

GIVE. ADVOCATE. VOLUNTEER. LIVE UNITED.

MERRILL AREA UNITED WAY, INC.

2023 ANNUAL REPORT
(Presented February 2024)



MERRILL AREA UNITED WAY, INC.

2023 – Changing Times, Increased Needs, Require Community Support!

The Merrill Area United Way was established October 27, 1947, to serve the community in a way no other organization does. Through the years United Way has provided an invaluable service by raising funds to support hundreds of local initiatives to help people. Under the United Way umbrella, about 20 agencies are supported each year.

In an era where technology is used in every facet of business, our organization continues to improve with our systems. In March of 2023, we upgraded our computer hardware and most of the software. We changed from an older QuickBooks financial software program to QuickBooks Online. Of course, all this came with a few complications, but we have managed to work our way through the changes. Another component is still underway.

In December the Board agreed to a contract with a company to redesign our website, which was set up more than 12 years ago. That effort is being worked on with a possible roll-out of late March. The company hired for design has created numerous United Way websites and we expect it will be much more informative and user friendly.

2023 IMPACT

Total community impact allocations to 20 funded agencies or disbursements to those affiliates was \$197,600. In addition, funds to other outside agencies from the community fund, direct designations and 2-1-1 services brought the total amount granted to \$204,230. The \$197,600 for allocations to all our funded agencies are granted for having impact programming in the three areas of our major focus. Additionally, the total Community Fund *budgeted* = \$10,000 and total spent = \$6,500.

Since 2013 the United Way Board established and has maintained a Disaster Relief Fund with dollars available to support local major disasters. In 2023 United Way assisted with two families faced with devastation from fires where the home/structure was destroyed. \$4,000 was disbursed from the Disaster Relief fund in 2023, leaving a year-end Disaster Relief Fund balance of \$9,243.

- In compliance with United Way Worldwide's programming preferences, our local United Way focuses on three major Impact Areas: Health, Education and Basic Needs/Income.
- Board continued support for and approval of \$6,000 for 2-1-1 Call Center to service Lincoln County for 2023. This call center provides key information and is the major referral resource system for all Lincoln County residents.
- United Way continues to support Lincoln County Health Department initiatives and other community organizations promoting countywide health as identified in the new 2023-2028 Lincoln County Community Health Assessment and Improvement Plan. The Plan focuses on 3 areas; 1) Promote Mental Health and Emotional Well-being; Support Healthy Lifestyles; and 3) Bolster Community Centered Resources for the 55 Plus Population.
- Always looking to the future and continuous improvement, the Board of Directors engaged in a planning session in April facilitated by Laura Huggins. The Board reviewed overall progress

2023 IMPACT CONTINUED

and established current and future organizational goals. MAUW has continued to work on the following 2023 prioritized.....

- Establish Marketing committee and brand awareness.
 - Coordinated campaign.
 - Board members to visit companies.
 - Testimonials from affiliate agencies.
 - Press releases.
 - Provide talking points -turnkey campaign for agencies.
 - Company recruitment.
 - Direct deposit and automatic payments – companies and individuals, setting up ACH's.
- Establish recommendation for future disaster relief fund. Review and update disaster plan/policy.
- Establish Committee for reviewing all policies and succession plan:
- The Board voted to have Leslie Blasing return to concert on August 8th and get underwriting sponsors.
- 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 beneficial to both MAUW and the agency.
- Through the Community Fund we also supported delivery of 2 tons of potatoes to area food pantries and HAVEN, Christmas gifts for Pinecrest residents, the summer lunch program for children, the 2-1-1 Help Line and a few other needs.
- The *Free Talks AODA program for teenagers*, sponsored by Lincoln County Healthy Minds, was sponsored by our Community Fund.
- The Concert for a Cause, a United Way fundraiser, featuring the talented Leslie Blasing from South Padre Island, TX was held on August 8th. The event netted just over \$5,000 for United Way. Thanks to our corporate sponsors.

- We continue to offer Pay Pal as an option for donors/donations.
- Allocation Teams met in fall. The teams reviewed mid-year progress of all impact programs and evaluated the 19 submitted agency allocation applications for 2024 funding.
- Numerous media releases, speaking engagements and media interviews were done throughout the year.
- In 2023 we started doing regular monthly WJMT Radio Program called “Our Town” on the last Monday of the month. It features United Way activities and highlights one of our funded agencies.
- Monthly articles ran in the Foto News to highlight United Way and create greater awareness of MAUW’s role in the community.
- Working with our agencies as they went through management level changes as in the case of Peaceful Solutions merging with Bridge Community Health for mental health counseling, and HAVEN changing Executive Directors.
- Maintaining the United Way Facebook and Website is ongoing. The Board has contracted with a professional webpage design company that specializes in United Way sites. The total rebuild of the site will be unveiled upon completion.
- United Way funded agencies participated in the mid-year reports demonstrating how their services impact their clients because of dollars provided by United Way. These reports serve as a mid-year benchmark in their success of having achieved true impact.
- In December the Board approved \$211,890 for 2024 allocations to agencies: up 6.75% from 2023.

2023 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.***

2023 OPERATIONS CONTINUED

- The United Way 2022 finances were audited by Gassner Co., SC CPA's. MAUW met with acceptable accounting standards. All appropriate federal and state tax reporting and payments were completed.
- Additionally, the Board assures 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 also filed.
- Campaign leader – Church Mutual Insurance raised \$184,536, other campaigns were conducted by Wisconsin Public Service, Harley Davidson, Associated Bank, City of Merrill, Nationwide, United Health Group, Pieper Electric, Associated Bank, Opportunity Development Center, and BMO. Comparing against last year, individual and retiree giving was down slightly.
- Given the many uncertainties of our economy, high inflation, life changes, job stability, and other outside influences, the efforts for our annual campaign were enhanced this year through additional outreach. However, the impact reflected a decrease in overall giving. Changes at Church Mutual perhaps influenced the campaign outcome as well. Not knowing what to anticipate, MAUW closed the year below our goal.
- 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.
- MAUW increased United Way's ongoing visibility and awareness through the media with press releases, media coverage, TV doing a fall central WI United Way brand campaign on WSAW - Fox, interest stories, and a regular, monthly Foto News Column.
- United Way participated in several programs and events including Lincoln County Childcare Coalition, **Live Well Lincoln** County

Health Care Forum, Merrill Boys & Girls Club Open House, United Way WI roundtables, Lincoln County Interagency meetings Wisconsin State Loyalty Day, Central WI United Way Directors meetings, Merrill Food Pantry Appreciation Event, Nicolet Bank's Chili Cookoff, Optimists meetings and events, and several Chamber of Commerce Business networking events.

- With the United Way parade float entered in the VFW Post 1638 Wisconsin State Loyalty Day Parade, our float received "**The Best of Community Organization**" entry award.

2023 AGENCY INFORMATION

- United Way funds programs that impact people's health; education; and meeting their basic needs of food, shelter, electricity, and heat. Each agency/program brings important, necessary services to our local people in need.
Here is a brief glimpse of a few services:
EDUCATION: Parkside Preschool Center, Big Brothers/Big Sisters, Boy Scouts, Girl Scouts, Merrill Boys & Girls Club, Merrill Safety Patrol, Family Resource Center, and Childcaring, Inc.
HEALTH: Bridge Health Clinic ((counseling services for AODA and mental health) and Epilepsy Foundation.
INCOME - BASIC NEEDS: St. Vincent De Paul Outreach, Merrill Community Food Pantry, North Central Community Action Program, Merrill Community Homeless Center (MAC Home), HAVEN, Salvation Army, Our Sisters House, BlueJay Nests and Christmas Spirit Appeal.
- Healthy Minds for Lincoln County is now handled by the Lincoln County Health Department and continues to work to support healthy choices regarding alcohol, drugs, and vaping and the effects these vices have on social and emotional well-being of teens and others.
- Big Brothers/Big Sisters has two Merrill programs, school-based and community-based. They match adults and/or high school students (bigs) with younger kids (littles) to give them a reliable person to talk to, interact with, and do special activities with. Also, Bigs with Badges, matches police and fire department officers with kids.

2023 AGENCY INFORMATION CONTINUED

- The Merrill Community Food Pantry provides food to help supplement families and individuals who are struggling to make ends meet. Approximately 5,000 people are fed during the course of a year. Incredible!
- HAVEN provides a wide range of services, including shelter, to individuals and families affected by domestic violence and sexual assault. HAVEN can house up to 24 individuals in 6 rooms. HAVEN serves to an estimated 300 people a year, including children.
- St. Vincent De Paul, North Central CAP and Salvation Army all provide services to assist with rental issues, utility shutoffs, basic needs, furniture, gas cards, etc. etc. to help people in dire straits. Invaluable!
- MAC Home, Merrill's homeless center, opened in March of 2019. MAC Home has now provided over 7,200 safe stay nights for clients – impacting almost 500 people, including children. With trained staff on premises 24/7/365 days, they counsel and guide clients toward independent living.
- MAUW also funds Our Sister Place, Tomahawk, another homeless shelter.
- So many dedicated agencies; 1,000's of successful stories!

2023 APPRECIATION

- Thanks to the “Concert for a Cause” planning committee for a great event featuring Leslie Blasing in August of 2023.
- United Way gives a heartfelt Thank You to Reindl Printing for assisting MAUW with our marketing and campaign pieces.
- WJMT BlueJay 730 AM Radio Station and Merrill Foto News and have been wonderful media partners, and fully support our ongoing work and messages.
- Special thanks to Pat Burg and Joe Breaman, II for maintaining and managing our website and Facebook.

UNITED WAY'S MISSION AND PURPOSE!

“To mobilize our community so the health, welfare, and education needs of all people are met with the ultimate goal being to improve their quality of life.”

A HUGE DEBT OF GRATITUDE TO ALL UNITED WAY DONORS!

MAUW's success depends on the financial support provided by our participating companies and our generous, civic-minded community members who support United Way with their annual donations. For each donor whether an individual, retired person, employee, or corporate gift – we are so very grateful.

The Merrill Area United Way Board of Directors continues to seek improvements for the organization to better meet the needs of the Merrill community and our area people. The Board of Directors deserves a debt of gratitude for their ongoing work and dedicated service. The Board members are exemplary stewards of the funds provided and ensures great accountability. The ongoing development of investment resources to support the funded agencies is imperative.

2023 BOARD OF DIRECTORS

Mike Ravn, President
Stacy Stevens, First Vice President
Joe Breaman II, Second Vice President
Maria Brickner, Immediate Past President
Jane Dehnel, Secretary
Brian Richards, Treasurer
Leah Burbach
Laura Forester
David Johnson
Lin Kautza
Becca Klessig
Mandi Klockow
Jamie Koch
Nancy Kwiesielewicz
Shannon Murray
Clyde Nelson
Kurt Rust
Susan Ryman
Janet Schreiber
Tom Zentner
Mark Zulliger
Dee Olsen, Executive Director

Merrill Area United Way, Inc.

P.O. Box 813

Merrill, WI 54452

715-536-2016

delores.olsen@merrillareaunitedway.com
