't just survived the impact of the pandemic upon us. In several ways, we've actually thrived in this environment. Our mission "to improve the quality of life of Mid-Southerners" has never been more relevant. Our value has never been more evident; as a sector integrator, a collective impact network provider, a grant-maker and grant administrator, and even as a dream-restorer for literally the thousands of individuals who, often for the first time ever, sought out **Driving The Dream**, our Free Tax Prep program and the multitude of high-quality services of our partner agencies. Our visibility has never been more elevated; as we stepped into the forefront of efforts to "save our nonprofits" and to facilitate \$26 million in federal relief funds to nearly 100 nonprofits in our service area and throughout West Tennessee. Our viability has never been more secure; as we've continued to build upon our solid workplace resource development base to significantly diversify our funding sources through grants, contracts, and with a posterity-sustaining, \$5 million gift from the Plough Foundation for our Endowment Fund.*

Like many front-line nonprofits whose donors simply found themselves also in uncharted economic waters and were challenged to maintain their customary charitable contributions, we also tightened our belt. While we continued temporary reductions in salaries and other personnel and operational expenses into this fiscal year, I'm truly grateful to report that we never had to invoke a reduction in our workforce. How critical that was, because our exceptional executives, finance and administration, program and resource development, marketing and communications, and IT staff stepped up to do simply extraordinary work under extraordinary, virtual working conditions! Please join me in thanking them, along with all the hard-working staff at the scores of nonprofits your donations helped fund, who have similarly stepped up and stepped out to serve during an ongoing tsunami of need.

I trust that what's demonstrated in the narrative of this 2020-2021 Annual Report and the stories that are shared, is that giving to United Way of The Mid-South and engaging in the work that we do is not simply transactional. Your investment is literally transformational for our community and for thousands of your neighbors!

Thank you!

A handwritten signature in blue ink, appearing to read "Kenneth S. Robinson", written over a light blue horizontal line.

COMMUNITY IMPACT OVERVIEW

United Way of the Mid-South leveraged our resources to address both immediate needs and long-term goals for local nonprofit agencies. Because of our understanding of local needs, we were able to quickly mobilize funds and innovate our delivery systems to provide effective responses. United Way of the Mid-South's Community Impact platform provides an "opportunity for all" to advance toward economic self-sufficiency. We enrich the lives of Mid-Southerners through our Community Impact Fund, Free Tax Prep program and **Driving The Dream**. The Mid-South is engaged in our work by volunteering, donating funds, and supporting community causes.

21.7%

of people
in the City of Memphis
live in poverty

16.8%

of people
in Shelby County live
in poverty

15.4%

of people
in our AR, MS, TN metro
area live in poverty

*PRE-PANDEMIC
STATISTICS

The US National percentage of people living in poverty for 2020 was 11.4%. From the 2019 update of the Memphis Poverty Fact Sheet, produced annually by Dr. Elena Delavega of the School of Social Work at the University of Memphis. Data from the 2019 American Community Survey released in September 2019. *Statistics DO NOT reflect the impact of COVID.

COVID RESPONSE & IMPACT

UWMS serves the Greater Memphis community, an area with widespread poverty and great service needs. An estimated **53.5%** of the Memphis population live in poverty and are struggling to make ends meet. The loss of one paycheck often creates a financial crisis for this population. This economic vulnerability is not limited to the urban core, the economic need is high in all of the eight counties UWMS serves; especially in Lauderdale County, TN and Tunica County, MS, where 53% and 56% of families, respectively, are in poverty or are financially at risk.

Recognizing that the potential economic impact of the COVID-19 pandemic would be devastating for these struggling families and would increase needs for basic services, UWMS established the COVID-19 Economic Relief Fund.

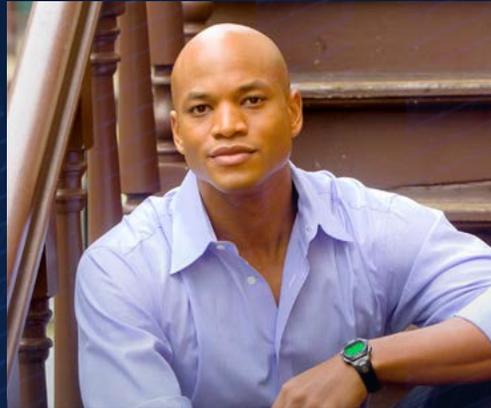
During the 2020-2021 reporting year, **\$156,124** in grants were provided to **11** nonprofit partners. These grants followed the \$552,885 in investments made from this fund last year. In addition **\$68,000** in Kroger gift cards were distributed through faith community partners.

COVID Economic Relief funds were also used to establish a **Relief Call Center** at United Way. Call Center staff gathered and maintained updated information on the availability of community services and responded to **5,723** inquiries for assistance through June 2021, connecting callers to the services they needed.

United Way of the Mid-South was selected by the Tennessee Department of Human Services to serve as one of six **Grant Administrators for the Tennessee Community CARES Program**, to support and assist area nonprofits with securing reimbursements for expenses spent to aid our community during the COVID-19 pandemic. Our United Way agreed to expand the reach of our capacity to also administer these funds to the 10 counties traditionally served by United Way of West Tennessee. United Way of the Mid-South was assigned over **230** applications to review, provide technical assistance and advice to the applicants, and make final recommendations to the Department of Human Services. Due to the overwhelming number of requests, the State was able to award **\$150 million to 656 nonprofits** across the state. Of those, United Way of the Mid-South was next assigned 98 nonprofits, to help facilitate a potential total of **\$26.3 million** of reimbursement funds to agencies that have been on the forefront of responding to the COVID-19 pandemic.

#UWSAVEOURNONPROFITS CAMPAIGN was the umbrella, virtual campaign designed to boost awareness for United Way of the Mid-South and to raise funds for our COVID-19 Economic Relief Fund. Its purpose was two-fold: to raise the visibility and demonstrate the value of our COVID-19 Economic Relief Fund (ERF) and Relief Call Center in traditional and social media, and to generate additional donations for Mid-South nonprofits which were performing essential services during the pandemic.

This year, United Way of the Mid-South developed a comprehensive marketing strategy that included outreach, production technology and donor cultivation. Our **Community Impact Town Hall** marked our first live, virtual event during the COVID-19 pandemic. For the first time, United Way of the Mid-South utilized Global NewsWire to garner mentions in 83 articles nationwide representing a potential reach of 131 million people. Bestselling author, combat veteran and former CEO of Robin Hood, Wes Moore, addressed the racial wealth gap, and acknowledged how solutions like *Driving The Dream* can create economic opportunity for all in our communities.



As United Way of the Mid-South began our third quarter of the fiscal year, our leadership group, Women United, ramped up their advocacy efforts by hosting “**Candid Conversations: COVID-19 Vaccinations.**” This event offered our community honest and frank interactions and feedback about the virus and the vaccine facilitated by an on-line survey and questions submitted to the assembled panel of national and local health professionals, and elevated their role as a leading advocacy group. From securing sponsorships and panelists to event logistics, Women United played a key role in ensuring Mid-Southerners received important information about the virus, the vaccine and its distribution in our community. “Candid Conversations” allowed United Way to imagine and implement new ways to reach our target audiences, as well as new audiences; by offering this free virtual event, hosted by Hope Presbyterian Church, by collaborating with Local24 Memphis to rebroadcast the conversation to their Local24 Memphis and CW30 viewing audiences, and by utilizing our e-newsletter platform, our website and our social media channels to encourage participation and to gain additional traction in our owned digital space.



EDEN was in peril soon after the Coronavirus outbreak due to losing her job as a waitress. Her income came to a complete stop. She still had to care for two children and an elderly mother. After tirelessly searching for agencies that provided food, Eden discovered the DTD Care Coordination Hub at Memphis Catholic Charities. Her encounter with *Driving The Dream* (DTD) care coordination started with an appointment to pick up a food box. The DTD Care Coordinator was able to provide access to a local food distribution site and made Eden aware of the many resources available through the *Driving The Dream* care coordination network. The DTD Care Coordinator connected Eden with employment opportunities, rental and utility assistance support. A DTD Care Coordinator followed up with Eden to ensure she followed the outlined plan they created to achieve her goals.

“As the Christmas holiday came, my care coordinator made sure my children received the most amazing Christmas gifts. From job assistance to utility assistance to rent assistance and Christmas gifts, having a Driving The Dream care coordinator was an absolute blessing.” — Eden

COMMUNITY IMPACT FUND



United Way of the Mid-South has been a true partner to local nonprofits since our inception, initially raising \$450,000 to support social services agencies in 1923, to now raising more than \$850 million cumulatively to make a meaningful difference for our most vulnerable neighbors. Traditionally, Community Impact Fund grants are United Way's largest and most familiar community investments; and in the midst of the pandemic, these grants continue to support critical programs of essential nonprofit agencies. During this time, we have become increasingly laser-focused in our areas of Community Impact Fund grant-making. We have moved from a broader base of support to aligning all investments with the following categories--childhood success, youth success, economic mobility, and access to health--amplifying the dollars given by donors into real outcomes in the community.

COMMUNITY IMPACT

CHILDHOOD SUCCESS

Children from birth to eight years old enter school ready and are successful in primary school.

87%

KINDERGARTEN PROFICIENCY

2,448

PARTICIPATED IN HIGH QUALITY EARLY CHILDHOOD PROGRAMS

94%

CHILDREN MAINTAINED OR IMPROVED SCHOOL ATTENDANCE

YOUTH SUCCESS

Youth from middle school years through young adulthood gain the knowledge, skills and credentials to obtain family-sustaining employment.

94%

YOUTH EARNED PASSING GRADES

36,466

YOUTH PARTICIPATED IN OUT OF SCHOOL TIME PROGRAMS

93%

SENIORS GRADUATED ON TIME

ECONOMIC MOBILITY

Individuals/Families improve their socioeconomic status.

84%

FAMILIES MAINTAINED STABLE HOUSING

3,393

INDIVIDUALS RECEIVED JOB SKILLS TRAINING

75%

INDIVIDUALS INCREASED DISPOSABLE INCOME

ACCESS TO HEALTH

Individuals/Families have access to healthcare and improve their health outcomes.

93%

BABIES HAD HEALTHY BIRTH OUTCOMES

14,595

INDIVIDUALS PARTICIPATED IN PHYSICAL ACTIVITY AND / OR HEALTHY FOOD ACCESS / NUTRITION PROGRAMS

86%

INDIVIDUALS ADOPTED HEALTHIER BEHAVIORS

In our continued quest to support economic advancement and opportunity for all, we are uniquely positioned to rally support for local nonprofit agencies struggling to maintain the same level of services during the pandemic. Because of our understanding of local needs, United Way of the Mid-South leveraged our resources to address both the immediate needs and the long-term goals for these agencies. We were able to quickly mobilize funds and innovate our delivery systems to provide effective responses.

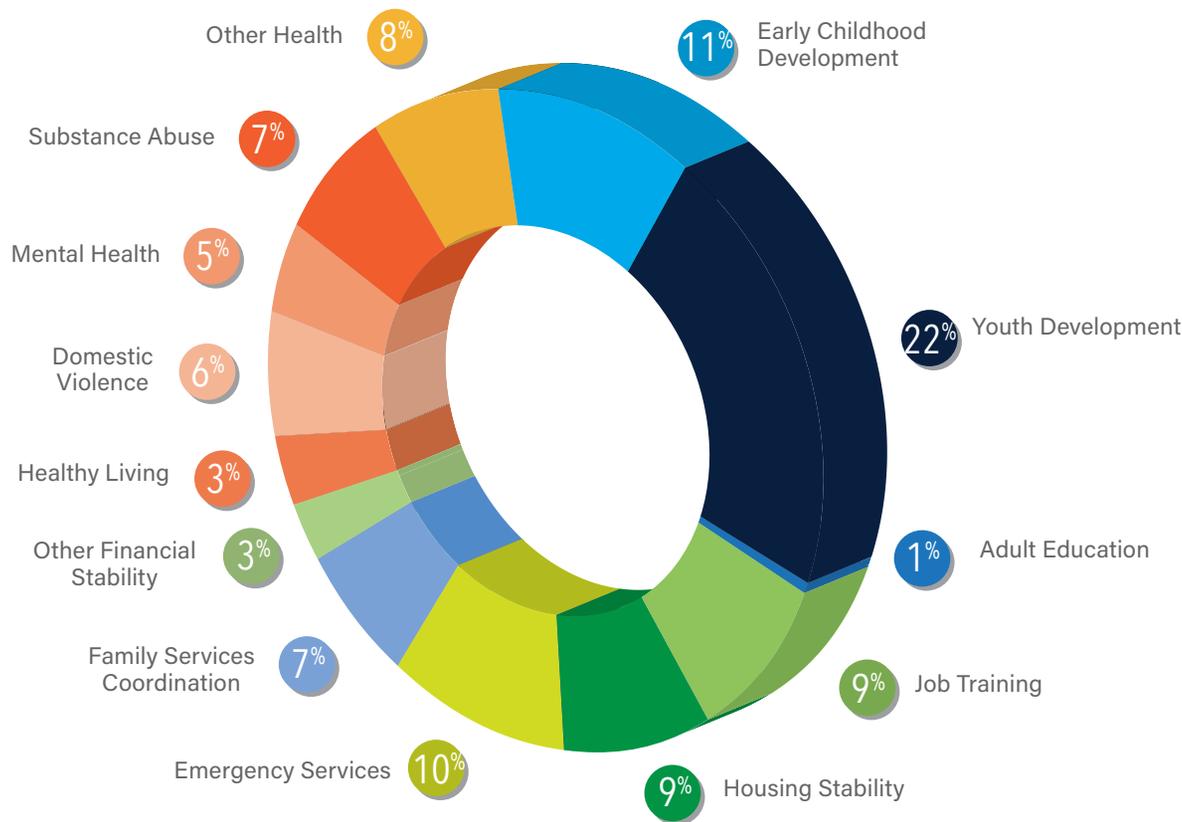
Economic disparity and generational poverty in the Mid-South remain key obstacles for individuals and families as they advance from poverty to prosperity. Our investments promote economic justice and demonstrate our commitment to supporting our neighbors in need.



Scan to view our [Partner Agency list](#).

2020-2021 COMMUNITY IMPACT FUND INVESTMENTS

United Way of the Mid-South provides financial support to diverse programs working in concert to advance social and economic mobility in the Mid-South.



COMMUNITY PARTNERS

UWMS provides financial support of nonprofit services within the UWMS eight-county service area comprised of Fayette, Lauderdale, Shelby and Tipton Counties in Tennessee; DeSoto, Tate and Tunica Counties in Mississippi; and Crittenden County, Arkansas. In addition, through county specific designations. UWMS also administers grants in Marshall County, Mississippi.

United Way of the Mid-South provided operational support to a total of **82** nonprofit, community-based agencies including **71** United Way Agencies which received grants through the Community Impact Fund. Of the total persons served in programs funded through Community Impact grants, a reported **96%** were from low-to-moderate income households.

GRANTS ADMINISTERED BY UNITED WAY 2020-2021

United Way is perhaps most known for the funds distributed from our Community Impact Fund. However, United Way also invests in community partners through these additional sources of funding:



Scan to view our [Additional Grantees.](#)



UNITED WAY OF THE MID-SOUTH

DRIVING THE DREAM

Our United Way envisions a Mid-South in which all people have equitable access to resources and supports needed to achieve their hopes and dreams by fostering a community where the people we serve are hopeful, resilient and self-sufficient. *Driving The Dream (DTD)* is our United Way's solution to the systemic challenge of generational poverty. It is a network of coordinated, effective nonprofit social services agencies that connects low-income families to the services and resources they need in the areas of health and well-being, social capital, economic stability and education.

Driving The Dream is a resilient human services ecosystem that aligns and integrates the local service delivery system to support families living in poverty. *DTD* is based upon an emerging national standard of care, informed by research-based practice, designed to address and alleviate conditions of poverty. This model prioritizes a multi-generational approach to advancing holistic wellbeing. *DTD* boosts the power of our social and economic support systems, working closely with communities whose connections to these resources have become frayed over time, equipping our partners with the tools and resources necessary to bring about positive change in the social services culture and practice.

Through the CaseWorthy platform, United Way of the Mid-South is connecting the dots among more than 80 supportive service agencies with a goal to break the cycle of generational poverty for individuals and families, and to create pathways to financial stability and economic security. Our collective goal is to help families move towards a future of their choosing.

In response to the emerging need for access to supportive services during the pandemic, *DTD* launched the Relief Call Center in April 2020 to provide direct access for the public into *Driving The Dream*. Since the date of its launch, the *DTD* Relief Call Center has managed nearly 6,000 unduplicated requests from individuals in our community seeking services, often for the very first time. The top five requests have been for shelter/housing, credit/financial management, income, food and nutrition, and employment. United Way's Relief Call Center powered by *Driving The Dream* can put callers in contact with multiple agencies without individuals having to repeat the circumstances for their needs.

2,604

FOR THE 2020-2021 REPORTING YEAR

CONNECTIONS to AGENCIES

DTD HAS LEVERAGED THE CASEWORTHY DATA PLATFORM TO SUPPORT COLLABORATION AND PROMOTE BIDIRECTIONAL DATA SHARING AMONG OVER 800 USERS OF CASEWORTHY.

Four years ago, *DTD* pioneered an interagency, shared data platform to facilitate conveying information about service recipients - with their consent - and to seamlessly make and track referrals to multiple agencies on their behalf. Now using CaseWorthy, our *Driving The Dream* partners receive an improved user experience as well as the ability to collect richer and more actionable data from the network.



\$3.23 MILLION GRANT



RECEIVED \$416,000

Year 2 of a 3-year \$624,000 grant



RECEIVED \$100,000

Workforce development and *Driving The Dream* expansion



An Anthem Company

RECEIVED \$25,000

Digitizing training materials



IN PARTNERSHIP

For emergency rental and utility assistance

BY CONNECTING THE DOTS AMONG SUPPORTIVE SERVICE AGENCIES, DTD IS MOVING PEOPLE FROM WHERE THEY ARE TO WHERE THEY DREAM TO BE.

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Between January 1, 2018, and June 30, 2021, *DTD* formalized partnerships with **79** organizations in Shelby County; nonprofit human services agencies, health care payors, health care providers, schools and government agencies, including **24** United Way of the Mid-South Partner Agencies. These partnerships, built upon an electronic shared-data platform, have documented the following (updated to release of this report):

DTD WORKS WITH 85 ORGANIZATIONS PROVIDING 160 DIFFERENT SERVICES.

7,547 TOTAL REFERRALS

5,027 HOUSEHOLDS SERVED

8,639 FAMILY MEMBERS IMPACTED

13,254 PARTICIPANT INTERACTIONS THROUGH DRIVING THE DREAM CARE COORDINATION

DTD IS TOUCHING THOUSANDS OF MEMPHIANS AND TRANSFORMING LIVES.

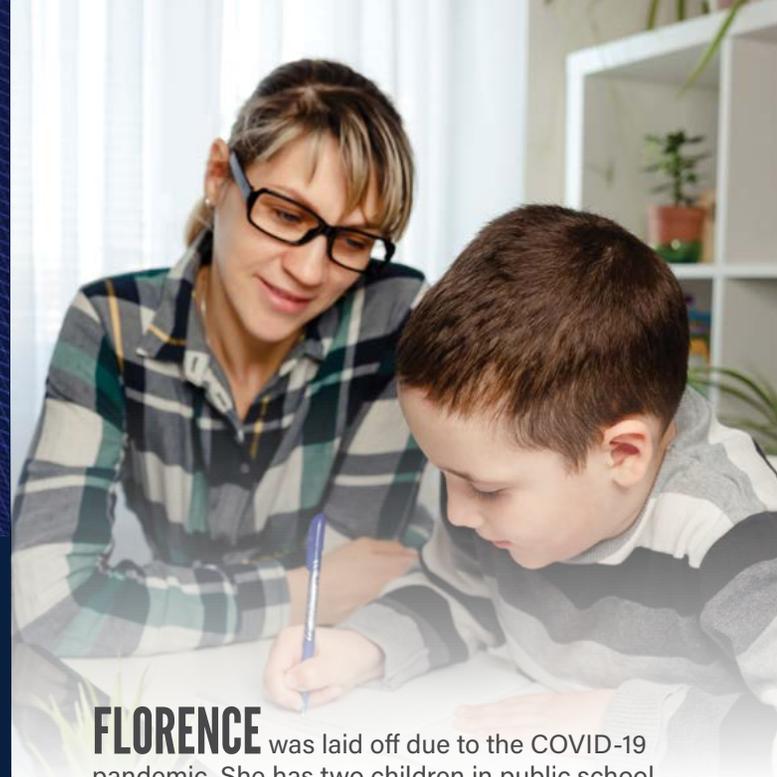
43% HAD MORE STABLE EMPLOYMENT

44% HAD BETTER FINANCIAL MANAGEMENT STRATEGIES

63% REPORTED HIGHER INCOME



Scan to view our [DTD Partner list](#).



FLORENCE was laid off due to the COVID-19 pandemic. She has two children in public school and was struggling to balance supporting their virtual learning and searching for a job. She has never needed assistance in the past and did not know how to begin navigating the system. However, through a community program that one of her children was participating in, she was connected to *Driving The Dream* and began working with a Care Coordinator at Communities In Schools. Florence reports being contacted immediately. She was asked about her family's needs and was offered several resources to help with housing, community engagement, and nutrition. She states that the Care Coordinator was extremely knowledgeable about local resources and was able to explain the process to her clearly in a way that wasn't overwhelming. She plans on continuing to communicate with her Care Coordinator throughout her children's time in school and is thankful for the personal attention and support she was provided during an uncertain time in her family's life.

— Partner Agency

FREE TAX PREP



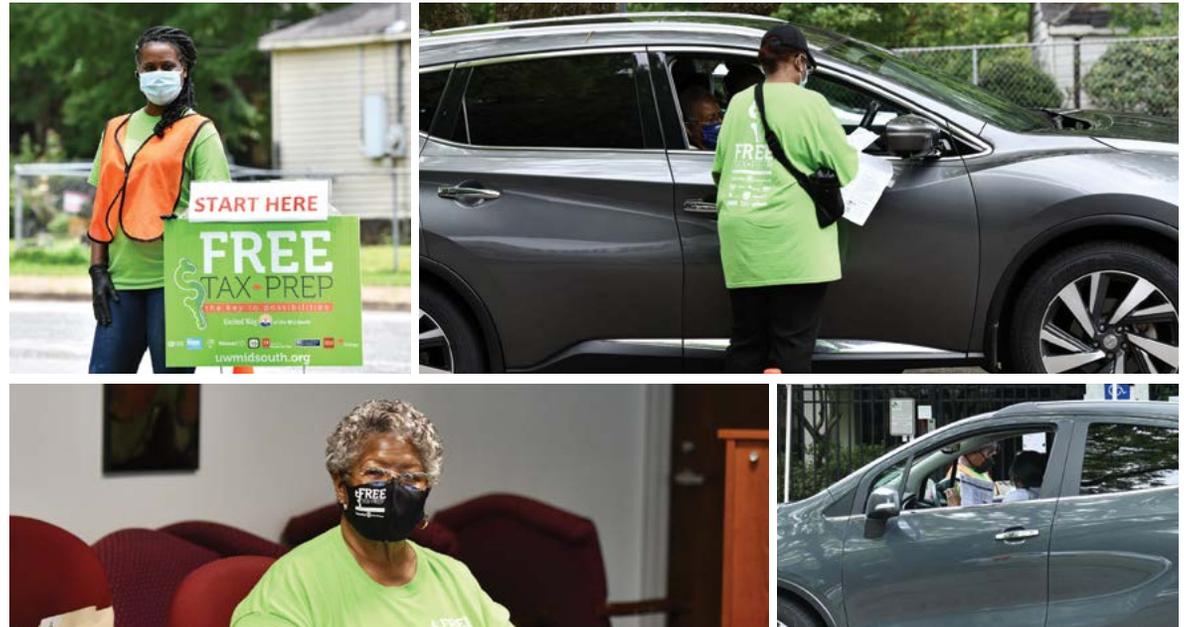
The Free Tax Prep program (FTP) is our direct service outreach to our 8-county area, for the second tax season providing no-cost tax preparation in COVID-safe environments. FTP fosters financial stability and economic mobility for the taxpayers we serve, and supports the local economy - saving low-to-moderate income workers unnecessary fees and facilitating for them significant tax refunds and credits.

"The free tax prep services not only help me to file, but the services also help preparers stay mobile and share-minded. I love watching them stay focused on the tasks it takes to help others."

— Happy Customer

For the second tax year since the beginning of the COVID-19 pandemic, our program continued to pivot and remain adaptable. We successfully completed the 2020-2021 season by opening our **20** traditional sites and **4** mobile sites utilizing a Walk-Up/Drop-Off model. This model was designed to be safe for taxpayers, staff and volunteers. The Walk-Up/Drop-Off model allowed the taxpayer to visit a convenient site, be screened by a Free Tax Prep screener and drop off their tax return. The taxpayer returned in 48 hours to review and sign the completed return.

This success was accomplished through the dedicated commitment of **89 volunteers**. Amidst many challenges from snow storms to site closures, Free Tax Prep served **11,337** tax filers this year, resulting in **\$17 million in refunds, including \$4 million in Earned Income Tax Credits (EITC)**.



3-5 YEAR FTP COMPARISON

Our efforts over the past years have produced significant results and an influx of EITC dollars for individuals and families. The EITC is a refundable tax credit available to low-income working families and that can lead to dramatic reductions in childhood poverty.

Tax Filing Season	Customers Served	\$ Federal Refunds	\$ of EITC
2020 Tax Season	11,337	\$17 Million	\$4 Million
2019 Tax Season	10,980	\$14 Million	\$5 Million
2018 Tax Season	10,276	\$12 Million	\$4 Million
2017 Tax Season	9,856	\$12 Million	\$4 Million
2016 Tax Season	9,394	\$13 Million	\$4 Million

TAXPAYERS AND VOLUNTEERS ENJOY THEIR FREE TAX PREP EXPERIENCE.

"I have always wanted to be a part of a nonprofit to help my community, and United Way of the Mid-South gave me that chance. I have been a volunteer with United Way for four years. Through volunteering with UWMS Free Tax Prep, I have learned a lot about flexibility and having a self-starter attitude. But, most important, being able to deal with the community."

— Volunteer Bria Bowers

"I have been a volunteer with the Free Tax Prep program for roughly 40 years. As a prior IRS employee, I was used to assisting those in need of tax preparation in order for them to be in compliance. In preparing the returns for the people, this saved them from having to pay someone to prepare their returns. In many cases, this resulted in refunds that could be applied to the outstanding tax balance that already existed. This resulted in a WIN-WIN result of which most were so appreciative. That's why I volunteer with the program."

— Volunteer Denise Williams

"I always come here because the workers are so nice and professional. They act like they're happy to serve you."

— Happy Customer

LEBONHEUR GRANT

During the 2020-2021 tax season UWMS, Free Tax Prep program entered a three-year partnership with **Methodist LeBonheur Community Outreach** and **Early Success Coalition**. A federal grant was awarded to increase the awareness of the **Earned Income Tax Credit**, along with increased usage of Free Tax Prep services in 16 zip codes throughout the Mid-South. One of the awareness tools utilized was a MATA (Memphis Area Transit Authority) bus wrap which advertised the Free Tax Prep program. **6,591** taxpayers received FTP services in the targeted zip codes.



89

volunteers

to answer the call
across

24

sites

to ensure Free Tax
Prep assistance
was available to all
Mid-Southerners



IN LOVING MEMORY OF YVONNE HOWARD

United Way of the Mid-South's Free Tax Prep program lost a beloved and significant member, Yvonne Howard. Yvonne was instrumental in our successful expansion of FTP across all 8 counties. She played a vital role in our response to COVID-19 to introduce our Drive-Thru model. Her foundation was a "can-do attitude", which led to her commitment to the program's being a success for those we served. She lived FTP! Her primary focus was to ensure families received the tax returns they deserved for many years. During the tax seasons, she worked tirelessly to provide assistance across our entire service region... making herself available 24/7 in order for UWMS to reach as many families as possible with this program.

Job well done, Yvonne! Your memory will live on in Free Tax Prep.

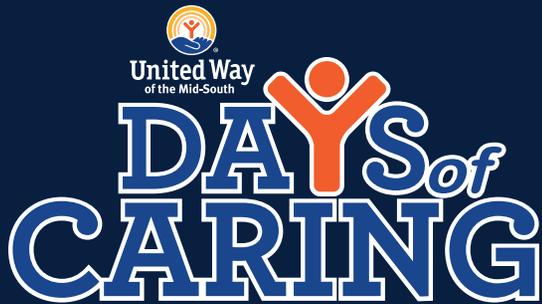
YEAR IN REVIEW

UWMS recognizes the value of volunteer contributions in maximizing the ability of non-profits to fulfill their missions. Through Volunteer United, UWMS deploys volunteers to gather supplies and provide labor to area agencies. United Way ensures Mid-Southerners are able to connect their passions to service. Throughout the year, a variety of opportunities are available to support the needs of our neighbors.



STUFF THE BUS SCHOOL SUPPLY DRIVE JULY 1-31, 2020

Schools supplies and generous monetary donations were collected for Shelby County School students. Employees from **8** companies participated, generating an economic impact of **\$18,068** for Mid-South students.



DAYS OF CARING SEPTEMBER 5-6, 2020

Engagement may have looked different this year, pivoting during the pandemic to offer both in-person and virtual volunteer opportunities; but nearly **1,200** volunteers rolled up their

sleeves and donated **4,800** hours of service and provided almost **\$135,552** of economic impact to the Mid-South during Days of Caring. Special thanks to MLGW, IP, Valero, Ameriprise and Smith and Nephew for participating in virtual and in-person activities to support our most vulnerable neighbors.



COMMUNITY IMPACT TOWN HALL: FROM RACIAL WEALTH GAP TO ECONOMIC JUSTICE OCTOBER 16, 2020 | VIRTUAL

United Way of the Mid-South was honored to host the Community Impact Town Hall. During this powerful session, key points were addressed relevant to our mission of creating economic advancement and opportunity for all.



LIGHTS ON AFTERSCHOOL OCT 22, 2020

Our Community Impact team partnered with the Afterschool Alliance for their annual Lights On Afterschool.

United Way supports several agencies that have afterschool programs. We are committed to organizations that provide families with the tools they need for success.

In support of Lights On Afterschool, United Way had the Hernando DeSoto bridge's "Mighty Lights" turn blue and yellow.





BOUNTIFUL BASKETS NOVEMBER 19, 2020

Through United Way's Bountiful Baskets initiative, we bring food and joy during the holidays, in partnership with the Memphis AFL-CIO Central Labor Council.

With the onset of the pandemic, the annual event pivoted with the times. In 2020, the event transitioned to a drive-through holiday parade during which each family delighted in the creativity of local labor members who transformed their vehicles into holiday floats and dressed with holiday flare! As holiday music filled the air, each family stayed safe and secure in their vehicles, took in the sights and were met at the end of the parade by a jolly team member who provided **150** families with **\$50** Kroger gift cards to purchase their holiday meal.



ANNUAL BUSINESS MEETING JANUARY 25, 2021 | VIRTUAL

United Way's Annual Business Meeting offered corporate partners, nonprofit agencies, donors and volunteers the opportunity to hear from our executives about developments and upcoming plans at UWMS, and to receive additional details regarding information and events outlined in the Annual Report.



CANDID CONVERSATIONS FEBRUARY 25, 2021 | HOPE PRESBYTERIAN CHURCH

This event offered our community the opportunity to ask national and local health professionals questions about the COVID-19 pandemic and the vaccine.



BEST OF THE BEST AWARDS JUNE, 2021 | SOCIAL MEDIA

In contrast to past years that have seen a one-day celebration of our corporate partners, this year's "Best Of The Best" Awards spanned the entire month of June via our social media channels, allowing us to highlight **ALL** of our corporate partners who have gone above and beyond in their support for our United Way through their respective fundraising campaigns. Thank you to all of the companies, donors, supporters and volunteers who have created meaningful, lasting change in our communities during these challenging times. United Way of the Mid-South is extremely grateful for the overwhelming support, as together, we help individuals and families *"move from where they are to where they dream to be!"*

CORPORATE AND COMMUNITY COLLECTION DRIVES

UWMS partnered with corporations and other community partners to meet the expanded critical needs of families during COVID-19. Various collections drives were held to provide food, clothes, PPE, toys, etc. for families in the Mid-South. The economic impact of items collected totaled **\$236,115**.

FUELING THE CAUSE

During the COVID-19 pandemic, the United Way of the Mid-South has gone through revolutionary changes. One thing that has remained consistent is the **workplace campaign**, which generates **80%** of our annual revenue. In 2020, the pandemic did, however, cause many companies to strategically change the manner in which they conducted their workplace campaigns. With employees working from home, the stage was set for the emergence of the virtual campaign. The decision to go virtual provided the structure for companies to continue to afford thousands of Mid-South employees the opportunity to join the United Way in its fight against generational poverty in our 8-county footprint.

Donations fueled over **200 programs** desperately needed in our community, and particularly by those adversely affected by the disruptions caused by COVID-19. The virtual campaign proved to be a success, by providing the platform to engage more employees and allowing for the dissemination of creative virtual campaign collateral to inspire giving. Our corporate partners' success was recognized during **Best Of The Best**. This year, due to the tremendous, unexpected level of participation in workplace campaigns - which actually exceeded our very modest projections for our mid-pandemic campaigns - and the overall, focused effort by our corporate partners, we decided to bestow upon **ALL** of them the title of Best Of The Best.



Social media post honoring a few of the Best Of The Best.



CAMPAIGN REPRESENTATIVES

Each year, United Way of the Mid-South asks local organizations to select one or more of their valued employees to participate in the **Campaign Representative Program**. The Campaign Reps are a vital part of campaign season. The work could not be done without them. In spite of COVID-19, the participants were able to assist Resource Development Managers and the **Employee Engagement Champions** within the companies, to facilitate robust workplace campaigns. We are thankful for their faithful support and the willingness of their parent companies to support this leadership enhancement-based program.

CORPORATE PARTNERS

United Way of the Mid-South made a concerted effort to educate the community about **Driving The Dream**. The need has never been greater for multi-generational wrap-around services. As a result, we saw an increase in DTD referrals, even referrals from some corporate partners. We thank our corporate and nonprofit partners, individual donors and volunteers, for their continued commitment to serving the community by enhancing the lives of those who are striving to move *from where they are to where they dream to be*.



EMERGENCY FOOD AND SHELTER

United Way administers Federal Emergency Food and Shelter Grants for Shelby County and Crittenden County. In response to the increased need due to the pandemic, FEMA released additional funds to support local emergency needs. A total of **20** agencies received **\$979,425** in funding to provide food, emergency shelter, utility assistance and assistance paying mortgages/rent.

VOLUNTEER UNITED

United Way of the Mid-South deploys volunteers to expand and enhance the reach of non-profit agencies. Through Volunteer United, **1,390** volunteers supported UWMS in fundraising, fund distributions and organizational management as well as in providing community services that support the mission of United Way. This gift of self, donated by community volunteers offering their time and service to our non-profit partners is valued at **\$236,115**.

CAPACITY-BUILDING SUPPORT

United Way of the Mid-South's commitment to excellence in the provision of human services is supported through the capacity-building strategies of *Driving The Dream*.

In addition, in partnership with the University of Memphis, we facilitated the **Building a Trauma Sensitive Community** project to support human services providers in implementing trauma sensitive strategies, policies and practices within their agencies. **13** organizations participated in this year-long commitment in 2020-2021.

With UWMS grant funding, the now-shuttered ACE Awareness Foundation developed an extensive training for youth services providers, **Supporting Youth: A Trauma Informed Approach**. The ACE Awareness Foundation turned the curriculum materials over to us. United Way of the Mid-South has, in turn, shared the curricular materials with **29** youth trainers across Tennessee.

Always hard workers, Promela and her husband were financially stable. That is, until the pandemic hit. Promela's job came to a standstill when shutdowns were required. She was furloughed. Never before in this situation, she was forced to apply for unemployment. Then, her husband contracted COVID. It was a bad case. But after months in the hospital he was released to go home. Unfortunately things weren't the same. COVID complications lingered and he continued to be in poor health. The doctors warned that it would be a long road to recovery. So long, that the unemployment benefits ran out, but he was not healthy enough to return to work. "We were in a bind," says Promela. They had depleted their savings. Then an unemployment benefits representative told her to contact Fayette Cares. She made the call and quickly learned about the help available to her and thousands of others in her situation. It's not easy to ask for help, but the staff of Fayette Cares offered heartfelt support and compassion. "Everyone is just so nice!," shared Promela. The moment she came to the office, she was filled with hope. Because of you, Promela and her husband were able to stay afloat. "I had never even heard of Fayette Cares," she says, "but I don't know what we would have done without your help. Thank you!" Promela's husband is expected to return to work in the coming months, and she is hopeful that as things begin to return to normal, she'll be back out there too.

— Fayette Cares, Inc.





UNITED WAY OF THE MID-SOUTH
TOCQUEVILLE SOCIETY

In 1984-1985, seventeen local philanthropists banded together to support United Way of the Mid-South at the highest levels of giving by creating the United Way of the Mid-South Tocqueville Society. Each member contributed \$10,000 or more to impact the challenges facing our region. The men and women who have joined The Society over the years and their demonstrations of support have helped improve education, financial stability and health for countless thousands of people across the Mid-South.

The mission of the United Way of the Mid-South's Tocqueville Society is to change lives through philanthropic leadership focused on the building blocks for a better life; a quality education that leads to a stable job, financial stability that can support a family through retirement, and good health.

We extend our heartfelt thanks to our Tocqueville Society donors. You each played a vital role in creating long-lasting change while building a network of like-minded leaders across the Mid-South. Your support of United Way is invaluable, and allows individuals and families to advance *from where they are to where they dream to be*.



JOHN PETTY III

Raymond James
UWMS Tocqueville Society Chair

*"I have been a United Way of the Mid-South board member and in charge of The Tocqueville Society for the last 5 years. In this position, I see very up close how important Tocqueville Society donors are to the total of United Way of the Mid-South funds raised. Our 200+ members, with each contribution being \$10,000 or greater, provide approximately 30% of total United Way contributions, while our group is less than 1% of total contributors. These contributions, of course, flow through to United Way recipient agencies, which help the beneficiaries of agency services in the eight county area that we serve. Our service area has many people suffering from intergenerational poverty, poor health, underemployment and low income, food insecurity and inadequate housing. Our services especially through the **Driving The Dream** program, target help for people in need. Your contributions at this significant level greatly help, as you can see from the large portion The Tocqueville Society provides. So thank you so much for your most generous support. We hope you can continue at your current level of contributions or greater because living conditions, which were difficult before the COVID-19 pandemic, are in many cases much more difficult for those suffering now."*

FINANCIAL REPORT

STATEMENT OF ACTIVITIES

JULY 1, 2020 — JUNE 30, 2021

REVENUE	2021	2020
ANNUAL CAMPAIGN		
Contributions Received	\$11,069,513	\$16,104,298
Less Donor Designations	-\$1,642,521	-\$4,114,691
Less Provisions for non-collectible pledges	-\$478,990	-\$933,400
	\$8,948,002	\$11,056,207
Investment Income (loss)	\$1,660,676	-\$251,743
Endowment Fund Donation	\$5,000,000	-
Change in Trust	\$142,273	-\$10,716
Other Contributions	\$244,372	\$478,215
PPP Loan Forgiveness	\$796,867	-
Grants and Contracts	\$2,911,136	\$2,269,437
Miscellaneous Income	\$4,515	\$22,043
TOTAL REVENUE	\$19,707,841	\$13,563,443

EXPENSES	2021	2020
PROGRAM SERVICES		
Program Investments	\$6,331,429	\$11,754,310
Less Donor Designations	-\$1,642,521	-\$4,114,691
NET FUNDS DISTRIBUTED	\$4,688,908	\$7,639,619
Community Service	\$2,903,978	\$2,973,059
Grant Expense	\$1,810,702	\$1,784,290
TOTAL PROGRAM SERVICES	\$9,403,588	\$12,396,968
SUPPORTING SERVICES		
Fundraising	\$636,559	\$757,932
Management & General	\$1,510,878	\$1,604,787
TOTAL SUPPORTING SERVICES	\$2,147,437	\$2,362,719
TOTAL EXPENSES	\$11,551,025	\$14,759,687

United Way of the Mid-South remains committed to those we serve. Please join us in the fight for economic self-sufficiency and "opportunity for all".

Text **POVERTY** to **40403** or scan this code to give.



IN LOVING MEMORY OF DYNNICE PERRY

United Way of the Mid-South's Finance Department suffered a tremendous and sudden loss to their team when long-time employee, Dynniece Perry, and her husband Tom were killed in an automobile accident. Dynniece worked at United Way for over 20 years in the Finance Department and was a true friend to many. She wore many different hats during her tenure, and was a wealth of knowledge on all things relating to UWMS. Her kind spirit, patience, and dedication were obvious not only to those who worked with her daily, but also to donors as well. She was a "jack-of-all-trades" who knew the ins and outs of everything related to the business at United Way, and was happy to share her knowledge with anyone. There is no way to express the hole that this leaves in our organization; and those of us who are left will strive every day to bring the same amount of kindness and grace to our job as Dynniece did.

Dynniece, you will be forever missed, not only as a co-worker but as a friend.



of the Mid-South

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