

GIVE. ADVOCATE. VOLUNTEER. LIVE UNITED.

MERRILL AREA UNITED WAY, INC.

2019 ANNUAL REPORT
(Presented February, 2020)

2019 IMPACT

Total Community Impact Allocations to 19 funded programs/agencies and other outside agency designations *budgeted* = \$160,606. In 2019 the total spent was \$167,486 on allocations to 19 United Way funded agencies for impact programming; including yet another 14 donor designation recipients with designations of \$6,880 as directed by the donors.

Add to that the total Community Fund expenditures of \$7,187. These dollars go to a specific request that supports community initiatives and our impact areas not covered by our funded agencies.

In 2013 the United Way Board established and maintains a Disaster Relief Fund with dollars available to support local major disasters. That fund's year-end balance is \$25,367. In 2019 we provided \$3,000 to the Plautz Family Fire Fund after they experienced a horrific fire at their home sending family members to the Madison Burn Center.

- In compliance with United Way Worldwide's directives, our local United Way focuses on three major impact areas: Health, Education and Basic Needs/Income.
- The Board designated \$6,000 for the 2-1-1 Call Center to service Lincoln County for 2019. This call center provides key information and resources for all Lincoln County residents.
- We continue to support the County and other community organizations promoting countywide health as identified in the current Lincoln County Health Plan. The plan focuses on 3 areas; oral health, mental health and nutrition/healthy eating.

- Always looking to the future and further improvement, the Board of Directors engaged in a planning session in April led by Melinda Osterberg. The Board reviewed overall progress and established current and future organizational goals. MAUW has continued to work on the prioritized goals that follow.....
 - *Recruit new companies for the 2019-2020 campaign*
 - *Build relationships with community agencies*
 - *Collect and communicate impact stories from agencies*
 - *Work toward establishing a Merrill Area United Way Endowment Fund*
- These goals were addressed all year in varying degrees.
- The Board of Directors personally visited our funded agencies during the summer to enhance relationships and to gain a better understanding of their programs. This is both beneficial to our Board members and our agency representatives.
- Through the Community Fund we also supported Christmas Spirit Appeal, delivery of 2 tons of potatoes to area food pantries and HAVEN, the new Veteran Building, Empty Bowls project, Food For Kids, the Saint Vincent DePaul Bed Project, Pinecrest Christmas gifts, and the 2-1-1 Help Line .
- Allocation Teams met in November. The teams reviewed mid-year progress of all impact programs and evaluated the 19 submitted agency allocation applications for 2020 funding.
- United Way was again recognized by FamilyWize for encouraging use of the program which resulted in thousands of dollars saved for Merrill area families for prescription drugs in 2019.
- Regular monthly articles ran in the Foto News to highlight United Way and the services supported. It also created greater community awareness of MAUW's role in the community.
- Media releases, speaking engagements and media interviews were done throughout the year.
- United Way ads have periodically been shown on the big screen at the Cosmo Theater to help get our message out.

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2019 IMPACT CONTINUED

- Two Board volunteers continue to enhance the United Way Facebook page and upgrade our website at merrillareaunitedway.org. We offer Pay Pal as an option for donors/donations.
- Several of our agencies went through management level staff changes, which requires some added attention and support to the new staff members.
- All United Way funded agencies participated in the mid-year reports demonstrating how they impact their clients with the dollars provided by United Way. This information is reviewed by the Board of Directors. It serves as a mid-year benchmark in their success of having true impact.
- In December, concluding the most successful campaign to date, the Board approved \$174,055 for 2020 allocations to agencies; an increase of 8.37% from 2019.

2019 OPERATIONS

- Merrill Area United Way has complied with all United Way Worldwide compliance measures, filing all necessary documents and the very vigorous reporting. These included the annual Membership Certification and the Data Base II reports. ***United Way Worldwide has annually acknowledged and credentialed our organization for meeting the standards of excellence.***
- The United Way 2018 finances were audited by Kerber Rose CPA's. MAUW met with acceptable accounting standards. All appropriate federal and state tax reporting and payments were completed.
- Additionally, the Board makes certain that all appropriate insurances are carried by the organization.
- Full oversight of all related employee records, tax reporting and filings are also accounted for.
- The Wisconsin Department of Finance Annual Report and Wisconsin Form 1952, and other State Credentials reports were filed before deadlines.
- Campaign leader – Church Mutual Insurance raised \$175,602.

Other company campaigns were done by Weinbrenner Shoe Company, mBank, Wisconsin Public Service, Harley Davidson, Associated Bank, Xcel Energy, Park City Credit Union, State Farm Insurance, Liberty Mutual, Walmart, BMO, State Farm, Lincoln County, and City of Merrill. Compared against last year, individual and retiree giving was stable.

- Enhanced the 2019-2020 campaign overall with increased outreach. Campaign work is imperative to our success and includes Company/Employee campaigns and our direct mailer to every household/business in efforts to increase donations.
- The Executive Director has been the program/speaker at several community groups, including Churches, the Merrill Optimists, Rotary Club, and others.
- The Executive Director actively participated in organizational development programs in 2019 through United Way Wisconsin, such as the Small Cities Symposium in Madison and others. Olsen also serves on the Wisconsin United Way Board of Directors.
- Additionally, the Executive Director regularly attends the Central WI United Way Directors meetings (hosted this group in Merrill in December), 2-1-1 meetings, the Aging & Disability Resource Center Advisory Board meetings, and is on the Merrill Community Homeless Center, Inc. Board of Directors.
- MAUW increased United Way's ongoing visibility and awareness through the media with press releases, media coverage, local BlueJay Radio programs, interest stories, and regular Foto News columns.
- A small business outreach survey was done in late spring and provided small business with information on United Way as well.
- The Board reviews, updates and adopts key administrative documents such as the Mission Statement, Code of Ethics, the Executive Director's Job Description, the Succession Plan and other key policy documents.

- United Way participated in several programs or events including: open houses, a health program; the Salvation Army Annual Meeting; Optimists Law Day; relevant meetings and numerous Chamber events.
- Our internal technology was improved as the Board agreed to move forward in replacing our computer to accommodate the imperative upgrade of our software to QuickBooks 2020, and to Windows 10 to sustain the necessary support. The new install took place in mid-December.

2019 AGENCY INFORMATION

- United Way funds programs that impact people's health, meeting their basic needs, and education. Each agency/program brings important, necessary services to our local people in need. Here is a brief glimpse of a few services:
- Big Brothers/Big Sisters has two Merrill programs; School-based and Community-based. They match adult and/or high school students (bigs) with younger kids (littles) to give them a stable portion of time to talk, interact, do special activities with. A new program called Bigs with Badges, matches police and fire department officers with kids. 71 kids are served.
- The Alzheimer's Association increases awareness about Alzheimer's and dementia to enable early detection through education programs; offer consultations, information, and referral services through a 24/7 helpline; assist in forming support groups; and help caregivers. An estimated 35-40 families are served through the helpline, and 10 through individual care consultations.
- Since March 4, 2019 the Merrill Community Homeless Center, Inc., a not for profit organization, has operated with some United Way support and lots of community support. Known as MAC Home, they have had over 1,400 safe stay nights for clients – impacting 141 people, of which about 20% are children. For the security and safety of all, they have a trained staff person on premises 24/7/365 days.

- Healthy Minds for Lincoln County is a coalition supporting healthy choices regarding alcohol, drugs, and vaping and the effects these vices have on social and emotional well-being. Services are available to all Lincoln County residents. United Way dollars fund 1) Parent Pact 2) Promotion of Know (parent information and resources) 3) Mock Teen Bedroom and 4) Social Norms Project.
- HAVEN provides a wide range of services to individuals and families affected by domestic violence and sexual assault. HAVEN can house up to 24 individuals in 6 rooms. HAVEN provides unduplicated services to an estimated 300 plus people a year, about 33% children.
- With many of the United Way funded agencies, volunteer opportunities are available. Visit their websites for more information.

2019 INITIATIVES

- Continue MAUW marketing momentum including ongoing development of the United Way website and Face Book page to increase usage, value, links, and focus on user ease.
- Recruit more agency clients and directors to share stories of assistance, success and improvements in lives of those receiving United Way support.
- CMIC worked with United Way to bring in 4 agency representatives to develop a campaign video telling agency stories. It was very impactful in the campaign and was also put up on the United Way website.
- Work toward a successful campaign, while recruiting company internal employee campaigns.

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2019 INITIATIVES - CONTINUED

- Our Endowment Fund Committee will continue to work on the development of an endowment fund through United Way to support local efforts. Information gathering will continue.
- The Board hosted an Agency Appreciation Picnic to acknowledge the great work done by our supported agencies. It was a great

networking opportunity for those that attended.

2019 APPRECIATION

- The United Way extends a heartfelt Thank You to Linda Murray & Associates and Reindl Printing for assisting MAUW with our annual marketing and campaign pieces.
- The Merrill Foto News, BlueJay 730 AM, and WJFT TV in Rhinelander have been wonderful media partners.
- Special thanks to Pat Burg and Joe Breaman II for maintaining our website and Joe Breaman II for managing our website and Facebook.
- Thanks to the Cosmo Theater for their ongoing support in getting our message out to the public.

The Merrill Area United Way Board of Directors continues to seek improvements for the organization in an effort to better meet the needs of the Merrill area people. The Board of Directors deserves a debt of gratitude for their ongoing work and dedicated service.

The Board recognizes the importance of being exemplary stewards of the funds provided and ensures great accountability. The ongoing development of investment resources to support the funded agencies is imperative. MAUW couldn't do it without the financial support provided through our participating companies and our generous, civic-minded community members who support United Way with their annual donations. For each and every donor whether an individual, retired person, employee or corporate gift – we are so very grateful.

2019 BOARD OF DIRECTORS

*Leah Burbach, President
Kelly Zagrzebski, First Vice President
Becca Klessig, Second Vice President
Clyde Nelson, Immediate Past President
Jane Dehnel, Secretary
Brian Richards, Treasurer
Dale Bacher
Joe Breaman II*

*Maria Brickner
Laura Forester
David Johnson
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Jamie Koch
Amy Krueger
Nancy Kwiesielewicz
Shannon Murray
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