



United Way of the Ozarks



# ANNUAL

# REPORT

## 2023



# A NOTE

# FROM OUR CEO



Do you recall how we've discussed changing everything at United Way of the Ozarks over the past few years?

Well, we did it. And now we're seeing the results from the first year of our new strategy, which you will see in this annual report. I'm hopeful you will be impressed by the incredible work of our team, board, and partner nonprofits.

The results give me goosebumps.

A few years ago, we changed our grant application process to make it more competitive. The result? Our nonprofit community stepped up and proposed some incredible programs.

We changed our investment process. The result? Our impact is more significant and more focused.

We set a new emphasis on building "community ownership." The result? New programs allow people to help shape their hometown and make a difference. And it's working.

I hope you find this report inspiring. I hope it ignites in you a desire to get involved. Join us!

A handwritten signature in blue ink, appearing to read "Alyson Smith". The signature is fluid and stylized, with a long horizontal line extending from the end.

PRESIDENT & CEO, UNITED WAY OF THE OZARKS



## Community Investment Committee

Cindy Norman, *Co-Chair*  
 Stephanie Weis, *Co-Chair*  
 Matt Aug  
 Austin Beshears  
 Amy Carr  
 Stephanie Clark  
 Katelynn Couch  
 Brandie Fisher  
 Missy Forgey  
 Josh Garetson  
 Jen Johnson  
 Randy Presley  
 Meredith Roberts  
 Jennifer York

## Board of Directors

Joan Barrett, *Chair*  
 Clif Smart, *Past Chair*  
 David Agee, *Vice Chair*  
 Mike White, *Treasurer*  
 Shawn Calhoun, *Secretary*  
 Stephanie Weis, *CI Co-Chair*  
 Rachel Anderson  
 Brian Brawley  
 David Cook  
 Janet Dankert  
 Steve Dooley  
 Jason England  
 Hollie Elliott  
 Josh Garetson  
 Stephen Hall  
 Barbara Lucks  
 Brian McDonough  
 Dan Montgomery  
 Karl Quinn  
 Stephanie Rutledge  
 Ryan Sivill  
 Steve Stodden  
 Katie Towns  
 Pam Yancey

## 2022 Campaign Cabinet

Gary Gibson, *Co-Chair*  
 Morey Mechlin, *Co-Chair*  
 Rachel Anderson  
 Kevin Ausburn  
 David Ross  
 Brent Baldwin  
 Emily Denniston  
 Jean Harmison  
 Jessica Harmison-Olson  
 Jena Holtberg-Benge  
 Kris Inman  
 Dr. Stephen Kleinsmith  
 Dr. Grenita Lathan  
 Darline Mabins  
 Brian McDonough  
 Todd Parnell  
 Danny Perches  
 Robin Robeson  
 Stephanie Rutledge  
 Gary Schafer  
 Ryan Sivill  
 Leila Voss  
 Mark Walker  
 Kim Whitener  
 Paul Williams  
 Rusty Worley  
 Bryant Young

## 2023 Campaign Cabinet

Brent Baldwin, *Co-Chair*  
 Morey Mechlin, *Co-Chair*  
 David Agee  
 Jim Anderson  
 Kevin Ausburn  
 Justin Butler  
 Erin Danastasio  
 Gary Gibson  
 Jessica Harmison-Olson  
 Jena Holtberg-Benge  
 Dr. Matt Hudson  
 Dr. Stephen Kleinsmith  
 Ben Lampert  
 Dr. Grenita Lathan  
 Christian Lewis  
 Brian McDonough  
 Matt Morrow  
 Todd Parnell  
 Stephanie Rutledge  
 Dr. Karen Scott  
 Ryan Sivill  
 Mark Walker



# OUR MISSION

UNITED WAY OF THE OZARKS UNITES PEOPLE, RESOURCES AND IDEAS TO ENHANCE LIVES IN THE OZARKS.

# OUR VALUES

ACCOUNTABILITY

IMPACT

COLLABORATION

INCLUSIVITY





**\$1.9** **MILLION** **REINVESTED IN**  
**OUR COMMUNITY**



**PARTNERING WITH**  
**14** **LOCAL**  
**NONPROFITS**

**FUNDING 21**  
**PROGRAMS**

**SERVING**  
**14** **COUNTIES**



**SERVING**  
**THE OZARKS FOR**  
**93** **YEARS**

# UNITED WAY OF THE OZARKS FINANCIALS

## AUDITED FINANCIAL STATEMENTS

**JUNE 30, 2022**

### TOTAL REVENUE

**\$2,415,598**

### TOTAL EXPENSES

**\$2,207,539**

## STATEMENT OF FINANCIAL POSITION

### Assets

Cash and cash Equivalents	\$1,220,715
Short-term investments	\$742,398
Promises to give, net	\$797,752
Accounts receivable	\$9,432
Prepaid expenses	\$3,196
Cash surrender value of life insurance policy	\$32,492
Long-term investments	\$3,892
Property and equipment, net	\$185,865
<b>Total Assets</b>	<b>\$2,995,742</b>

### Liabilities and Net Assets

Accounts payable	\$29,280
Deferred revenue	\$51,790
Net assets	\$2,914,672
<b>Total Liabilities and Net Assets</b>	<b>\$2,995,742</b>

## IRS FORM 990

PROGRAM SERVICE EXPENSES \$1,571,851

FUNDRAISING EXPENSES \$281,137

MANAGEMENT & GENERAL EXPENSES \$354,551

### TOTAL IRS FORM 990 EXPENSES

**\$2,207,539**

United Way of the Ozarks earned the Platinum Seal of Transparency, the highest level of recognition offered by GuideStar, the world's largest source of nonprofit information.

Platinum  
Transparency  
2023

**Candid.**

United Way's Board of Directors, comprised of volunteers, reviews and approves its annual budget and financial statements. All financial statements are audited annually by an external accounting firm.

# ACCOUNTABILITY

# IMPACT AREAS



**PATHWAYS OUT  
OF POVERTY**



**CHAMPIONING  
CHILDREN**



**60%**

**INVESTMENT IN  
UPSTREAM PROGRAMS**

Long-term actions  
designed to address  
upstream, root causes  
of social issues.



**30%**

**INVESTMENT IN  
SAFETY-NET PROGRAMS**

Short-term strategies  
providing immediate  
safety-net services  
to families in crisis.



**10%**

**INVESTMENT IN  
INNOVATIVE PROGRAMS**

New, innovative  
approaches to  
address community  
needs and emerging  
challenges.

## FUNDING STRATEGY



# PILLAR AWARDS & DONOR RECOGNITION

2022/23 Campaign

United Way of the Ozarks is proud to recognize the outstanding individuals and organizations that have gone above and beyond to create positive change in the Ozarks.



## CORPORATE HUMANITARIAN OF THE YEAR



### SRC Holdings Corporation

Since 1983, SRC has been building some of the world's best brands in the agricultural, industrial, construction, truck, marine and automotive markets. Not only do associates take pride in their reputation as business people, but they take pride in their community by investing to create positive change.



## VOLUNTEER OF THE YEAR



### Randy Presley

Randy is a dedicated leader in his workplace and his community. He leads the United Way workplace campaign at SMC Packaging Group, a consistent trailblazer in giving and volunteerism. He goes above and beyond, always asking, "How can I help?" serving his community with enthusiasm.



## OUTSTANDING COMMUNITY SERVICE



### Council of Churches of the Ozarks

Council of Churches took a giant leap this year, consolidating its 10 community programs under one roof with a new headquarters. United Way is proud to partner with this incredible organization, and we applaud their innovative efforts to improve the quality of life for so many in our region.



# TOP 10 EMPLOYEE CAMPAIGN MANAGERS



- Jaime Craig**, Midwest Family Marketing  
**Sarah Curl**, Penmac Staffing Services  
**Reta Elliott**, Wilhoit Properties  
**Gerad Fox**, City Utilities of Springfield  
**Leah Lee**, SRC Automotive  
**Kenya Pearman**, Ollis/Akers/Arney Insurance & Business Advisors  
**Randy Presley**, SMC Packaging Group  
**Tracy Roberts**, EFCO  
**Angie Way**, BRP Architects  
**LaCinda Young**, Global Recovery Corp.



# TOP 20 WORKPLACE CAMPAIGNS



1. SRC Holdings Corporation
2. City Utilities of Springfield
3. John Deere Reman
4. FORVIS
5. Associated Electric
6. Missouri State University
7. City of Springfield
8. SMC Packaging Group
9. O'Reilly Auto Parts
10. Commerce Bank
11. CoxHealth Systems
12. Central Bank of the Ozarks
13. Great Southern Bank
14. Mercy Health Systems
15. American National
16. Arvest Bank
17. TransLand
18. Springfield Public Schools
19. Guaranty Bank
20. Ozarks Coca-Cola/Dr. Pepper Bottling Company



# 365 SMALL BUSINESS CIRCLE



- Ameriprise Financial: Achieve Private Wealth
- Bartlett & West
- BPJ Insurance
- Club Management Services
- Entrust Property Solutions
- Gorman Scharpf Funeral Home
- HOA Management Solutions
- Jeff Frye, Realtor
- Jimm's Steakhouse & Pub
- KPM Technology LLC
- N Form Architecture
- Premier Home Health, Inc.
- Schilling & Sellmeyer
- TelComm Credit Union
- The Grotto
- The WOK on Scenic
- Tomo Drug Testing
- The Whitlock Co.
- Traveller's House Coffee & Tea
- Wire Road Brewing Company

# OUR PARTNERS



**COMMUNITY  
PARTNERSHIP**

*Working Together to Build Strong Communities*

As our priority partner, CPO runs many essential programs. Capable Kids & Families supports families of children with a developmental delay or disability. One Door is a community outreach program providing housing, shelter intakes and referrals for homeless individuals in Springfield, MO.

Developmental Center of the Ozarks' pediatric therapy program provides early intervention therapy for infants as early as birth.



**Developmental Center  
OF THE OZARKS**



**CASA**

Court Appointed Special Advocates  
**FOR CHILDREN**

**CASA OF SOUTHWEST MISSOURI**

CASA's child advocacy program recruits, trains and supports community volunteers who assist the court in protecting the best interests of abused and neglected children in Southwest Missouri.



**BREAST CANCER FOUNDATION  
OF THE OZARKS**

BCFO's children's fund supports the needs of children in the home of families with a member in active treatment for breast cancer.



**Habitat  
for Humanity®**

*of Springfield, Missouri*

Habitat for Humanity's homebuying program provides a unique opportunity for families or individuals to build or renovate and buy a home through a 0% interest, 0% APR loan.



BETTY AND BOBBY ALLISON

**OZARKS  
COUNSELING  
CENTER**

*—helping you find your way*

Ozarks Counseling Center provides access to mental health care, regardless of a client's ability to pay. Their somatic integration processing tool is helping clients find deep and meaningful healing.



**KVC® Missouri**

*We all need connection.*

KVC Missouri's Ozark Family Resource Center provides short-term housing for youth in crisis, who are not in foster care.



Gifts made to United Way reach beyond one organization, funding **21 programs** at **14 nonprofit agencies**, championing our community's children and providing pathways out of poverty.



**BOYS & GIRLS CLUBS  
OF SPRINGFIELD**

Boys & Girls Clubs of Springfield's Shape Up program promotes youth wellness through after school mental health services, arts, sports, prevention education and leadership development.



**Victim Center**

**PREVENTION. INTERVENTION. EDUCATION.**

The Victim Center's 24-hour crisis hotline and counseling services are available to all victims of a violent or sexual crime. Their prevention education program teaches self-protective skills aimed at helping community members avoid victimization.

The New Pathways for Good Dads program helps low-income dads make changes to be "good dads" who are actively engaged with their children.



CCO's Math and Reading Buddy program helps students thrive by pairing them with a volunteer tutor during the school day. In addition, their centralized case management services help Springfield neighbors overcome obstacles to self-sufficiency.



Ozarks Literacy Council's one-to-one tutoring program helps both child and adult learners improve their skills in reading and literacy.



Harmony House Family Violence Center provides shelter, advocacy and education to survivors of domestic violence.



**Big Brothers  
Big Sisters.**  
OF THE OZARKS

BBBS of the Ozarks' community-based mentoring and Lunch Buddy programs create and support one-to-one mentoring relationships that ignite the power and promise of youth.

# OUR IMPACT



**658** UNHOUSED  
INDIVIDUALS  
MOVED TO  
STABLE HOUSING

**4,226 VICTIMS**   
RECEIVED SUPPORT IN A CRISIS

  
**2,705 YOUTH**  
WERE SUPPORTED  
BY A CONSISTENT,  
CARING ADULT  
RELATIONSHIP

  
**727** CHILDREN WERE  
GIVEN A HAVEN  
FROM ABUSE OR NEGLECT.

**792** YOUTH ACHIEVED  
NEW ACADEMIC &  
DEVELOPMENTAL  
MILESTONES



  
**3,155** PEOPLE RECEIVED MENTAL  
HEALTH COUNSELING  
REGARDLESS OF ABILITY TO PAY

# JAMES' STORY

Partnering with



When James was released from prison after a battle with addiction, he knew he needed to rebuild his relationship with his two sons. He joined the New Pathways for Good Dads program, a program partially funded by United Way of the Ozarks.

Through the Good Dads program, James learned how to reconnect with his kids, one conversation at a time. The program empowered him to make strides in his personal life and as a parent.

Today, James is thriving. He works a great job with benefits. He proudly provides for his sons, and sees them as often as possible for their favorite activities like fishing, putt-putt or hiking.

His kids are so grateful to have their "Good Dad" back in their lives.

United Way partners with 21 programs at 14 nonprofit agencies, providing resources for thousands of neighbors like James.



# LIVES CHANGED



# PROGRAMS & EVENTS

## DAY OF CARING

Day of Caring is the largest, single-day volunteer event in Southwest Missouri. This year's event engaged over 1,300 volunteers, the value of volunteer contributions totaling over \$167,000.

## UNITED FOR GREATNESS

United for Greatness is a one-day workshop hosted in partnership with the Great Game of Business, pairing nonprofit agencies with uniquely skilled volunteers for a day of pro-bono consulting. This year's event engaged ten nonprofit agencies and fifty experienced volunteers, the value of volunteer contributions totaling \$76,440.

## WOMEN UNITED

Officially launching in 2024, Women United is an expanded network of civic-minded women united by a specific cause, fueling their passion and meeting our community's most critical needs.

## CAMPAIGN KICKOFF

The annual Campaign Kickoff recognizes the top hand-raisers, game-changers, and difference-makers in our community. This year's event featured drinks, appetizers, and live music! In conjunction, United Way hosted its first-annual community-wide cornhole tournament.

## COMMUNITY FIELD TRIP

Launched just this year, Community Field Trip is a professional development experience combining classroom learning with community tours! It's a great team-building experience for local companies wanting to engage more in the community.



## 2023 DAY OF CARING SPONSORS

### **PRESENTING SPONSOR**

Springfield Cardinals

### **GOLD SPONSORS**

American National  
Bass Pro Shops  
Chase  
Mercy  
417 Magazine

### **SILVER SPONSORS**

Commerce Bank  
CoxHealth  
Great Southern Bank  
Paddio  
WiseGuys Screen Print

### **BRONZE SPONSORS**

Burrell Behavioral Health  
KPM CPAs & Advisors  
SMC Packaging Group  
Volt Credit Union

# VETERAN'S ASSISTANCE

In partnership with the American Red Cross, United Way of the Ozarks administers the Veterans Fund to provide emergency financial assistance to members of the U.S. military, National Guard/Reserve and veterans in our 14-county service area.

**44** VETERANS  
PROVIDED  
WITH ESSENTIALS  
LIKE HOUSING, UTILITIES OR  
TRANSPORTATION

**\$20,485**  
DISTRIBUTED TO  
VETERANS IN NEED

# EMERGENCY ASSISTANCE



United Way 211 is the federal 3-digit phone number connecting people in need to local experts who make finding help easier. 211 maintains a database of local services and resources for meeting basic needs like housing, food, transportation and healthcare.



United Way's cancer fund is a designated collection dedicated to helping cancer patients in need of financial assistance. This fund helps defray non-medical expenses, including housing, utilities, and transportation.





 **American  
Red Cross**

*"He was filled  
with gratitude  
& peace of  
mind..."*

## BURL'S STORY

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Veteran Burl Brooks uses a bicycle as his main form of transportation. He was devastated when his bike broke down, and the repair bill was more expensive than purchasing a new one.

Through the Veterans Emergency Assistance Fund, United Way provided Brooks with a brand-new bicycle. He was filled with gratitude and peace of mind, knowing he'd be able to get back and forth to work safely once again.

# AFL-CIO COMMUNITY SERVICES



United Way of the Ozarks has a long, rich history with the AFL-CIO. Together, with the Springfield Central Labor Council, this partnership improves public and private support systems for workers and their families.

## 2022/23 CAMPAIGN CONTRIBUTIONS:

Special thanks to the contributing unions and organizations committed to **championing our community's children** and providing **pathways out of poverty**.

- IBEW, Local 753
- Plumbers & Pipefitters, Local 178
- Springfield Central Labor Council
- Teamsters, Local 245
- Springfield Building & Construction Trades Council

## MISSOURI APPRENTICE READY

Last year, United Way began a partnership with the Missouri Works Initiative to support the Missouri Apprentice Ready Program, a 5-week construction pre-apprenticeship. It creates an industry-recognized entry point into the trades for traditionally underrepresented groups, creating a more equitable and diverse workforce. Since its inception, the program has helped 45 graduates improve their lives through workforce development.



# MAKE A GIFT TODAY



CHAMPION OUR COMMUNITY’S CHILDREN  
AND PROVIDE PATHWAYS OUT OF POVERTY.

Make a gift online!



Or mail payment to:

United Way of the Ozarks,  
320 N. Jefferson Ave.  
Springfield, MO 65806



## DONATION INFORMATION

NAME \_\_\_\_\_ COMPANY \_\_\_\_\_

ADDRESS \_\_\_\_\_ CITY \_\_\_\_\_

STATE \_\_\_\_ ZIP \_\_\_\_ PHONE \_\_\_\_\_ EMAIL \_\_\_\_\_

ONE-TIME GIFT \$ \_\_\_\_\_ RECURRING MONTHLY GIFT \$ \_\_\_\_\_

## PAYMENT METHOD

☐

CHECK ENCLOSED

☐

CASH ENCLOSED



**United Way of the Ozarks**

Clarence R. Wheeler Center  
320 N. Jefferson Ave.  
Springfield, MO 65806

NON-PROFIT ORG.  
US POSTAGE

**PAID**

SPRINGFIELD, MO  
PERMIT NO. 462



**GIVE.**

**ADVOCATE.**

**VOLUNTEER.**

**STAY CONNECTED**

   [UWOZARKS.ORG](http://UWOZARKS.ORG)