



United Way of Dane County • **The Power of Many. Working for All.**



2023 *Internal* Management Report

United Way
of Dane County



The Power of Many. **Working for All.**

Contents

Executive Summary Introduction.....	1
About This Report Connecting the Dots.....	2
Strategic Plan on a Page	3
Strategic Dashboards	4
Community Level Datasheet	6
Impact.....	8
Goal 1: Engage in sustainable long-term work on systems change with a clear focus on education, income, health and early childhood (2Gen).....	9
A. Plan for Community Well-Being Snapshots.....	9
B. Update on Housing Delegation.....	21
C. Update on Early Childhood Delegation	23
D. Update on Strategic Collaborations Led by UWDC.....	24
1. Schools of Hope.....	25
2. Achievement Connections.....	25
3. HealthConnect.....	25
4. Saving our Babies (ConnectRx Wisconsin)	26
5. Rapid Rehousing, Family Housing Stability, and Food Programs (Predolin).....	26
6. Reducing School Mobility (Siemer).....	27
7. Results from BYFY.....	27
8. Results from Public Policy Committee	28
Goal 2: Model equitable, anti-racist practices through all work: investments, partnerships, innovation, public policy advocacy, data and research and connection to resources.....	28
A. Equitable Grantmaking Process	28
B. Micro-Investments Process	30
Goal 3: Cultivate a stronger nonprofit ecosystem through trust-based collaborations to create positive community change.....	30
A. Results from 211.....	30
B. Engagement with Partner Agencies	33
C. Update to Donor Designation Affiliation Process	33
D. Nonprofit Salary Survey	34
Financial Health	35

Goal 1: Invest in and value our people and be an inclusion, diversity, equity and access (IDEA) leader.....	35
A. IDEA Accomplishments.....	35
1. Supervisor Feedback Survey	35
2. Vibe Check Survey	35
3. DEI Position	35
4. Values and Behavior Standards	36
5. Hybrid Meeting Standards	36
B. Board Equity Committee.....	36
C. Internal Volunteers.....	37
D. Staff	37
1. Retention.....	37
2. Staff Diversity	38
E. HR Projects and Accomplishments.....	39
1. Hiring Process	39
2. Onboarding	39
3. Employee Handbook	39
4. Compensation and Salary Guidelines.....	39
Goal 2: Modernize and innovate revenue streams and diversify donor base: corporate, employee, leadership/mid-level giving, affinity, out-of-workplace, endowment and major gifts/strategic collaborations.....	40
A. Overview of Revenue plan	40
B. Overview of 2023 Campaign	42
C. Workplace Giving	43
1. Cabinet CEO Visits and Goal Setting.....	43
2. Results by Division	43
3. Combined Campaigns.....	44
4. Loaned Executive Program.....	45
5. Community Voices Program.....	46
D. Leadership Giving and Affinity Groups	46
1. Women United	46
2. Lead United.....	47

3. Tocqueville Society.....	48
E. Grants and Major Gifts.....	49
1. Major Gifts	49
2. Strategic Collaborations	49
3. Update on United Way Foundation.....	50
F. Operational Work to Support Fundraising.....	51
1. Direct Response Efforts.....	51
2. Operational Innovation.....	51
Goal 3: Assure operational innovation and efficiency to maximize the use of resources.....	52
A. Financial Position	52
1. Reserves and Deficit.....	53
2. 2024 (2023 Campaign) Summary of Budgeted Investments	53
3. Update on Foundation Assets Statements	54
B. Operational Work in Technology Services and Finance	55
1. Project Management System Training.....	55
2. Data Dashboards.....	55
3. Data Management.....	55
4. ePledge	55
5. Interdepartmental Processes.....	56
6. Website	57
Partnership.....	58
Goal 1: Collaborate in ways that engage community voices, raise awareness of local issues, align shared resources and drive overall collective impact.	58
A. Messaging the Plan for Community Well-Being	58
B. Community Engagement and Inclusion Committee (CEIC).....	59
C. Labor.....	59
D. Law Enforcement and Leaders of Color Committee.....	60
Goal 2: Clearly define partners and the roles we play with each of them, ultimately defining how we want that role to evolve and advance.	60
A. United Way of Wisconsin.....	60
B. United Way Worldwide.....	61

Goal 3: Identify and train lived-experience experts who will take on leadership roles in community-change initiatives.	61
A. Boardwalk Academy.....	61
Engagement.....	62
Goal 1: Clarify our brand’s meaning in the community and assure internal understanding of who we exist for and how we serve them.	62
A. Brand Refinement and Development.....	62
1. United Way Worldwide Brand Update	63
B. Events	63
C. Media.....	64
Goal 2: Build relationships with businesses to support Corporate Social Responsibility, employee engagement (volunteerism and awareness), leadership development and civic leadership.....	65
A. Nominating and Governance	65
B. Building Relationships with New Business	65
Goal 3: Develop equitable, meaningful volunteer opportunities to connect and inspire through year-round engagement and communication.....	66
A. VolunteerYourTime	66
B. Community Volunteering.....	66
C. Community Kickoff	66
D. Corporate Volunteering.....	66
E. Business Volunteer Network (BVN).....	66
F. READI.....	66
G. LINC (Lead. Impact. Network. Change)	67
H. Toys for Tots	67
I. Engagement with Agency Partners.....	67
Conclusion.....	68
Appendix 1: Board Leadership	69
Appendix 2: Staff Names and Titles by Department	70
Appendix 3: 2022-2023 Public Policy Agenda	72

Executive Summary | Introduction

United Way of Dane County has deep knowledge of community needs, wide relationships to develop solutions and a long track record of results. In 2023, we launched our second century of work ***mobilizing the caring power of our community to create lasting change for multiple generations***. Everything we do is in service to our role as a leader of social impact, ensuring resources are well-spent, racial disparities are addressed and community health improves. We mobilize the community's caring power to create lasting change for multiple generations. The Power of Many. Working for All.

In 2023, we concluded telling the story of 100 years of innovation and impact, and launched the Plan for Community Well-Being, a “big idea” that meets our post-pandemic realities and kick-starts our next century.

A joyous Centennial Celebration at Monona Terrace in March attended by more than 1,000 community partners marked the culmination of our year-long celebration. The stories of United Way's past and the leaders that shaped the organization we know today were memorialized in the newly published book *United Way of Dane County 1922-2022: Celebrating a Century of Innovation, Collaboration and Positive Change* authored by Doug Moe. We rejoiced in the success of our annual campaign and Centennial-centered fundraising efforts that raised an additional \$24.6M.

As our second century begins, we're looking at Dane County's most challenging issues with fresh eyes. This vision for a brighter future is our Plan for Community Well-Being – a plan built with our community, for our community. Through this work, we aim to be a catalyst for collective impact, bringing people and systems together to solve our most challenging social problems.

As we move further into the next century, our impact work isn't the only area that needs reimagining. We know that the local workforce is changing, and our philanthropic market is competitive. In response, Resource Development is working with the board and local business leaders to reimagine our traditional employer-based fundraising model to engage the community in fresh ways and increase participation and revenue.

Deep work was accomplished on laying the groundwork for updating UWDC's brand for a planned rollout in 2024. Investments in the HR and technology areas were made, and teams found ways to increase efficiency and save staff time. Throughout the year, the Finance

Committee and staff carefully monitored the bottom line to preserve our financial integrity¹ while supporting needed changes in operations. By year's end we had both honored our past and charted a new path for the years ahead.

About This Report | Connecting the Dots

UWDC's 2022-2026 Strategic Plan frames the core work of improving peoples' lives and addressing inequity in Dane County. Five-year goals identify the strategic efforts needed to be successful in helping our community be a place where everyone thrives. Organizational goals fall under four strategic priority areas: Impact, Financial Health, Partnership and Engagement.

Our Strategic Priorities and Goals establish direction for our annual operating plans. The Internal Management Report (IMR) is the bridge between the goals set out in our Strategic Plan and the work that was accomplished during the year on the strategies laid out in the annual Operations Plan. The IMR provides accountability to our Board of Directors and a valuable reference document for Staff. UWDC's Community and Annual Reports are comparable external-facing public documents. The 2022 Annual Report highlighting our Centennial Year was mailed to all Dane County households for the first time in 2023.

We present the 2023 IMR in a new format organized by Strategic Priority Pillars and associated goals for the second year of this 2022-2026 planning cycle. With our brand story woven throughout, it is a reminder of how our ongoing work and who we are connects to our vision of building brighter futures by increasing individual and family well-being for Dane County residents.

Data dashboards are now available to track progress in the Impact, Financial Health, Partnership and Engagement areas. Noted here are the 2023 strategic dashboards.

¹ A planned deficit was budgeted for 2023 due to the lingering financial impact of the Covid pandemic on fundraising outcomes.

Strategic Plan on a Page



2022-2026 STRATEGIC PLAN

Mission: Unite the community to achieve measurable results that change lives.

Vision: United Way of Dane County will be a catalyst for inclusion and systemic change to address the needs of our community.

Values: Equity, Excellence, Innovation, Teamwork and Wellness.

United Way of Dane County IDEA (Inclusion, Diversity, Equity, Access) Statement reflects our commitment to support transformative social change and to address structural inequities and oppression. Learn more and see our full IDEA statement at www.unitedwaydanecounty.org/equity.

STRATEGIC PRIORITIES

IMPACT	FINANCIAL HEALTH	PARTNERSHIP	ENGAGEMENT
Be a change catalyst to establish and lead collective impact to advance family well-being in Dane County.	Be bold in advancing our methods of attracting philanthropic support to grow our impact and be accountable stewards of the resources entrusted to us.	Actively listen and connect with others to form mutually beneficial relationships, aligning our services around shared priorities that lead to authentic collaboration and action.	Grow participation and support by building awareness, strengthening partnerships and providing year-round opportunities to give, advocate and volunteer.
<p>Goal 1: Engage in sustainable long term work on systems change with a clear focus on education, income, health and 2Gen.</p> <p>Goal 2: Model equitable, anti-racist practices through all work: investments, partnerships, innovation, public policy advocacy, data and research, and connection to resources.</p> <p>Goal 3: Cultivate a stronger nonprofit ecosystem through trust-based collaborations to create positive community change.</p>	<p>Goal 1: Invest in and value our people and be an inclusion, diversity, equity and access (IDEA) leader.</p> <p>Goal 2: Modernize and innovate revenue streams and diversify donor base: corporate, employee, leadership/mid-level giving, affinity, out-of-workplace, endowment and major gifts/strategic collaborations.</p> <p>Goal 3: Assure operational innovation and efficiency to maximize the use of resources.</p>	<p>Goal 1: Collaborate in ways that engage community voices, raise awareness of local issues, align shared resources and drive overall collective impact.</p> <p>Goal 2: Clearly define partners and the roles we play with each of them, ultimately defining how we want that role to evolve and advance.</p> <p>Goal 3: Identify and train lived-experience experts who will take on leadership roles in community-change initiatives.</p>	<p>Goal 1: Clarify our brand's meaning in the community and assure internal understanding of who we exist for and how we serve them.</p> <p>Goal 2: Build relationships with businesses to support Corporate Social Responsibility, employee engagement (volunteerism and awareness), leadership development and civic leadership.</p> <p>Goal 3: Develop equitable, meaningful volunteer opportunities to connect and inspire through year-round engagement and communication.</p>

Positioning: United Way mobilizes the caring power of our community to create lasting change for multiple generations: **The Power of Many. Working for All.**



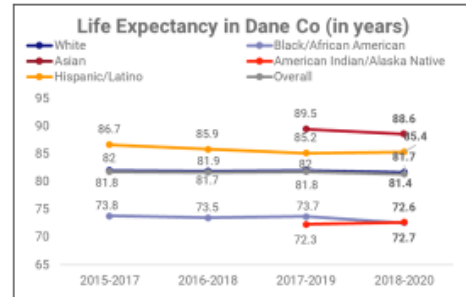
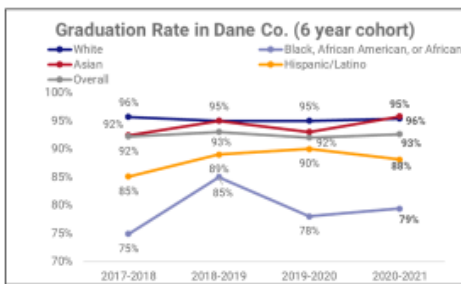
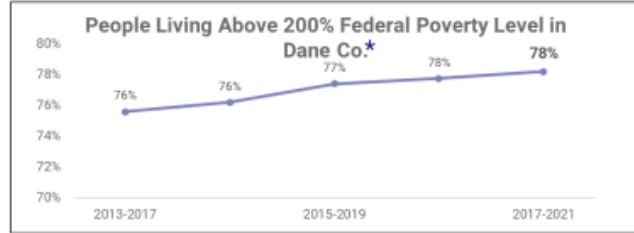
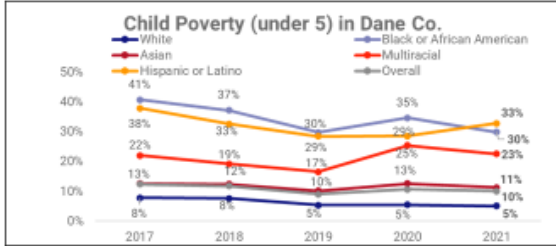
@unitedwaydanecco • www.unitedwaydanecounty.org • 2059 Atwood Avenue, Madison, WI 53704 • (608) 246-4350



The Power of Many. Working for All.

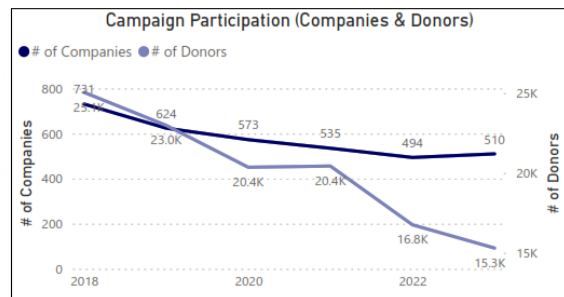
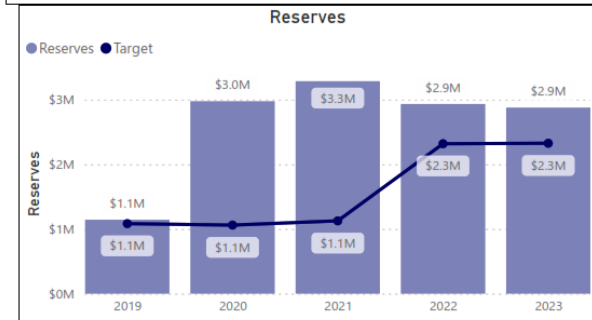
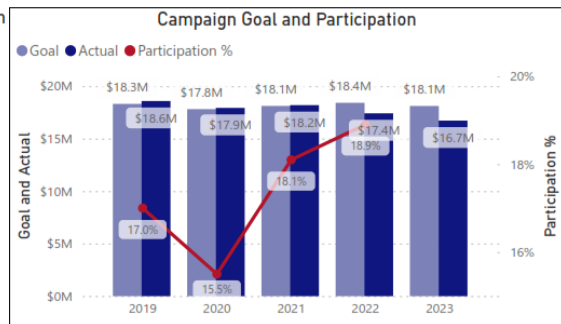
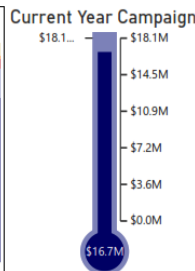
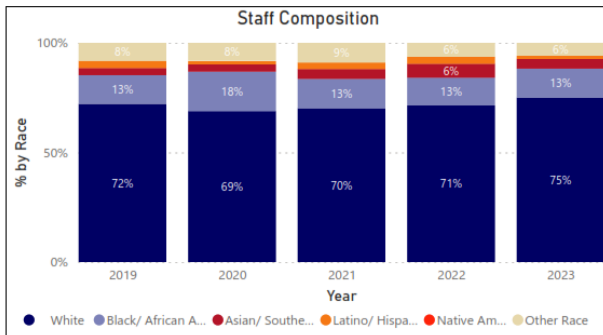
Strategic Dashboards

Strategy Dashboard

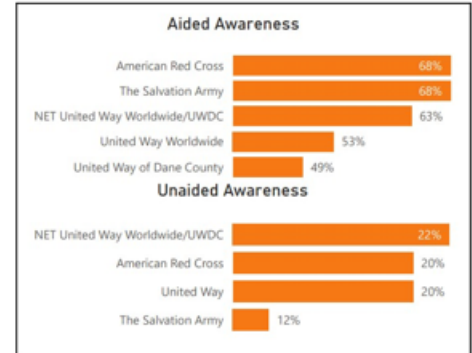
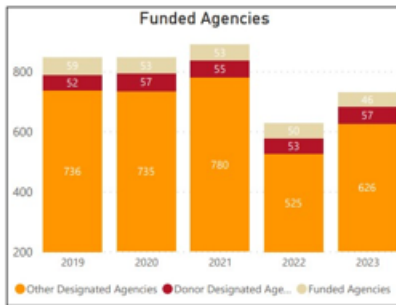
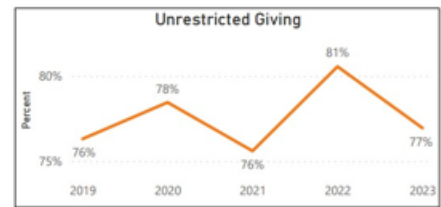
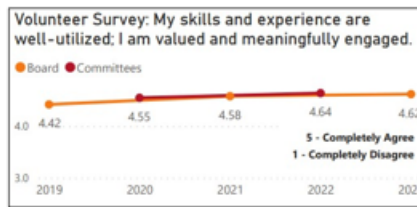
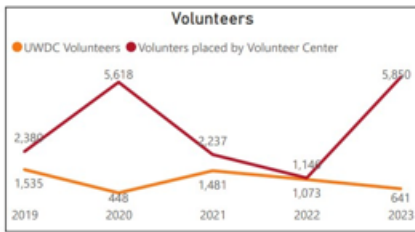


*The census does not publish 200% FPL data by race and ethnicity. It publishes poverty by race and ethnicity, but that is based on those below 100% of FPL

President's Report



Strategic Dashboard



Community Level Datasheet

United Way of Dane County Community Level Data

March 2023 to February 2024

At United Way of Dane County, accurate data helps us make informed decisions about the state of our community and keep track of change over time. Using the same data consistently across the organization helps us maintain a clear message about United Way of Dane County and our impact.¹

Dane County population (individuals): 555,474²

People experiencing poverty in Dane County: 58,399 (10.8% of population)³

73% of Camp Randall could be filled with people experiencing poverty in Dane County.⁴

By Race and Ethnicity: White: 8.9%; Black or African American: 21.4%; American Indian and Alaska Native: 12.0%; Asian: 18.4%; Native Hawaiian and Other Pacific Islander: 8.3%; Two or More Races: 18.4%; Hispanic or Latino: 18.7%⁵

3,033 children under 5 (10.1%) are experiencing poverty.⁶

Black and Hispanic/Latino children under 5 are six times more likely to be experiencing poverty than white children under 5.⁷

By Race and Ethnicity: White: 5.1%; Black or African American: 29.9%; Asian: 11.3%; Two or More Races: 22.6%; Hispanic or Latino: 32.9%⁸

4,900 families with children in Dane County are experiencing poverty (8.0%).⁹

By Race and Ethnicity (of Householder): White: 3.3%; Black or African American: 20.5%; American Indian and Alaska Native: 11.4%; Asian: 6.6%; Two or More Races: 14.6%; Hispanic or Latino: 15.8%¹⁰

2.4% of individuals 16 or older are experiencing unemployment.¹¹

Overall unemployment has decreased by nearly 50% since 5 years ago¹²; however, unemployment among Black people and American Indian and Alaska Native people in Dane County is twice as high as the overall rate (at 5.2% and 5.5% respectively).¹³

701 people (including 64 families) were experiencing acute homelessness in 2022.¹⁴

Homelessness decreased by 18% from last year but has increased by 20% from 5 years ago.

Black or African American people make up 40% of those experiencing homelessness in Dane County despite composing 5.1% of the total population.

Nearly 2 out of 25 students do not graduate from high school in Dane County (6 year cohort).¹⁵

Dane County Graduation Rate: 92.6% (5,569 out of 6,014).

Race and Ethnicity: White: 95.4%; Black or African American: 79.4%; Asian: 95.8%; Hispanic or Latino: 88.1%; Two or More Races: 86.9%

Only 42.9% of third grade students in Dane County are reading at grade level proficiency.¹⁶

The Sylvee could be filled 1.2 times with Dane County third graders who are reading at "basic" or "below basic" levels.¹⁷

The reading proficiency rate is significantly lower for Black students (8.3%), Hispanic/Latino students (19.2%), and economically disadvantaged students (those living at or below 185% FPL) (14.5%).¹⁸

7.5% of babies are born at low birthweight in Dane County.¹⁹

By Race and Ethnicity: White: 6.4%; Black or African American: 14.6%; Hispanic or Latino: 6.7%; Laotian or Hmong: 8.6%; Two or More Races: 11.2%

Nearly 1 in 25 people do not have health insurance in Dane County (3.8%, or 20,729 of 551,592).²⁰

By Race and Ethnicity: White: 3%; Black or African American: 7.5%; American Indian and Alaska Native: 8.6%; Asian: 4.2%; Two or More Races: 6.5%; Hispanic or Latino: 13.5%

Life expectancy is nearly 10 years shorter for Black/African American and American Indian/Alaska Native people than the overall average.²¹

Overall: 81.4 years; **By Race and Ethnicity:** American Indian or Alaska Native: 72.7 years; Asian: 88.6 years; Black or African American: 72.6 years; Hispanic or Latino: 85.4 years; White: 81.7 years



The Power of Many. Working for All.



www.unitedwaydaneconomy.org • 2059 Atwood Avenue, Madison, WI 53704 • (608) 246-4350

United Way of Dane County Community Level Data Footnotes

- 1** If you need more detailed data points than included in this document, please refer to the full Community Level data document or reach out to Lindsey (lindsey.gearin@uwdc.org).
- 2** 2017-2021 US Census American Community Survey, 5 year estimates, Table S0101.
- 3** 2017-2021 US Census American Community Survey, 5 year estimates, Table S1701; Poverty defined as below 100% of the Federal Poverty Level.
- 4** Based on a capacity of 80,321
- 5** 2017-2021 US Census American Community Survey, 5 year estimates, Table S1701.
- 6** 2017-2021 US Census American Community Survey, 5 year estimates, Table S1701.
- 7** 2017-2021 US Census American Community Survey, 5 year estimates, Table B17001A, B17001B.
- 8** 2017-2021 US Census American Community Survey, 5 year estimates, Table B17001A, B17001B, B17001C, B17001D, B17001E, B17001F, B17001G, B17001I. Data not available for American Indian and Alaska Native people and Native Hawaiian or Other Pacific Islander people due to privacy protections.
- 9** 2017-2021 US Census American Community Survey, 5 year estimates, Table S1702. For the purposes of this data point, a family with children is defined as a household with related children of the householder. The Federal Poverty Line for a household of four people was \$26,500 in 2021.
- 10** 2017-2021 US Census American Community Survey, 5 year estimates, Table S1702. For the purposes of this data point, a family with children is defined as a household with related children of the householder, and the race or ethnicity reported is that of the householder.
- 11** 2017-2021 US Census American Community Survey, 5 year estimates, Table S2301.
- 12** Unemployment was 4.4% in 2016. 2012-2016; US Census American Community Survey, 5 year estimates, Table S2301.
- 13** 2017-2021 US Census American Community Survey, 5 year estimates, Table S2301.
- 14** Annual Point in Time Count conducted by the Homeless Services Consortium of Dane County (January 26, 2022), https://www.danecountyhomeless.org/_files/ugd/73dee7_de5daeb82a9e4da986146958ebb81c36.pdf.
- 15** 2020-2021 School Year, Department of Public Instruction WiseDash, HS Completion for 6 year (2019) cohort, calculated by UWDC, <https://wisedash.dpi.wi.gov/Dashboard/dashboard/17880>;
- 16** 2021-2022 School Year, Department of Public Instruction WiseDash, Forward Test (English Language Arts), calculated by UWDC, <https://wisedash.dpi.wi.gov/Dashboard/dashboard/19948>.
- 17** Based on a capacity of 2,500.
- 18** 2021-2022 School Year, Department of Public Instruction WiseDash, Forward Test (English Language Arts), calculated by UWDC, <https://wisedash.dpi.wi.gov/Dashboard/dashboard/19948>.
- 19** HealthyDane.org, Babies with Low Birthweight (2020), source data from Wisconsin Department of Health Services.
- 20** 2017-2021 US Census American Community Survey, 5 year estimates, Table S2701; as a percentage of the total "civilian non-institutionalized population."
- 21** HealthyDane.org, Life Expectancy (2018-2020), source data from Conduent Healthy Communities Institute.



www.unitedwaydaneconomy.org • 2059 Atwood Avenue, Madison, WI 53704 • (608) 246-4350

Impact

Strategic Priority: *Be a change catalyst to establish and lead collective impact to advance family well-being in Dane County.*

United Way of Dane County is the intersection where the community meets to change lives.

We are uniquely positioned as a change catalyst to establish and lead “collective impact” to advance family well-being in Dane County. United Way mobilizes the caring power of local nonprofits, businesses, community leaders, donors, volunteers and families to address big-picture issues no one person or organization can solve alone.

Our goal is to measurably increase individual and family well-being so that every person in Dane County leads a healthy, thriving and secure life that meets their own defined goals, and that is not impacted by experiences of systemic racism, discrimination and poverty. Because family well-being is community well-being.

We work toward this goal using an approach that holistically addresses the needs of all members within a family (multigenerational) and removes racial and other inequities. We work in a consistent way to mobilize resources and create needed change by:

- seeing the whole problem, so we connect all the pieces to solve things in ways that will last.
- rallying the most impactful resources and deploying them in ways that meaningfully affect our neighbors.
- being on the front lines of resolving inequity in Dane County.
- holding ourselves, and our partners, accountable for effective use of resources and measurable results.

United Way’s **Plan for Community Well-Being** (2022) embraces collective impact and focuses on strategies with the highest opportunities for meaningful and measurable impact, bringing people and systems together in a structured way to achieve social change.

Strategic goals are identified for Early Childhood, Education, Income and Health – the building blocks of advancing well-being for families.

- **Early Childhood** – Build family well-being by intentionally and simultaneously working with children under five and the adults in their lives together.
- **Education** – All students succeed academically, and graduate high school prepared for higher education, career and community.
- **Income** – More people are on pathways out of poverty, ending family homelessness.
- **Health** – A Dane County absent of racial health disparities in physical and mental health, emphasizing a trauma-informed approach.

Goal 1: Engage in sustainable long-term work on systems change with a clear focus on education, income, health and early childhood (2Gen).

A. Plan for Community Well-Being Snapshots

The next several pages present our 2023 Impact Snapshots. Each highlights the goals and strategies that are the focus of the Community Solutions Teams' work, investments made in community partners' programs and results, and stories growing out of that work. 211 is highlighted as well.

Our Impact: **The Plan for Community Well-Being**

Imagine a future where families are healthy and strong, where all kids learn and succeed and where everyone's needs are met. That's what we dream of here at United Way of Dane County. And we believe we can get there through our Plan for Community Well-Being – a plan built with our community, for our community.

This vision for a brighter future focuses on increasing individual and family well-being so that everyone in Dane County can lead healthy, successful and secure lives – making our entire community stronger and better positioned to thrive. Our plan includes strategies around the building blocks of well-being:

Early Childhood • Education • Income • Health

We know there are a lot of great services and programs in our community. But we're better together! That's why we partner with hundreds of local nonprofit programs and organizations to most effectively address Dane County's most pressing needs. Through these collaborations, we aim to create a more cohesive nonprofit ecosystem and achieve greater results, together.

United Way Mobilizes the Caring Power of the Community *to Create Lasting Change*

73,309 *Dane County Neighbors
Supported in 2023*

Early Childhood

Goal: Build family well-being by intentionally and simultaneously working with children under five and the adults in their lives together.

Research and community input consistently show that coordinated, holistic programs and policies that help meet children’s and caregivers’ goals simultaneously lead to increased family stability and mobility from poverty – leading to greater success across generations. At United Way, we bring together nonprofits and invest in multi-generational collaborations to meet families where they’re at, providing holistic support and access to resources that’ll help them thrive.

Measure: Child poverty (ages 0-5) in Dane County.



“
 RISE Wisconsin is very grateful for the work we’ve done with United Way. With their support, we’ve really been able to walk alongside families in helping with early childhood development education, early learning and providing families with stability. Whether they need access to childcare so they can go to work, or help with food assistance, it really takes a village. And United Way allows us to be part of that village.

– Maggie Waid, Director of Development, RISE Wisconsin



6,125 *Dane County Neighbors Supported in 2023*

Home Visiting: Creating Connections with Families with Young Children.

United Way invests in home-visiting programs for young families, including Welcome Baby and Beyond and Parent Child+ (at RISE Wisconsin), and KinderReady (at Children's Service Society). Through these programs, family support specialists meet with parents/caregivers and their children at home to focus parent support, social connections and resource connections.

In 2023, 200 children and their families participated in weekly or monthly visits depending on their unique needs. And, in order to ensure each family has what they need to be successful, we work to connect families to additional resources to holistically meet their needs and goals – including housing and employment support, mental health support and more.

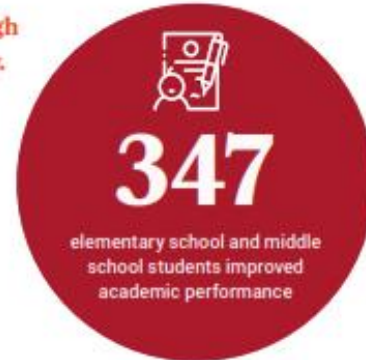


Education

Goal: All students succeed academically and graduate high school prepared for higher education, career and community.

Individuals who finish high school are more likely to have the skills required to be successful in postsecondary education, an increasingly complicated job market and society. And adults with higher education levels are more likely to gain employment with family-sustaining wages. At United Way, we invest in nonprofits and programs that help prepare youth for the classroom and life beyond through mentorship, tutoring and social-emotional learning.

Measure: Graduation rate in Dane County.



Schools of Hope (Elementary Reading) and Achievement Connections (High School Math)

The Elementary Schools of Hope and Achievement Connections AmeriCorps Programs are dynamic community partnerships which have developed an evidence-based model of tutoring intervention fueled by impassioned AmeriCorps members and committed community volunteers. Both are unique collaborations. Elementary Schools of Hope is a collaboration with United Way of Dane County, AmeriCorps and the Madison Metropolitan School District. Achievement Connections is a partnership between United Way of Dane County, the Madison Metropolitan School District, the Middleton-Cross Plains Area School District and the UW-Madison Morgridge Center for Public Service.



Elementary Schools of Hope's mission is to provide literacy tutoring support to improve the academic achievement of kindergarten through fifth grade students. While Achievement Connections mobilizes AmeriCorps members and the community to support student achievement in Algebra and Geometry.

For the first time since the pandemic, AmeriCorps members and volunteers were back in school buildings in 2023! And **303 elementary students were tutored by nine AmeriCorps members and 20 community volunteers in the 2023 school year.** Additionally, **257 high school students were tutored by five AmeriCorps members and 111 community volunteers in the 2023 school year** through the Achievement Connections program.



From Struggling Reader to Published Writer:

When Camila, a second-language English speaker, first joined our partners at Simpson Street Free Press (SSFP), she struggled with reading and writing. Shy about her lack of school-day success, she never asked for help. SSFP’s literary specialists assessed Camila’s reading comprehension and used Science of Reading principles and 1:1 tutoring to help build her skills – and her confidence along the way. Over the course of just a couple of years, Camila went from struggling reader to published writer! The Cap Times recently ran a piece she wrote about the “I Have a Dream” scholarship event hosted by Women in Focus last year.



6,125 *Dane County Neighbors Supported in 2023*

“

Partnering with United Way has allowed the Middleton Youth Center to serve more students in our free after school and summer programs. The Youth Center is an important place of connection, belonging, and opportunity for our students. We are so grateful that now, more students have access to the support and activities that allow them to thrive.

– Gabrielle Hinahara, Director of Middleton Youth Center

”



Income



Goal: More people are on pathways out of poverty, ending family homelessness.

When more individuals have jobs earning family-sustaining wages and safe and affordable housing, they are less stressed and more able to provide for themselves and their families – better positioning the entire community and our economy to thrive. At United Way, we’re invested in local nonprofits and programs that help families get what they need to be economically stable through job training, homelessness prevention and affordable housing.

Measure: People living above 200% of the Federal Poverty Level in Dane County.

Addressing Family Homelessness

At United Way, we believe everyone deserves a place of their own to call home. But finding safe and affordable housing in Dane County isn't always easy. By investing in programs that help families avoid eviction and rapidly re-house those that do become homeless, we're helping parents/caregivers and their children build a solid foundation for success across all areas of life. **Through our Reducing School Mobility Collaborative** – a program focused on keeping families in their homes and kids attending the same school, funded, in part, by The Siemer Institute – **we were able to help 174 families in 2023 at risk of losing their housing with financial assistance and individualized case management** with our partners at Community Action Coalition for South Central Wisconsin (CAC), Cultural Practices that are Relevant, Stoughton Area Resource Team (START) and WayForward Resources.

Journey Home

Led with our partners at JustDane, Journey Home works to reduce recidivism (return to prison) and creates a stronger community. This is accomplished by helping recently-incarcerated individuals find housing, employment, support and treatment as well as transportation and education. **In 2023, resource specialists met one-on-one with 446 individuals, getting them the support and resources they need to thrive in our community.**



21,630 *Dane County Neighbors Supported in 2023*



HIRE Initiative:

In 2013, we launched our HIRE Initiative – a program that focuses on helping adults prepare for and find steady employment. We partner with six local nonprofits and 50 local employers through this initiative and, in 2023, we helped 613 people find new or better employment – 320 of those landing in jobs paying \$18+/hour.

Mike was one of those people.



When Mike was looking for a new career path, he turned to our HIRE Initiative. Through the support of our partners at the Latino Academy, he began pursuing his Commercial Driver’s License (CDL), knowing it would lead to a well-paying career. This collaboration provided Mike with financial support for his CDL training, covering costs and furnishing resources for study materials. Once he received his CDL – after training with enthusiasm and determination – we helped to place him at a job earning \$28/hour, plus great benefits.



I really respect United Way’s commitment to the work we’re all doing – because we need that umbrella organization that pulls us together. Together, we can align with a greater vision for community and make greater impact.

– Karen Menéndez Collier, Executive Director, Centro Hispano.

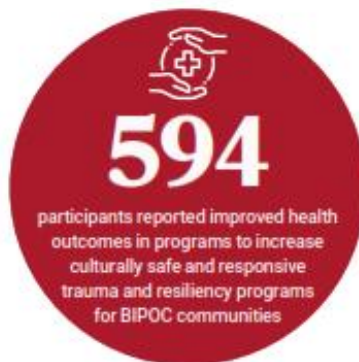


Health

Goal: A Dane County absent of racial health disparities in physical and mental health, emphasizing a trauma-informed approach.

While Dane County remains a top place to live, raise a family and retire, for our BIPOC neighbors (including Black, Indigenous, Latinx, Southeast Asian and People of Color), education, income and health inequities and disparities remain consistent. Unfortunately, in Dane County the color of your skin and the ZIP code in which you live have a significant impact on your quality of life, life expectancy and a wide range of health outcomes. To help address and dismantle the existing inequities, United Way invests in local nonprofits and programs that aim to reduce health disparities faced by our BIPOC community members.

Measure: Life expectancy in Dane County.



Saving our Babies Through ConnectRx

The ConnectRx Wisconsin program is an initiative of the Dane County Health Council (DCHC), and United Way of Dane County is a proud partner of this large collaborative. The program is designed to improve birthing outcomes for Black families by screening for the social determinants of health among Black birthing people in Dane County. Those who enroll in the program are supported with community health workers, referrals to services and doula care.

In 2023, the program received 469 referrals and served 202 patients!

20,030 *Dane County Neighbors Supported in 2023*



HealthConnect

At United Way of Dane County, we believe cost should not prevent you from getting the health care you need. That's why we're helping lower income individuals and families who make too much to qualify for BadgerCare purchase insurance through healthcare.gov via our HealthConnect Premium Assistance Program.

In 2023, \$1.05 million was invested into the HealthConnect program – allowing us to pay insurance premiums for 578 people through 492 plans. Helping more individuals and families across Dane County lead healthier, happier lives.



“
Over the last several years, HealthConnect made it possible for me to afford individual insurance through the Marketplace, and I'm incredibly grateful for that! United Way gave me the support and care I needed.
”
– Yara, HealthConnect participant

United Way 211

United Way 211 is here to provide 24/7 live, local assistance to every person in our community who needs it. In times of crisis, navigating resources and solutions can be difficult – but we're here to help.

From finding food to paying rent or connecting to addiction treatment (and so much more) 211 can help. Our specialists listen, offer comfort, hope and solutions in times of crisis. 211 hosts the most comprehensive health and human services database in Dane County and provides real-time, up-to-date information on needs.



Five years ago, Lydia had trouble finding housing she could afford. Not sure where to turn, she called 211 and our specialist connected her to the resources she needed. Lydia found stable housing and was able to deal with some of the trauma she'd experienced in her previous living situation. Thanks to that support, Lydia has spent the last few years focused on what matters most – bettering her life for herself and her kids. She worked hard to receive her GED and is now a full-time student at Madison College!

“

We are so fortunate to be one of the partner agencies housing one of the new 211 kiosks. With it being so user-friendly, a wide range of individuals with varying technology backgrounds will be able to use it. Additionally, it allows a bit of discretion for users by bypassing the need to ask for help in-person, which is a barrier in itself.

– Arturo Ambriz, Executive Director, Lussier Community Education Center

”



211 Activities in 2023:



23,695 *Dane County Neighbors Supported in 2023*

211 Wisconsin App – Community Resources at Your Fingertips

In October of 2023, we announced the launch of our new 211 Wisconsin App! This app was developed by us at United Way of Dane County to broaden awareness of and access to services in our community. The app can be downloaded to your mobile device or, for those who do not have access to a mobile device, we've placed kiosks around the county to help make sure 211 services are accessible for everyone.



B. Update on Housing Delegation

In 2023 we convened a Delegation to update our strategies focused on the housing needs of families in Dane County. Led by Kurk Paulsen (UW Madison) and Pastor Marcus Allen (Mt. Zion Baptist Church), the delegation gathered community and key stakeholders to provide insight on ways to respond to the housing needs in Dane County. We value the contribution of the committee of volunteers, experts within the industry or with lived experience, who served on a year-long committee and advised these strategies through a process of reflecting and reviewing data, research and engaging in community listening to help United Way update these strategies to reduce family homelessness.

The Family Homelessness and Affordable Housing strategies ensure that families can maintain housing and avoid evictions as they work toward financial security. To achieve this vision, United Way of Dane County will convene resources, collaborations and partnerships for the following strategies over the next five years (2024-2029).

- **STRATEGY 1: Invest in and support Quality Case Management:** Case Management is an overarching term that describes staff who support individuals and families with resource navigation, access to resources and planning to meet the family's goals. Case Management is an overarching supporting strategy that directly impacts the success of the other strategies.
 - a. Increase funding to expand capacity to provide case management to families. This type of support works. More families need comprehensive support, but the staff capacity is not available across Dane County to support this critical need.
 - b. Invest in training and professional development for staff with this expertise to support families.
 - c. Increase capacity for Case Management at new housing developments being built in our community.
 - d. Increase financial resources that support the community of providers of Case Management in collaboration with the partners at Cities/Dane County and State of Wisconsin.
 - e. Increase equitable access to Case Management services for families by increasing Case Manager's capacity and increasing awareness of Case Management services.
- **STRATEGY 2: Increase Investments in Housing First Programs:** Housing First Programs are strategic partnerships that work to help families into housing quickly after they become homeless. Local programs have historically seen an 83% success rate of families remaining stably housed for one year over the last 15 years.
 - a. Increase or expand capacity for programs that provide Rapid Rehousing support, financial and thorough case management and housing locator support services.
 - b. Review capacity and policies to increase equitable access to these programs to

- strengthen this work.
- c. Increase the education and awareness of Housing First as a strategy in the community. Emphasize the importance of case management/support for families as a key driver that needs to be invested in to get the outcomes that families and our community are striving for.
 - d. Support policy changes and trainings that result in more equitable access to housing with local landlords and property managers.
- **STRATEGY 3: Invest in Eviction Prevention:** Eviction Prevention is supporting families through rental financial assistance, financial planning and budgeting through connections with a case Manager and plan, so families remain stably housed. Our goal is that 87% of families receiving eviction prevention support will remain stably housed after one year.
 - a. Develop and adopt a community-wide best practice and definition of Eviction Prevention program delivery standards and goals. Currently, eviction prevention implementation varies by program.
 - b. Focus our investments on Eviction Prevention, that includes Case Management and is flexible enough to be able to meet the needs of every family.
 - c. Recognize in successful outcome measures that Eviction Prevention also includes planned moves for a family when the current living conditions are not conducive to the family's stability.
 - d. Early Identification and Prevention: Work with the system of housing providers, landlords and schools on methods to identify families that are at risk of becoming homeless.
 - e. Provide more equitable access to information and resources for families in Dane County.
 - **STRATEGY 4: Invest in Financial Coaching:** Financial Coaching assists clients with budgeting, money management and other skills that help them create a financial plan toward financial security as defined by the client. We are especially focused on partnering with BIPOC-led organizations already providing financial coaching programming and support services.
 - a. Increase financial investments, specifically to BIPOC-led organizations already providing these services.
 - b. Look into increasing the peer support model in Dane County. Explore whether this will increase the opportunities for clients to learn from each other's experiences around financial planning and budgeting.
 - c. Explore developing a Payee Protection Plan, programs where a church or other entity oversees payments of rent, mortgage etc., to see if this could help families who struggle in this area.
 - **STRATEGY 5: Invest in Home Ownership Programs:** A focus on home ownership is an investment in building generational wealth. Successful home ownership programs include case management, readiness assessments, financial coaching and removing barriers to

maintaining your home once you own the home.

- a. Expand our current home ownership investments to include support for home ownership programs for women of color who have children.
- b. Develop and adopt a standardized readiness assessment to ensure women of color are prepared for home ownership.
- c. Provide downpayment assistance and/or closing costs as needed to support wealth development for women of color.
- d. Provide home ownership maintenance loans for women of color.

The Women and Wealth Subcommittee of the Income CST spent some time educating themselves on the current landscape of housing in Dane County. The committee decided to focus on Small Business Supports for Women for 2024's RFP and on expanding home ownership when the housing market improves.

C. Update on Early Childhood Delegation

In 2023, we convened a delegation around early childhood chaired by Dr. Jack Daniels III (Madison College) and Matricia Patterson (Supporting Families Together Association). The Delegation's discussion and path to recommendations has considered family well-being and the multigenerational approach needed to influence child outcomes for families experiencing poverty. The wide-ranging intersectional focus on the needs of children under the age of five is aligned to the shift United Way of Dane County continues to take in providing solutions that are responsive, holistic in meeting families' needs and ensuring our entire community is stronger and better positioned to thrive.

The Delegation discussions centered around strengthening systems, not silos, so families can access the needed resources to support their self-defined goals and generational well-being. With a focus on the holistic and systemic nature of family needs, the discussions further reflect the importance of integrating our strategic efforts across the Plan for Community Well-Being, with the awareness that each building block – early childhood, education, income and health – all work together in a holistic manner. Our updated strategies reflect this renewed focus:

- **STRATEGY 1: Increase access to high quality, culturally relevant early care and education experiences**, particularly for BIPOC families experiencing poverty.
 - a. Childcare – group centers, in-home family and family/friend/neighbor care
 - b. Support high quality home visiting models and programs
 - c. Family Resource Centers
 - d. Parent-Child Community Groups

- **STRATEGY 2: Build caregivers’** (parents and early care and education teachers) **understanding of healthy child development** through family and community outreach (outside of childcare, i.e. home visiting).
 - a. Developmental screenings inclusive of social emotional screenings and increasing access to services.
 - b. Increase awareness of supportive services and service providers in the community.
 - c. Best practice childcare teacher/professional training.
 - d. Educate and provide resources about child development
- **STRATEGY 3: Build connections to community resources and remove barriers to accessing family support services** needed to overcome the experience of poverty (collective impact – follows strategies for other areas of focus within the Plan for Community Well-Being).
 - a. Financial security support and programs that support housing stability, career pathway development, education and upskilling.
 - b. Mental health resources for parents and children
 - c. Systemic changes in how programs are delivered in a team approach to meet family’s needs, versus families needing to access all resources individually and independently.
- **STRATEGY 4: Support/Influence policy changes** that will deepen early learning and development outcomes for children (aligned to the Plan for Community Well-Being).
 - a. Educate the community and advocate for structural changes to financial investments in childcare: locally, county and state-wide.
 - b. Work with UWDC Public Policy Committee to develop a specific set of outcomes and goals related to supporting families experiencing poverty with children under the age of five in Dane County.
 - c. Publicly support statewide collaboratives that support increasing access and public funding for solutions to the childcare systemic changes needed.

The delegation also recommended adding 3rd grade reading to the collection of metrics we are monitoring at a community level to represent outcomes in this impact area with a reflection on family well-being overall.

D. Update on Strategic Collaborations Led by UWDC

We are proud of the work accomplished through our strategic grant-funded partnerships, which mobilize the strengths of different partners in our community toward a collective goal. **We play an important role in these collective impact projects by bringing partners together and building alignment around a shared vision to drive toward strong positive outcomes in our community.**

1. Schools of Hope

For the first time since the pandemic, AmeriCorps members and community volunteers were back in school buildings to start the school year. However, school staff shortages significantly impacted the program, especially in student identification for tutoring, literacy training in alignment with the new curriculum and AmeriCorps member support within the school. AmeriCorps recruitment continues to be a challenge locally and nation-wide, which impacts the number of schools and students served. Despite these challenges, 303 elementary students were tutored by nine AmeriCorps members and 20 community volunteers in the 2022-2023 school year.

2. Achievement Connections

In the wake of the pandemic, AmeriCorps members and community volunteers returned to serving schools in person. In addition to supporting the challenges faced by schools and students, Achievement Connections also went through a staff transition at the Program Director position. AmeriCorps member recruitment was impacted by the local and national decline in AmeriCorps applicants but saw a meaningful increase in applications received in the latter part of 2023. Lower AmeriCorps enrollment in 2022-2023, along with significant post-pandemic barriers to math education and instruction, created obstacles for the total number of students served. Nonetheless, 257 high school students were tutored by five AmeriCorps members and 111 volunteers in the 2022-2023 school year.

3. HealthConnect

With a generous grant of \$1,050,000 for 2023, the HealthConnect program covered 492 plans which provided health insurance coverage to 578 people. Quartz continues to be the largest insurer within HealthConnect, with 19% of plans under Dean, 18% under GHC and 63% under Quartz. The return on investment generated by Advanced Premium Tax Credits for new enrollees in 2023 was \$2.17; this is lower than it was in 2020-2022 when tax credits were expanded due to pandemic era ACA marketplace policies but is anticipated to rise due to Medicaid Unwinding dis-enrollments. During Medicaid Unwinding, which began in early 2023, some individuals lost their current Medicaid coverage and needed to transition to other health insurance. HealthConnect has been a critical lifeline for low-income members of the Dane County community who could not afford the high cost of a health insurance plan and were left without insurance. The following email message from a former HealthConnect member is a testament of the need for and benefits of the HealthConnect program:

Dear folks at HealthConnect and United Way,

I wanted to let you know that I recently got married, so I reported a change of life and terminated my individual insurance plan through the Health Care Marketplace and verified that my individual plan ended with Quartz on 1/31/24. I don't believe that anything further needs to be done, but I wanted to inform you of this change as well.

Over the last several years, HealthConnect made it possible for me to afford individual insurance through the Marketplace, and I am incredibly grateful to you for that. I want to say thank you for your support and for helping me get the coverage to get the care I've needed. As I move onto this new chapter in my life, I will not forget this, and I hope to pay it forward one day - to help others as you've helped me.

Thank you for all that you've done - and all that you do. Please keep up the great work.

4. Saving our Babies (ConnectRx Wisconsin)

The ConnectRx Wisconsin program is an initiative of the Dane County Health Council (DCHC) which is, in part, funded by three grants secured and led by United Way – the Wisconsin Partnership Program (WPP) Community, Schmidt Futures and Wisconsin Department of Administration (DOA). The program is designed to improve birthing outcomes for Black families by screening for the social determinants of health among Black birthing people in Dane County; those who enroll in the program are supported with community health workers, referrals to services and doula care. In 2023, the second year of the ConnectRx grant, the program received 469 referrals (368 of which were unduplicated) and served 202 patients. Participants received over 1,400 referrals to community-based organizations and over 100 referrals to doula support.

A significant focus of our work in 2023 was the development and refining of our collaborative structure, operational infrastructure and clarification of roles among the DCHC and partners who collectively implement ConnectRx Wisconsin and its shared community-clinic leadership model. Additionally, DCHC and partners are actively working on making the program sustainable. Challenges include the recruitment and retainment of community health workers and doulas.

5. Rapid Rehousing, Family Housing Stability, and Food Programs (Predolin)

The Henry J. Predolin Foundation grant to support the Rapid Rehousing program in 2023 served 42 families, including 111 children. Through the work of case managers at YWCA Madison, The Road Home and the Salvation Army of Dane County, these formerly homeless families moved into apartments of their own and were connected to various community resources such as employment training, access to food and children's enrichment opportunities. The Predolin grant to support the Family Housing Stability program served 33 families, including 80 children in 2023. Families experiencing housing instability avoided homelessness through the support of a YWCA Madison case manager and connection to resources to ensure they remained stably housed.

The Harvest Snack program, funded by a grant from Predolin Foundation, served 1,882 children across 12 different program sites. The program, implemented by Second Harvest Foodbank, succeeded in providing healthy snacks and meals – with an emphasis on fresh fruits, vegetables and dairy products – to these children who typically do not have regular access to nutritious foods. The Rural Food Delivery program, implemented by Community Action Coalition for South Central Wisconsin, served 14,000 children with support from a Predolin Foundation grant. These children and their families received fresh dairy products delivered to rural food pantries throughout Dane County. The Sun Prairie Community Schools Food Pantries program, implemented through a partnership between Sunshine Place and the Sun Prairie School District, received funding from Predolin Foundation to support a vital food coordinator position. This position is responsible for coordinating the stocking of food pantries located inside Sun Prairie’s eight community schools with healthy foods. The on-site school food pantries served nearly 1,400 students eligible for free or reduced meals in 2023.

6. Reducing School Mobility (Siemer)

The Reducing School Mobility Collaborative has a dual goal of helping families achieve stable housing while ensuring their children remain in their school of origin to better succeed academically. The Siemer Institute awarded United Way of Dane County \$150,000 in 2023 – adding to their 10 years of support for Reducing School Mobility, with funds granted totaling \$850,000. United Way matches the Siemer grant 2:1 with Vision Council investments and grants raised from private and corporate foundations. Our partner agencies in the collaborative are Community Action Coalition for South Central Wisconsin (CAC), Cultural Practices that are Relevant, Stoughton Area Resource Team (START), and WayForward Resources. Reducing School Mobility serves families in the Madison Metropolitan, Middleton-Cross Plains, Stoughton Area, and Sun Prairie school districts.

In 2023, the program had the following results:

- 174 families at risk of losing their housing received financial assistance combined with individualized case management.
- 99% of children served avoided disruptive school moves.
- 77% of families maintained stable housing.
- 60% of families achieved an increase in income due to higher earnings and/or benefits.

7. Results from BYFY

The By Youth for Youth (BYFY) committee, a collaborative program through the Dane County Youth Commission, United Way of Dane County, the City of Madison Community Development Division and UW-Extension Dane County’s Institute of Positive Youth Development awarded \$36,447 to 13 local youth programs and projects. BYFY’s funding priorities for 2023 were focused on mental and physical health, school programming and student support, youth experiencing poverty, youth experiencing food insecurity, youth experiencing homelessness, climate change, STEM (science,

technology, engineering, mathematics) and immigration. This year's group of teen leaders was comprised of 18 youth from nine different Dane County high schools.

8. Results from Public Policy Committee

UWDC's Public Policy Committee is a standing committee of the Board of Directors, comprised of 11 volunteers. The committee was led in 2023 by Board member Adam Stevenson (UW Madison), and each CST has at least one representative. The committee met five times in 2023 and decided to focus on local public policy advocacy rather than the state or federal levels for at least the next year.

The members spent the first quarter of 2023 designing a pilot project aimed at increasing community outreach and building relationships with local elected officials. The pilot launched in April with an email, along with UWDC's Public Policy Agenda and Plan for Community Well-Being, sent to 100+ election candidates on the spring ballot. These candidates included individuals running for school boards, leadership of Dane County villages, towns, and cities and Madison City Council. Seven responses were received in phase one of the project; six responses were recorded for phase two, including City of Madison alders and Dane County supervisors already in office.

The remainder of the year, the Public Policy Committee worked to revise the UWDC Policy agenda for 2024-2025. This included sharing the draft agenda with each CST for feedback and aligning the focus and language with the Plan for Community Well-Being. The 2024-2025 Public Policy Agenda was approved by the UWDC Board in January 2024 (included as Appendix 3).

Goal 2: Model equitable, anti-racist practices through all work: investments, partnerships, innovation, public policy advocacy, data and research and connection to resources.

A. Equitable Grantmaking Process

We spent much of 2022 and 2023 in conversation with United Way of Dane County's stakeholders to clarify key areas of potential for the investment process. We convened an Equitable Grantmaking Advisory Committee in the spring chaired by Shiva Bidar-Sielaff (UW Health) and Baltazar De Anda Santana (Latino Academy of Workforce Development) and consisting of community leaders, other local funders, United Way Staff and Agency nonprofit partners. We then established an internal team to work to create a recommendation of changes to our process based on that Committee's initial direction.

We recommended creating three processes instead of one and doing so with the intentional focus on equity, and propose making these changes over the course of the next 3 years:

- **Stage 1:** In 2024, develop Impact Grant Criteria and Release an RFP for Impact Grants, agency level grants aligned to the Plan for Community Well-Being (about \$2-3 million). In 2024, work with Community Engagement and Inclusion committee to refine the

Microgrant process, invest \$25,000 and by 2025 create the transformation plan to the “Seed Grants” model to improve the connection to United Way with partners who receive grants in this category.

- **Stage 2:** In 2024, Partnerships in this category of investments do not need to re-apply. They will receive a funding extension of up to two years, renewable every year pending Campaign results (which results in a five-year total commitment from United Way of Dane County, from 2022-2026). In 2024 we will continue to focus on evaluating the effectiveness of these community partnerships and defining what they will be in the next iteration to clearly update partners on expectations, commitments they would make and allow for them to re-engage with these at the time of open application. The next investments in these will be made in 2026 for 2027.

New Language	Old Language	What’s Different?
“Getting to Know You” or “Seed Grants”	Microgrants	<ul style="list-style-type: none"> • Increased relationship building with Community Impact to align with trust-based model
Collective Impact Partnerships (trust-based philosophy)	Signature Initiatives	<ul style="list-style-type: none"> • Further evaluate effectiveness and alignment to the Plan for Community Well-Being. • Program specific to align with UWDC led collaborations or partnership where UWDC has a distinct role in service provision. These do not re-apply in 2024 for FY2025. While we undergo the process of re-evaluating and defining these. (Stage Two) • New investments for these planned for 2027.
Impact Grants: trust-based approach for remaining dollars	Agencies aligned to the Plan for Community Well-Being Strategies and Vision	<ul style="list-style-type: none"> • Remove many reporting and application requirements/barriers. • Open RFP process in 2024 for FY2025. • Investments aligned to the Plan for Community Well-Being (multigenerational, holistic and supporting the varying layers of a family’s needs) and to a strategy (or strategies) under one of our building block areas

The process changes that we will implement over the next year will include shifting our reporting processes to prioritize self-reflection, emergent learning and the ways in which we think about “accountability” to and with our grantee partners. We know we can be nimbler and more responsive to nonprofits’ needs, which are serving families’ needs, and that we can do so in a trust-based

approach that gives flexibility but is rooted in guideposts that keep alignment to our community created mission and outcomes.

B. Micro-Investments Process

United Way of Dane County's Micro-Investment process was created in 2017 in response to community feedback and board discussions expressing a desire to create a process for organizations – especially small, grassroots organizations that are working to decrease racial disparities – to apply for United Way investments outside of the regular investment process.

In 2023, United Way of Dane County awarded a total of \$25,000 to six local grassroots organizations working to achieve racial equity and/or social justice for Black, Indigenous, Latinx, Southeast Asian or individuals and/or families of color in Dane County. A subcommittee of three volunteers from the Community Engagement Committee (CEC) and Community Impact Advisory Council (CIAC), now Community Engagement Inclusion Committee (CEIC) reviewed 19 applications totaling \$89,300 in requests.

In 2023, to align with our community impact investment strategies, the micro-investment process was staffed by a cross-departmental team. The administrative aspect of the Micro-Investment process was transferred from Community & Corporate Engagement to Community Impact. The engagement process remains part of the CEIC and is staffed by our Stakeholder Engagement Director in CEM.

Goal 3: Cultivate a stronger nonprofit ecosystem through trust-based collaborations to create positive community change.

A. Results from 211

211 hosts the most comprehensive, curated health and human services database in Dane County. We partner with United Way Wisconsin and the seven other 211 call centers in Wisconsin to create a fully integrated statewide system. As part of 211 Wisconsin, we serve callers wherever they are located, with referrals provided through the statewide database shared by all 211 centers in Wisconsin. Additionally, we answer the Wisconsin Addiction and Recovery Helpline (WARH) and provide resources related to addiction and mental health issues.

Dane County residents accounted for 17,173 of the 47,536 calls we received in 2023. Of those calls, 13,174 were from Madison residents. The next highest call volume in our primary service area is from Rock County with 2,890 calls, primarily from Janesville residents. Our combined total time speaking with clients was over 160,800 minutes (2,680 hours). We deliver on the promise to listen, understand, support and find resources for those who need help. That simple mission and deliverable is responsible for a customer satisfaction rating of 89.3%, with over 99% stating they would recommend us to others.

Top Referral Categories

Food pantries	5,302
Rent and security deposit	4,473
Electric service payment	2,099
Community shelters	1,314
Housing search assistance	1,819

We improved the awareness of 211 through internal, external and campaign presentations to raise awareness of the work we do. We did 51 external presentations in 2023, up from 39 in 2022. Part of that outreach increase also involved the rollout of the 211 App mentioned below.

Additional staff were added to our team in 2023 through the ConnectRx grant and a permanent part-time position, which allowed us to make significant progress on curation of the 211 database resources. We continue looking for opportunities to supplement our roster with externally funded positions.

With the Social Determinants of Health (SDoH) framework, the Saving Our Babies initiative and the ConnectRx (CRX) program sponsored by the Dane County Health Council, and our “no wrong door” aspirations, 211 has entered into a new area of service. Where 211 historically worked with people on an anonymous basis, we have now begun gathering limited data from SDoH clients whose referrals need to be tracked to close the loop and ensure that needed services were received.

In 2022, 211 received a generous donation to design and build a mobile, easy to use 211 App. In October 2023, United Way of Dane County rolled out the new 211 Wisconsin App. The App can be downloaded in the iOS and Android App Stores for free by searching “211 Wisconsin”. Since the eight 211 call centers work on the same databases, the App was developed for statewide access, which creates a broader ability for the public to search for resources that they may need.

Top Categories Searched in 211 App

Food	2640	22.6%
Housing & Shelter	2519	21.5%
Clothing & Household Goods	1179	10.1%
Utilities	880	7.5%
Transportation	869	7.4%

The App's goal is to place the basic functionality of the 211 databases into the palm of a user's hands. This way they can browse at their convenience anonymously, or they can register with an email address, which allows them to create a "favorites" list of resources they may use frequently. The App also incorporates the smart device internal GPS capabilities, allowing users to see the resources they are searching for on their phone and to plot a course to get there.

As of February 5, 2024, the App had 1,847 distinct users, who have searched 11,189 categories, 7,673 sub-categories and 8,736 specific services to find resources they needed. The data reveals that most users are in the greater Dane County area, where primary marketing efforts were focused, although it is being used across the state.

The 211 App campaign started with a press conference announcing the launch of the app and kiosk locations throughout Dane County. Other channels used in the campaign included digital media (social and display), print materials and Madison Metro Bus Transit Wraps.



Additionally, we placed 21 kiosks in the community for people who may not have access to smart devices. They were placed in Community and Senior Centers, Food Pantries, Schools, Libraries and Homeless Shelters to make access as easy and convenient as possible.

B. Engagement with Partner Agencies

In 2023, we hosted four agency executive meetings focused on capacity building and volunteer needs and discussion and feedback around the equitable grantmaking process. We also shared tools that agency leaders can use to thank donors and hosted a presentation by TASC on the value offered by flexible spending benefits.

Part of our evolution through the equitable grantmaking process has included shifting towards thinking more about how we can measure and evaluate our work internally. We spent the last quarter of the year developing a revised partnership feedback survey to gather evidence to drive our grantmaking process changes and to get a baseline to understand our relationships with partners. The survey had three areas of focus: 1. Partnerships and the role of UWDC in the nonprofit ecosystem, 2. Trust and equity in our relationships with partners, 3. Opportunities to deepen the work moving forward. Amy Washbush (Associate Director of the Center for Community and Nonprofit Studies at UW Madison) provided feedback during our survey refinement process. We plan on working with Amy and her team to conduct a series of focus groups which will deepen our interpretation of the survey results.

C. Update to Donor Designation Affiliation Process

Donor Designation affiliation allows nonprofit organizations to partner with United Way of Dane County outside of being funded through our investment process. Agencies have viewed this relationship as “value-add fundraising,” as it requires little more than an application but can lead to receiving dollars directed to them by donors through UWDC’s campaign.

However, managing the affiliation process is time-consuming. It also lacks transparency and clarity in purpose and intent that we are now working toward while redesigning our investment process. Most nonprofit organizations (and United Way staff) are unable to explain the differences between receiving funding through the investment process versus Donor Designation affiliation.

A review of our policies and practices was also overdue given the significant changes in the fundraising landscape, technology and United Way organizational structure since Donor Designation affiliation was first developed in 1982. A cross-departmental workgroup (CI, RD, Finance, Marketing) convened to update Donor Designation affiliation policy and practices. The workgroup reviewed existing process documentation and historical internal documents, worked with staff to analyze historic designation data and pledge forms in both the public and private sectors, and held a focus group with four Donor Designation agency partners.

The resulting recommendations brought the Donor Designation process into alignment with our strategic organizational goals of modeling equitable, anti-racist policies and creating trust-based collaborations by:

- Simplifying the definition and practice of Donor Designation affiliation by combining private sector and public sector eligibility; this will reduce multiple types of Donor Designation affiliation down to one, so the public sector is the only explicit opportunity for fundraising-only affiliation.
- Clarifying that Donor Designation agencies will be included only in the public sector campaigns; we will discontinue the practice of listing them in private sector campaigns.

Other tangible and achievable improvements to the management of Donor Designation affiliation for agencies and staff were identified. These include revisiting the terms of contracts with special contract agencies (such as American Heart Association), whose contracts paid out more than the amount designated each year for which data was available and modifying marketing and communications tools and tactics to reflect the changes in our Donor Designations process.

D. Nonprofit Salary Survey

One of the most common requests we receive from nonprofits and their boards is for data about nonprofit staff compensation and retention. Staying on top of marketplace trends and realities is key for nonprofits being able to stay competitive and attract and retain the top talent needed to lead effective and efficient nonprofits that deliver on their missions.

After a three-year hiatus, United Way and QTI Consulting partnered to produce the 2023 Nonprofit Total Rewards Report which benchmarks compensation and benefits in Dane County's nonprofit sector. This collaboration leveraged QTI's staffing expertise and United Way's trusted relationships with nonprofits to procure and analyze data from over 60 nonprofit organizations located in Dane County.

The 2023 Report provides pay and benefit information for 10 benchmark positions commonly found in nonprofit organizations and an overview of regional trends. Attracting the right talent to positions was identified as the top HR challenge.

Financial Health

Strategic Priority: *Be bold in advancing our methods of attracting philanthropic support to grow our impact and be accountable stewards of the resources entrusted to us.*

Financial and human resources fuel our Impact. The results of our annual campaigns are felt by the entire community. Meeting our goal means there is more civic leadership and money to strategically invest in nonprofit partners' programs that work together in ways that we know positively impact our community-level goals. Coming in under our goal means there are less dollars multiplied to help our neighbors lead healthy, thriving lives.

Goal 1: Invest in and value our people and be an inclusion, diversity, equity and access (IDEA) leader.

Successfully creating and leading collective impact requires a diverse workforce that is skilled at breaking down internal and external barriers that stand in the way of long-lasting, permanent change.

A. IDEA Accomplishments

1. Supervisor Feedback Survey

Using the "Start, Stop, Continue" methodology, we solicited staff feedback to foster opportunities for supervisors' growth. The IDEA Committee supported the process by establishing the methodology and questions and the committee encouraged staff feedback. Results were shared with supervisors in December.

2. Vibe Check Survey

The IDEA Committee collaborated with Fun/Wellness Committee members to reevaluate the Pulse Survey process. They reviewed the purpose, timing, questions and expectations of the process. To better represent the purpose of the survey, the Pulse Survey title was changed to Vibe Check. Additionally, the number of pulse surveys was reduced to no more than three times per year (February, June & October), questions were adjusted to address the current state and can be altered based on need. This committee will continue to administer and monitor this process. The first Vibe Check will roll out in February 2024.

3. DEI Position

The DEI position was moved from the Executive Office to Finance & Administration under Human Resources. This transfer was facilitated to focus on our internal DEI efforts/culture, i.e., to guide our

practices, policies and procedures and support positive change in our organizational culture. We then converted the original DEI Director position to a Program Manager, Culture, to support the HR Director's lead in our DEI vision and mission. This will generate additional resources focused on DEI, Culture, staff professional development and training, recruitment and retention.

4. Values and Behavior Standards

Our Values and Behavior Standards formally represent our commitment to Excellent, Innovation, Teamwork, DEI and Wellness. The final version of the Values and Behavior Standards was shared with all staff in March 2023. They were also included in the Mid-Year Reviews and Year-End Reviews in Paylocity. Management meetings included conversations about how to continue to embed values in daily and coaching conversations.

5. Hybrid Meeting Standards

In support of our DEI values, the IDEA Committee developed the UWDC 2023 Internal Hybrid Meeting Standards, a process to ensure hybrid meetings are inclusive. The standards include meeting etiquette and inclusive strategies such as closed captioning, cameras on, scheduling short breaks and tactics to encourage participation and engagement. These standards were shared with all staff during the April Full Staff Meeting.

B. Board Equity Committee

The Board Equity Committee continues to advance its purpose: To support and engage the United Way Board and volunteers with the historical understanding, language and tools necessary to act in ways that drive meaningful change toward a more just community. The goal is to ensure that UWDC effectively functions as a strongly anti-racist organization.

In 2023, this was led by Jacquie Boggess and Fritz Grutzner. Under their leadership, the Committee guided ongoing and intentional work to embed equity into all aspects of United Way's work, including Board, Staff and Volunteer orientation and meetings, and Plan for Community Well-Being impact. Within the organization, the Equity Committee supported Transformational Grantmaking work, understanding funder power, centering families and holistic supports, increasing transparency about types and amounts of grants and working in mutually beneficial partnerships with nonprofit collaborations. The Committee also supported Boardwalk and Community Engagement and Inclusion Committee evolutions to foster deeper leadership development across our community, as well as IDEA projects such as the salary administration guidelines review process and updated supervisor and exit interview feedback mechanisms.

The Summer Learning Collaboratives received high praise, and this year invited CEO Race Conversations participants in learning discussions, as those conversations have ended. The Committee is eager to continue its work and learning in 2024 and plans a joint meeting with the

Nominating and Governance Committee to discuss equitable volunteer recruitment as a 2025 project.

C. Internal Volunteers

In 2023, we mobilized 678 internal volunteers. This group represents the Board and all standing committees that report to the Board, internal working groups, delegations or special committees, and any community-led committees that we play a large role in. These internal volunteers gave over 21,200 hours of time in 2023 to advance our work.

United Way of Dane County Internal Volunteers: 678

People of Color	123	18%
White	277	41%
Unknown	278	41%

**This number represents the total number of volunteer roles, so if a volunteer had more than one role, they are counted more than once.*

In 2023, we were led by a Board of Directors composed of leaders who represented the diversity of our community:

United Way of Dane County Board of Directors: 37

Men	15	Nonprofit Partners, Youth, Community Voice	5
Women	16	Labor	3
People of Color	13	Business	20
Under 40	2	Public/University	11
Over 65	3	Lives or Works Outside of Madison	22

**The gender data in this chart excludes 5 Board members whose data was unknown; the race and ethnicity data in this chart excludes 2 Board members whose data was unknown.*

We also worked with staff to review how we categorize volunteers for the purposes of recognition and tracking during an all-staff training in November. The results from this conversation will be used to solidify our framework for managing volunteer data, allowing us to have greater consistency across departments and years of data.

D. Staff

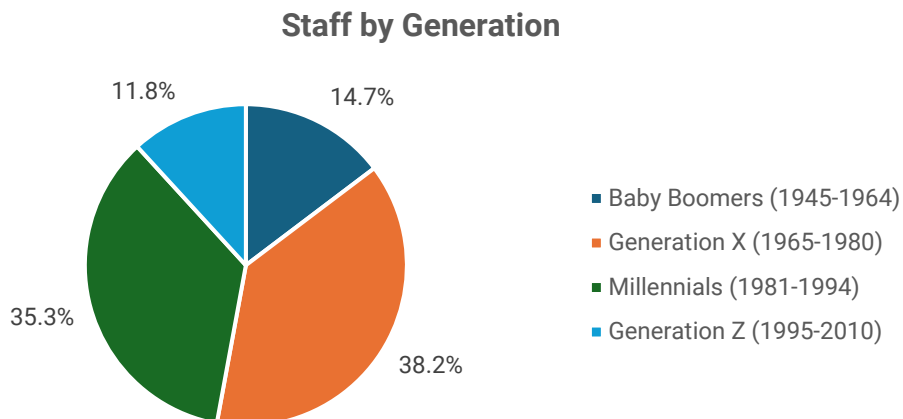
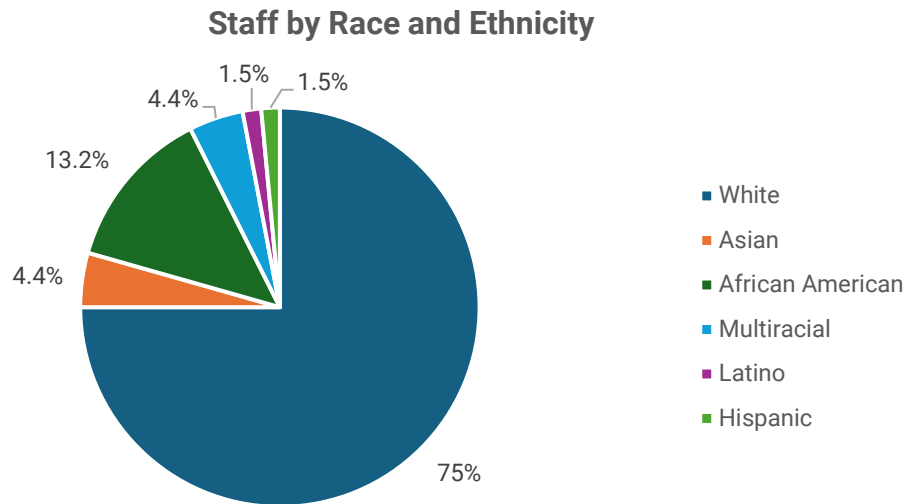
1. Retention

Twelve staff members left the organization in 2023 which is down compared to 16 in 2022. This equates to an 18.7% turnover rate or 81.3% retention rate, which is better than industry benchmarks

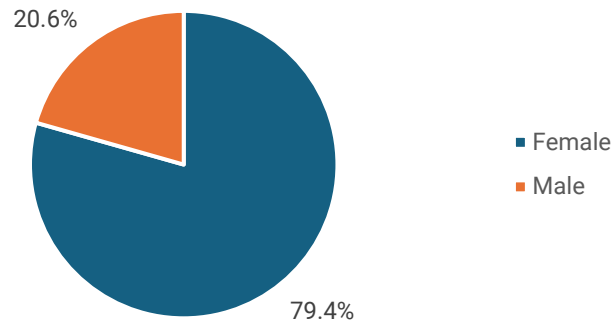
that reported turnover rates exceeding 30% in the relevant NAICS codes for the same period. As a small organization, any turnover significantly impacts staff and that was felt throughout the organization in 2023. The HR team and Hiring Supervisors worked diligently to recruit and hire staff, and we were nearly fully staffed by the end of the year.

2. Staff Diversity

As of December 2023, 68 people were on staff. The HR team continues to monitor staff diversity as we strive for our staff composition to reflect that of the community we serve.



Staff by Gender Identity



E. HR Projects and Accomplishments

1. Hiring Process

At the June 2023 Management Meeting, all Supervisors received the Hiring Guide and Pre-Hire Checklist outlining duties, responsibilities and training during every new hire process. When a vacancy occurs, the hiring manager receives an extra copy of the Hiring Guide/Checklist, refresher training and guidance and support from the HR Team.

2. Onboarding

While most of the work to standardize the onboarding process occurred in 2022, an Onboarding Ad Hoc committee was created to finalize the onboarding process. The final processes will be presented to VPs and CEO in 2024 with rollout to staff and supervisors occurring shortly thereafter.

3. Employee Handbook

We worked to improve the Employee Handbook with input from various sources. At the suggestion of staff, our Legal Holiday Policy was adjusted to reflect our DEI Value and recognition that everyone does not observe the identified legal holidays in the same manner. Staff can now use the 10 days of holiday time throughout the year at their discretion. As an organization, we continue to observe the traditional holidays by closing the building to the public. However, staff may choose to work that day and use the designated time on a different day. This update along with customary handbook updates will be published in Q1 2024.

The Managers Handbook remains in progress and will be distributed in Q2 2024.

4. Compensation and Salary Guidelines

The People, Culture & Rewards Committee (formerly known as the Personnel Committee) reviewed a compensation and salary assessment conducted by QTI. This assessment provided guidance as

we thoughtfully and thoroughly evaluated the organization’s existing structure, salary philosophy and the overall administration of the organization’s compensation program. This research reinforced the concept of the organization’s focus on total compensation, being competitive in the non-profit market and having a program that is merit based.

In our evaluation, we identified compression in our organization’s structure, noting that many staff serve in the Director category and very few staff in the Assistant category. This creates a bottleneck when it comes to staff advancement within the organization. To address this compression, we reorganized the structure of the organization, eliminating the Assistant position and reclassifying those positions to Coordinator level, effective January 1, 2024. Additionally, recognizing that supervisory roles create added complexity and a separate skill set, we created a new classification titled Supervisory Director effective January 1, 2024.

Goal 2: Modernize and innovate revenue streams and diversify donor base: corporate, employee, leadership/mid-level giving, affinity, out-of-workplace, endowment and major gifts/strategic collaborations.

The giving landscape has changed drastically post-Covid – particularly when it comes to workplace giving at organizations who work in hybrid or virtual environments. Competition for philanthropic dollars in Dane County is high. Messaging and fundraising strategies that worked well when corporate and company employee campaigns were United Way’s primary sources of revenue are having to be rethought and retooled. This is the purpose of the Resource Development Revenue Plan to Advance Community Well-Being approved by the Board in March.

A. Overview of Revenue plan

2023 marked the first year of a new Five-Year Revenue Plan. We know that while nationally philanthropic giving continues to rise slightly, the United Way worldwide network is experiencing a slow decline. Locally, we experience some of the same key challenges our network partners face:

- Increasing number of large corporations shifting to third-party processors, removing us from developing a relationship directly with our donors
- Declining number of workplace campaigns
- Declining number of donors participating in UWDC’s campaign

To respond to these challenges, our Revenue plan targets focus on three key areas:

- Major Gifts and Grants
- Workplace Campaigns
- Individuals outside of the workplace

To develop the plan, we first looked at national, UW Worldwide and UWDC data over the last 10 years to analyze our results and identify key areas to focus on as we build our plan for the next five years. Next, we examined our mainstream revenue – this is the growth we can expect year over year. From there, we looked at our key opportunities for growth and developed new stream strategies. Based on these key strategies, we forecasted the growth we expect from implementing each strategy over five years.

The key strategies for the 5-year Revenue Plan are:

- Leverage the Plan for Community Wellbeing to grow corporate and major gifts and participation
- Engage individuals through donor networks and affinity groups
- Enhance our Corporate Social Responsibility partnerships and grow new business development

The 2023 campaign did not meet the target initially set for the first year of our revenue plan; nonetheless, it serves as a foundation for our key revenue plan strategies (such as leadership giving ambassadors, new business development, and Tocqueville engagement). Due to the decline in campaign results, we plan to adjust the 5-year revenue targets to realign and more accurately map our strategies to forecasted revenue targets in 2024.

A major outcome of the Revenue Plan in 2023 was the Board of Directors prioritization of revenue in response to the Cabinet's presentation of the Revenue Plan. Following the presentation of the plan in April, they developed a taskforce of board members to examine opportunities more deeply. Through a 4-meeting focus group approach from May to October, the taskforce identified opportunities for revenue growth and assessed the ROI for each approach. Based on this evaluation, they prioritized three opportunities and presented them to the Executive Committee of the Board in September for approval:

Opportunity 1: Invest in Major Gifts staffing; Consider adjustment of our 86/14 ratio to make this possible.

- Hire a Senior Director of Leadership and Major Giving to lead leadership and major gifts strategy
- Consider hiring a Director in 2024 solely focused on Tocqueville, one of the fastest growing and highest potential areas of campaign and now 260 households

Opportunity 2: Invest in out-of-workplace reach, including emotional marketing story, direct response, and digital marketing.

- Business to Business >>> Business to Business to Consumer >>> Business to Consumer
- 1% in 2024, \$180,000 for marketing

- Consider hiring digital communications/videographer Program Manager role in 2025

Opportunity 3: Increase engagement opportunities (volunteerism/events) and work with businesses to advance culture goals (CSR).

- Distort current workplace resources and work differently
- Align affinity and leadership giving groups with Employee Resource Groups
- Additional volunteer center Program Manager staff in 2025.

Outcomes of the Revenue Taskforce to-date include hiring a Senior Director of Leadership and Major Giving. We created a Director of Tocqueville position intended to be posted in January 2024 but was put on hold due to budget constraints. Additionally, a new taskforce on marketing and messaging is planned for 2024 to further develop our emotional brand strategy to support out-of-workplace reach and direct response. Finally, the recommendations from number three above are the foundation for the 2024 Operations plan for developing leadership networks and affinity groups to deepen understanding and expand our reach.

B. Overview of 2023 Campaign

The 2023 Campaign was led by Campaign Chair Pete Vogel (President and CEO of Vogel Bros. Building Co.) and Vice Chair Larry Barton (CEO of Strang, Inc). We are projecting \$16.8 Million, which is short of our \$18.1 Million goal. This year's campaign goal was a 4% increase over the final total raised of \$17.4 Million in 2022. When factoring known one-time gifts from Centennial commitments in 2022, the 2023 campaign goal represented 8% growth and \$1.3 Million. Factors contributing to the decline included additional challenges with 3rd party processor campaigns and declining participation. These challenges existed in the 2022 campaign, but in the 2023 campaign, more companies cited economic factors and layoffs as contributors to not achieving goal.

There was an 18% increase in number of kickoffs held since 2022. While these numbers increased over 2022, we are still below pre-pandemic kickoff numbers (285 kickoffs in 2019 as reference). Of the 160 kickoffs, 72% were in person with an average of 60 attendees at each.

The Resource Development Team saw significant changes in staffing in 2023 with changes in 11 positions. We are thankful for volunteer support through these transitions. Despite a challenging campaign year, there were many successes including:

- Welcoming a new Vice President of Resource Development
- \$811,297 raised in endowed gifts
- 86% retention of Tocqueville Donors
- 91% retention of corporate gifts
- 69% retention of Lead United donors
- 1,193 new donors

- 35 new corporate gifts
- 11 new Tocqueville Donors
- 49 New Accounts
- Grew number of kickoff presentations from 70 to 162 in 2023
- Became fiscal agent of City/County campaign growing overall market share by 8%
- Raised \$238,101 in sponsorships
- 29% of all lapsed dollars and 35% of all lapsed donors over \$1,000 recovered (as of January 19, 2024)
- Of 124 lapsed donors who gave after follow-up, 44 increased their gift and 59 remained flat

C. Workplace Giving

1. Cabinet CEO Visits and Goal Setting

Under the leadership of Pete Vogel and Larry Barton, the Campaign Cabinet with the support of Account Executives completed 160 CEO visits. An additional 20 declined a formal meeting but provided insight via email or brief phone call. These CEO visits represented more than 80% of total campaign goal. High level trends from CEO visits included:

- Companies are continuing to explore third party processors or otherwise expanding their workplace giving campaigns across their US footprints.
- Companies are seeking new ways to engage employees for recruitment and retention. We propose United Way affinity groups and networks as opportunities to grow their team and increase campaign participation.
- While not all goal conversations resulted in complete approval, we were pleased with high confidence expressed at a significant number of accounts.
- Several new or increased corporate gifts were confirmed.

Despite a high level of feedback through the CEO visit process on campaign goal, only 30% of campaigns where the goal was confirmed by the CEO achieved their 2023 campaign goal.

2. Results by Division

Overall, five divisions saw growth over last year and eight divisions declined from last year. Agencies and Communities grew by 5%, Direct Response by 19%, Individuals and Major Gifts by 1%, Labor by 18% and UTREC by .4%. Despite this growth over last year, only the Labor and Miscellaneous divisions achieved their goal.

2023 Campaign Results

Division	2023 Campaign Projected
Agencies/Communities Division	\$ 212,696
Combined Campaign Division	\$ 986,702

Direct Response Division	\$ 701,672
Hi-Tech Division	\$ 1,213,233
Individual And Major Gifts Division	\$ 4,113,892
Insurance/Finance Division	\$ 4,075,744
Labor Division	\$ 16,323
Manufacturing Division	\$ 615,512
Miscellaneous Results Division	\$ 85,867
New Business Development	\$ 14,743
Professional Services Division	\$ 1,158,875
Retail/Service Division	\$ 1,399,156
UTREC Division	\$ 2,209,474
Grand Total	\$ 16,803,889

3. Combined Campaigns

United Way of Dane County's Combined Campaigns Division achieved notable success in terms of maintaining or increasing market share but faces challenges in the form of declining trends and decreased contributions. UWDC receives a market share of five annual combined campaigns: Partners in Giving (UW-Madison, State and UW Health employees), City of Madison, County of Dane, Madison College and Madison Metropolitan School District. As of February 27, 2023, we have raised \$947,430 and expect to end the campaign with \$985,853, which represents 95% of our \$1,039,500 combined campaign's goal. Revenue from combined campaigns makes up approximately 6% of our total campaign goal annually.

2023 Combined Campaign Results		
	UWDC Market Share	Campaign Total
Partners in Giving	43.2%	\$833,713
City of Madison	39.9%	\$29,491
County of Dane	57.9%	\$49,936
Madison College	37.1%	\$21,979
MMSD	51.6%	\$12,312

Partners in Giving is the largest public sector campaign. Given the structure and large workforce, it provides the greatest opportunity for participation and dollar growth. In 2023, the Partners in Giving Campaign raised more than \$833,700 for United Way of Dane County and our partners, representing almost 90% of our total combined campaigns revenue. Although the number of employees continues to increase, charitable giving has been on a downward trend of 2 to 3% for the last several years.

2023 marked the first year UWDC served as fiscal agent for the City of Madison and County of Dane combined campaigns. Overall, UWDC increased our market share by almost 4%, but revenue from these campaigns decreased by more than \$11,000 in line with the overall trend of declining participation in charitable giving campaigns. Madison College saw similar results. Although our market share percentage increased overall, we saw a decline in campaign contributions and participation.

Rebounding from a tumultuous year, Madison Metropolitan School District more than quadrupled their 2022 campaign, resulting in \$12,312 raised for United Way of Dane County this year. This campaign experienced challenges during the pandemic due to the capacity of educators. The longtime campaign manager and champion also left the district in 2022. We struggled to identify an internal champion and the 2022 campaign did not run until February.

We worked with leadership to rebuild the MMSD campaign with the goal of returning the campaign to its pre-pandemic engagement levels. Through these efforts, we were able to hold a formal campaign in the fall again in 2023, and the overall campaign results were nearly \$24,000 – a 309% increase over the prior year. Despite this success, the campaign still fell about 50% short of its demonstrated potential in campaign years prior to 2021. By implementing proactive strategies, analyzing donor feedback and diversifying fundraising efforts, the organization can overcome these challenges and ensure sustained growth in future campaigns.

4. Loaned Executive Program

The 2023 Class of Loaned Executives (LE) included 10 individuals. Two were loaned from Alliant Energy and UW Credit Union. In recent years, several companies that typically loaned employees shifted to sponsorships. Notably, some have attempted to loan but have been unsuccessful at identifying an internal candidate due to lean staffing. Many remain committed to attempting to Loan in future years including American Family Insurance, M3 Insurance and First Business Bank.

2023 Loaned Executive Sponsorships

Organization	Commitment	Type
Alliant Energy	Full	Loaned
American Family Insurance	Full	Sponsored
Ascendium Education Group	Full	Sponsored
First Business Bank	Full	Sponsored
M3 Insurance	Full	Sponsored
Madison Gas and Electric	Full	Sponsored
Sub-Zero Group Inc.	Full	Sponsored
UW Credit Union	Full	Loaned

Vogel Bros. Building Co.	Full	Sponsored
Group Health Cooperative-SCW	Half	Sponsored
Hooper	Half	Sponsored
J.H. Findorff & Son Inc.	Half	Sponsored
Singlewire Software	Half	Sponsored
Summit Credit Union	Half	Sponsored
McClone Insurance	Quarter	Sponsored

This year, we shortened the LE training program from two-weeks to six days with each day having a different emphasis relevant to the job. Loaned Executives were able to begin their outreach and responsibilities sooner with more guidance in how to accomplish goals, which led to all goals regarding outreach, planning and kickoffs being achieved.

5. Community Voices Program

In 2023, staff from Resource Development, Community Impact and Community Engagement and Marketing met to define the purpose and structure of the Community Voices Program. We decided to limit the speakers list to agency partners, not donor designation agencies and to use more internal CI staff and volunteers to be able to accurately depict the “Why United Way” message. Two training sessions for speakers and internal volunteers were offered with the framework around the Plan for Community Well-being and storytelling best practices. In total, there were 160 kickoffs held in 2023 with Community Voices speakers at 70. Income, Health and 211 were the most requested Community Voices topics.

D. Leadership Giving and Affinity Groups

1. Women United

Women United’s local network of more than 1,200 members is committed to the development of Dane County women and academic success of our children. Our vision is a Dane County where all women and children can succeed and reach their potential. While there is no giving level associated with a membership, we know that the average Women United member gives 83% more than the average donor (\$785 and \$428 average annual gifts, respectively).

Our personal and professional development events provide thoughtful time and space for members to set and achieve goals while building a supportive network of women who care about their community. Our 15 dedicated Council members coordinate these activities for our membership, including the following events in 2023: 1) Health and Gratitude Workshop, 2) Speed Mentoring, 3) Career Transitions and Exploration Panel Discussion, 4) Concerts on the Square and 5) Women United Holiday Social. Our bi-weekly Coffee Collectives attracted local, national and international

women to our casual and virtual coffee breaks, where our volunteers facilitated small group discussions about wellness and development.

We also set forward a strategy for deepening Women United presence in the workplace, and started recruiting Ambassadors who represent their membership in the workplace, ensure their members are personally invited to our events and receive our communications and invite others to join our affinity group.

Our 11th annual Brunch attracted over 300 attendees and raised over \$61,000 for Schools of Hope through ticket sales, text-to-give, Table Hosts (and collaborating with Women of Tocqueville), basket raffles and corporate sponsorships. We honored our 2023 Woman in Philanthropy, Diane Ballweg, for her commitment to helping making Dane County a better place to live, for all. This award honors her achievements in education and her work to empower and inspire others to be philanthropic leaders.

2. Lead United

Our local network of leaders is invested, compassionate and focused on understanding Dane County's critical issues and achieving professional growth. Lead United donors give a generous household gift of \$1,000 or more, helping make real, measurable change and maximizing the full potential of every neighbor. Our 1,234 households collectively gave \$2.25 million to our annual campaign, with a 70% donor retention rate.

A total of 61 donors committed to our Step-Up program, a three-year plan to grow their giving from \$500 to \$1,000 annually. Thanks to our generous sponsors at Vogel Bros. Building Company, Stevens Construction Company and Hooper Corporation, these donors' \$500 investments were matched, doubling their local impact! Of these Step-Up members, we found new/increased giving of \$260 per household and 20 are first time donors. In total, Step-Up brought in \$16,000 in revenue, with an expected return of \$46,421 in new dollars over the next two years of their giving.

We asked our corporate partners to promote and recognize leadership giving within their own companies, and five companies from our top 20 accounts participated in or hosted leadership giving events for their staff members, while many more offered incentives to give at the Lead United level. We have eight Lead United Council members from top workplace campaigns that help us make personal touchpoints for members in their workplaces, encourage their campaign teams to promote leadership giving and handle all invitations/welcomes to our Step-Up members.

Our personal touchpoints, bi-monthly newsletters and new LinkedIn group keep our donors connected and welcomed to our network year-round. As part of their membership, they are invited to Lead United hosted events to connect them to the impact of their giving and deepen their understanding of Dane County's most critical issues. Small Plates Big Impact is a food and impact

fair that hosted 213 guests and 14 partner agencies to celebrate our donors for their collective investments into our Plan for Community Well-Being. Our Leading the Way Educational Panel on the housing crisis brought in partners from Baker Tilly and nonprofit agencies working on affordable and long-term housing. Our partnership with LINC has given our members new opportunities for volunteer activities at Back 2School Bash and Blankets and Brews.

3. Tocqueville Society

Since 1990, Tocqueville Society Members – who give an annual gift of \$10,000 or more – have played a pivotal role in addressing our community’s most urgent needs and tackling issues at the root. This committed group of leaders has grown from six families in 1990 to 255 in 2023. Their contributions account for nearly 25% of all money raised at United Way each year.

Led by the leadership team of Sean LaBorde (M3 Insurance) and Cheryl DeMars (The Alliance), Tocqueville Society in 2023 was composed of 256 total members and contributed a total of \$4,642,672. We welcomed 15 new households into our Tocqueville Society group; 22 households celebrated a decade of membership and 115 have been part of the group for over 10 years. Retention of existing members is at 86%. This number is lower than in previous years due primarily to retirements and restructuring in some accounts, including one with our highest number of Tocqueville Donors. Over the past year, 66% of gifts stayed flat or increased, which is thanks to our fourteen Tocqueville Committee volunteers who encourage members to grow their gifts and/or consider endowing their support as Tocqueville Legacy Circle members.

Our Tocqueville Conversation series underwritten by BMO Private Bank continues to be a highlight for members. This year we held two in-person conversations that engaged more than 65 members and guests. The Conversation Series provides members with United Way impact updates and presentations featuring community business leaders and agency experts.

Our annual Tocqueville Society Reception honored all Tocqueville Society Legacy members and present and past chairs. Tilly and M3 Insurance graciously sponsored the dinner with over 120 in attendance. We also recognized the incredible generosity and leadership of Mike and Karin Victorson with the 2023 Tocqueville Society award at the dinner, which was presented by Renee Moe and Sean LaBorde (in both his role as President of M3 and chair of the Tocqueville Cabinet). The Victorsons generously donated a gift to our Schools of Hope program as part of their recognition.

The Victorsons have partnered with United Way for nearly three decades with annual giving and major gifts, through volunteer committee roles and thought leadership and by their direct community service. As they explained, “It’s what we are called to do – to love our neighbors and do our part to improve the community we live in.”

E. Grants and Major Gifts

1. Major Gifts

Following our Centennial year in 2022, we saw strong major gift investments in our work, though understandably not at the level of our Centennial challenge year. It should be noted that many of those gifts were invested in our Foundation, which will continue to fund the core work of United Way into perpetuity.

In 2023 we saw several donors significantly increase their giving or give additional gifts for a variety of reasons. We were saddened at the loss of Senator Herb H. Kohl and thankful for the continued investment in our work this year; we are eager to see what direction they go in the future.

We are investing in the growth of our work through the purchase of a wealth screening tool and the work to build a thoughtful prospect plan. This is being used with help from the Tocqueville Cabinet and other major supporters. Our recruitment plans this year will amplify the connections and passions of our current donors who believe in the life-changing work of United Way.

Our renewing major donors continued to provide steady support to advance our mission. The Henry J. Predolin Foundation continued their significant support in the amount of \$950,000 toward stable housing and nutritious food for low-income families in our community. The cultivation and stewardship of this resource is an excellent example of United Way's collaborative cross-department work. The Irwin A. and Robert D. Goodman Foundation gave an unexpected \$10,000 gift, after a long history that had a planned end date in 2022. We look forward to continuing to evolve our forty-year partnership with this incredible community donor.

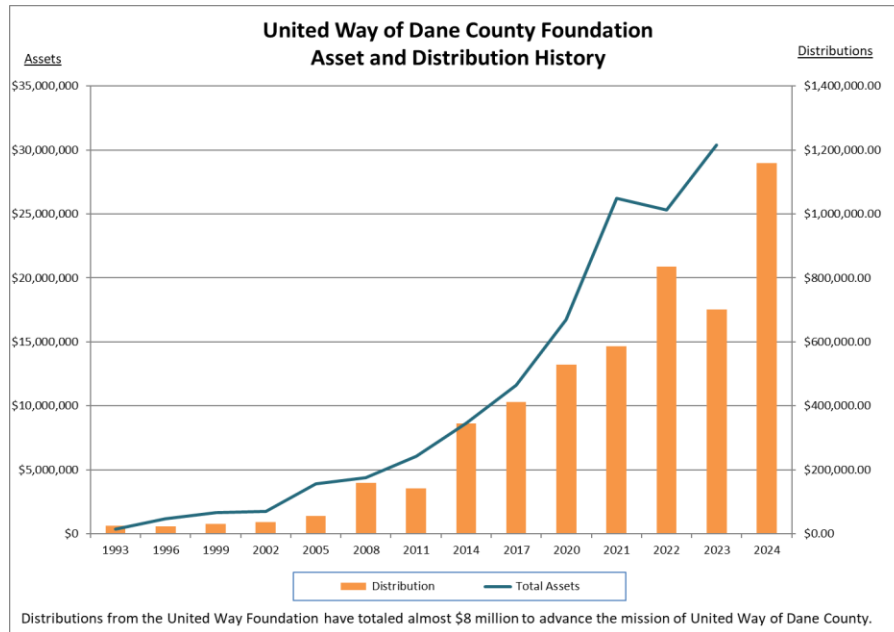
2. Strategic Collaborations

The Strategic Collaborations and Resource Development teams worked together to identify new grant opportunities and share renewal grant opportunities. In total, the team submitted 56 grant proposals, totaling \$5,717,145. These included a mix of corporate, foundation and government grants. As a result, the team secured \$2,809,328 in grant funding (25 proposals funded) with \$827,970 still pending. \$560,870 of the pending funding is for two state Wisconsin Serve (AmeriCorps) grants to support our Elementary Schools of Hope and Achievement Connections programs, both of which are expected to be awarded by mid-July 2024. This would bring the total Strategic Collaboration team's successful revenue contributions for 2023 to \$3.37 million.

On the grant management side, the Strategic Collaborations team managed \$6,500,000 in grant funding (27 funders total) in 2023. These included several large grants (each originally \$1,000,000) to support ConnectRx Wisconsin. Grant management responsibilities across the team required the completion of 38 grant reports to funders, and the team maintained 100% funder compliance.

We continue to work towards greater impact by refining our processes. In 2023, this included mapping strategies for grant prospecting, collaborating with RD Operations to transfer grant tracking logs into Community Connect, receiving training on using Community Connect to prospect for new grants, participating in Community Impact’s equitable grantmaking initiative, supporting the Housing and Early Childhood delegations, engaging with Community Solutions Teams and collaborating with CEM to update UWDC website content.

3. Update on United Way Foundation



The 30th anniversary year for United Way of Dane County Foundation highlighted increased impact and outreach. Total Foundation net assets at year-end 2023 were \$29,400,340; meanwhile expectancies were estimated at \$15 Million. Our Foundation exists to provide ongoing support for the mission of United Way and extend the legacy of local, effective philanthropy for our donors. In fulfilling those objectives, the February 2023 distribution exceeded \$700,000.



Uno Terrace on Mineral Point Road opened to tenants in 2023; the project received a loan from the Affordable Housing Fund Committee.

Of the six new named funds established, three of them are intended to endow annual gifts as part of the Tocqueville Legacy Circle. The Affordable Housing Fund Committee continued its strategy to distribute all available funds and volunteers recommended two new loans totaling \$250,000. Over its first five years, the committee approved eight loans which will build a total of 416 housing units. The 2023 United Way Foundation-Loaned Executive Grants provided \$10,000 in flexible funding for eight BIPOC-led nonprofits.



We again celebrated 25+ year United Way donors and Foundation supporters at the Loyal Contributors Party (pictured on the left), underwritten by Trustees and hosted at the downtown office of Godfrey & Kahn. Attendees included original Foundation Board member Catherine Taylor (pictured in blue) who now serves as an Honorary Trustee as well as several donors who have given for 50 years and longer.

F. Operational Work to Support Fundraising

1. Direct Response Efforts

Direct response effort contributes to the growth of the brand, engagement and revenue. In 2023, we raised a total of \$601,708 (of our goal \$705,000), with 1000 Renewed/Returned donors and 249 New donors, (pacing at a 3% increase over last year). In addition to the three mailed letters and one printed "Thank You" card, new email efforts led to the creation of 16 email touchpoints and a redesigned donation page to assist tracking of integrated marketing efforts. All touchpoints included a clear-call-to-action to Donate. Direct Response Email Campaigns resulted in a 50% open rate (audience size: 1,546 and 0.5% click through rate).

In 2023, we ran a \$300 Giving Tuesday Social Media campaign that resulted in 73,117 impressions, 32,126 reach, and 387 clicks. New in 2023 was the addition of Giving Tuesday email campaign touchpoints (seven emails), resulting in \$13,640 in donations.

2. Operational Innovation

A Campaign Team Workshop was held in-person at HyCite Enterprises where employee campaign managers and ambassadors were invited to learn about the Plan for Community Well-Being and campaign best practices. The training highlighted ways to increase giving and participation through education and engaging staff. There were 34 employee campaign managers in attendance. This is a slight decrease from previous years and believed to be due to limited staff capacity for outreach and being the first in-person training since the pandemic.

The executive summary utilized on CEO visits was developed through UPIC Solutions and deployed to our CRM. This increased staff capacity and allowed the reports to be re-pulled as campaign results were attained/updated.

We revised the donor follow-up strategies to align with mid-level giving strategies. These reports and processes allowed us to thank donors before a campaign kicked off as well as promptly follow up with donors who did not give this year when a campaign ended. Some of the processes allowed

us to efficiently mark these follow-up activities and track each activity at the account and individual level. We have seen success in our renewal rate of lapsed donors.

We also worked to create a Leads Management process when leads are created via online forms or event participants. Previously, we did not solicit or include event attendees in our newsletters. The process now includes turning qualifying leads into contacts, adding memberships where applicable and including contacts on distribution lists for the general newsletter and event newsletters.

Goal 3: Assure operational innovation and efficiency to maximize the use of resources.

A. Financial Position

United Way of Dane County
Financial Statement Dashboard
December

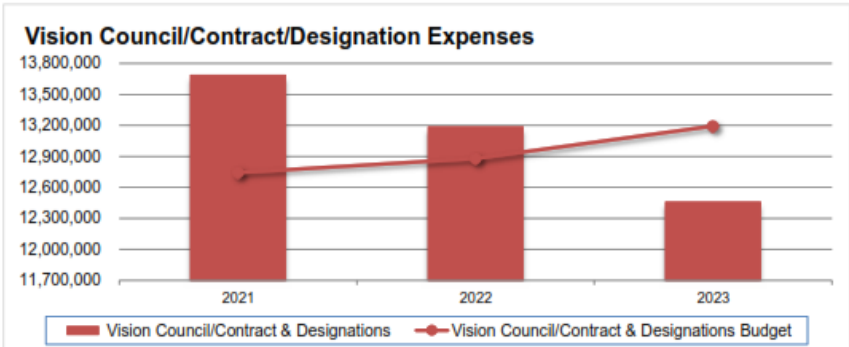
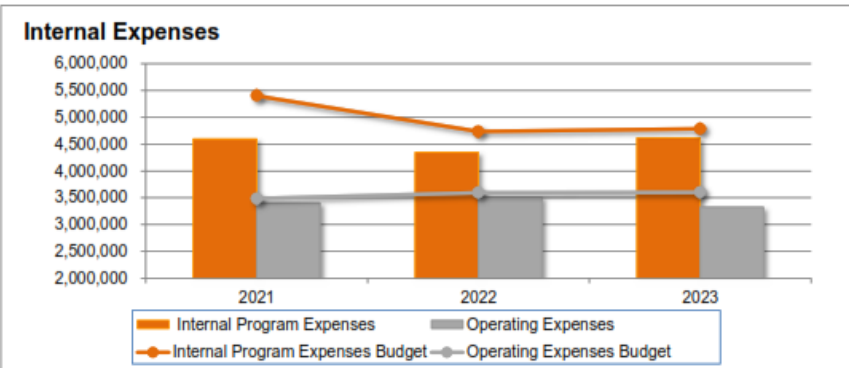
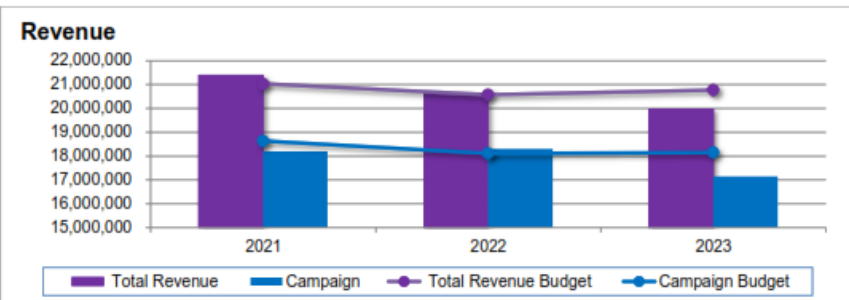
Year	Cash/Investments
2023	9,123,841
2022	9,458,777
2021	10,163,472

Year	Pledge Receivables	% of Campaign
2023	1,039,895	9.4%
2022	1,011,881	9.1%
2021	1,263,684	9.7%

12/31 Reserves		
Year	Forecast/Actual	Reserve Target
2023	2,572,213	2,326,141
2022	2,933,027	2,318,899
2021	3,285,463	1,125,631

12/31 Surplus/(Deficit)		
Year	Forecast/Actual	Budget
2023	(423,726)	(807,476)
2022	(399,617)	(633,162)
2021	(292,156)	(591,545)

12/31 Program Service Ratio (Goal 86%)		
Year	Forecast/Actual	Budget
2023	87.4%	87.2%
2022	85.7%	86.4%
2021	86.4%	86.8%



1. Reserves and Deficit

The 2023 operating budget had a planned deficit of \$807,476. This was an intentional use of reserves to keep funding to agencies and internal operations whole while the campaign rebounded from the impacts of COVID. The year-end forecast projects a deficit of \$423,726, which reduces the impact on operating reserves.

As of January 1, 2023, the unrestricted reserve balance was \$2,933,027 versus a reserve policy requirement of \$2,318,899. In 2023, we invested \$175,432 for capital equipment replacement needs, increased the Building Replacement Fund by \$25,000 and used \$423,726 of reserves for operations, lowering the reserve balance to \$2,308,869. The use of building and equipment depreciation of \$220,250 and the use of Board Designated net assets of \$115,000, resulted in (unaudited) growth in reserves to \$2,572,213. This exceeds our reserve policy requirement for the year of \$2,318,899.

2. 2024 (2023 Campaign) Summary of Budgeted Investments

Plan for Community Well-Being	Amount	%
Plan for Community Well-Being items include Vision Council volunteer review investments for mobilization plans, designated gifts and focused grants ¹		
Education: <ul style="list-style-type: none"> All students succeed academically and graduate from high school, prepared for higher education, career and community (includes Schools of Hope) 	\$3,227,275	
Income: <ul style="list-style-type: none"> There is a decrease in family homelessness More people are on pathways out of poverty (includes HIRE, Journey Home) 	\$2,950,753	
Health: <ul style="list-style-type: none"> Reduce racial health disparities in Dane County Increase resiliency and trauma supports for Dane County residents 	\$3,773,893	
Early Childhood/2Gen: <ul style="list-style-type: none"> Children are cared for and have fun as they become prepared for school Coordinate holistic support that empowers multiple generations in a family 	\$1,144,121	
Community Engagement (includes By Youth For Youth, Micro-grants)	\$190,411	
Funding to be determined ² and Donor Designations ³	\$3,794,046	
Plan for Community Well-Being Total	\$15,080,499	

UWDC Services to the Community (includes 211 and Volunteer Center) ⁴	\$3,517,575	
Distributions to Umbrella Federations/Other ⁵	\$1,224,363	
Total Program Expense	\$19,822,437	86.6%
United Way of Dane County Operating Budget ⁶	\$3,813,621	13.4%
Fiscal Agent - Public Sector Operating Budget	\$51,015	
Total Expense	\$23,687,073	

¹Vision Council Volunteer Review Process: distribution of unrestricted contributions to programs by the Community Solution Teams and Vision Council, includes focused grant dollars such as the Predolin Foundation.

²Funding to be determined: includes additional potential unrestricted investments, Community Health Charities and American Heart Association contracts, UWDC Foundation grant process and anticipated grants.

³Donor Designations: restrictions where donors in the private sector have designated to partner agencies or written in an agency that is not listed on the pledge card, including other United Ways.

⁴UWDC Services to Community: United Way 211, Volunteer Center, Community Engagement, Community Impact.

⁵Distributions to other Umbrella Federations/Other: fiscal agent results in the public/private sector campaigns.

⁶UWDC Operating Budget: fundraising, marketing and administrative expenses.

Translation to 2023 Budgeted Revenue	
Category	Amount
Local Total Campaign Revenue	18,696,967
Plus Public Sector – other umbrellas	\$1,275,378
Less Uncollectible Pledge Allowance	\$625,465
Subtotal	\$19,346,880
Plus Non campaign Revenue	\$3,270,000
Plus Operating Revenue	\$273,092
Total 2023 Revenue	\$22,889,972
Plus Funds utilized from reserves	\$797,101
Plus Board Designated Funds Released	\$0
TOTAL BUDGETED RESOURCES	\$23,687,073

3. Update on Foundation Assets Statements

The value of the foundation assets in 2023 were as follows:

Assets	\$29,440,632
\$ distributed*	\$701,013
Gifts/pledges raised	\$2,257,097
Value of expectancies	\$15,000,000

*Annual distribution from the Foundation to support Vision Council investments.

Additionally, the value and management of our Endowment Fund Assets (held in the Madison Community Foundation) in 2023 are shown below:

Assets	\$946,708
\$ Distributed to Support Community Impact	\$37,928

B. Operational Work in Technology Services and Finance

Technology Services' work continues to be varied and diverse. We were pleased to hire and onboard a new Technology Services Program Manager to support the organization. Additionally, we continued to ensure staff have up-to-date equipment through the purchase and issuance of laptops, which ensured that all staff have equipment purchased within the last three years. To support hybrid work, monitors and web cameras were purchased and installed in smaller conference rooms. The team continued to investigate printing issues throughout the year making progress to ensure a more consistent experience for staff. Work will continue into 2024 as we strive to eliminate barriers to excellence. Our Technology Committee kicked off meetings with a focus on Technology Policies which will be rolled out to staff in Q1 2024.

1. Project Management System Training

The Process Improvement team supported the roll out of Project Management training for staff by reviewing proposed training modules and offering recommendations for best practices. All staff training for Project Management was broken into three sessions: Introduction to Project Management; Project Management Online and Best Practices.

2. Data Dashboards

During 2023 we reviewed all data systems and analyzed software that would allow us to efficiently link and create more automated data dashboards. After researching options, we selected Power BI and began researching how other United Ways with similar environments have created dashboards.

Sub metric work continues with the cross-departmental "Dashboard Dynamo" team as they align work between Key Process Indicators (KPI) dashboards and the Internal Management Report. Staff Power BI training is scheduled for Q1 2024.

3. Data Management

The organizational Data Map was updated, and the documentation of the true data source will continue into 2024. Data cleanup is ongoing and will continue into Q1 2024 with a focus on cleaning staff files. All staff equipment has been registered in Azure/Intune which will allow us to update all laptops easily and quickly with one deployment, versus scheduling them individually.

4. ePledge

165 organizations utilized ePledge for their employee campaigns raising over \$4 million dollars in employee pledges. 13 companies used ePledge for the first time in 2023 and a few companies switched from Basic to Premium set up which includes emails to employees. We continue to work with Resource Development to determine companies that would benefit from the ePledge tool.

Multiple departments collaborated to determine how to improve the designation section of the pledging site, which received the most questions in the previous year. Additional language was added to help donors understand that the section provides them the opportunity to select where their gift will go. The “Click Here to Direct Gift” button was added, and it expanded when clicked allowing the donor to make their selections. Some optional items on the site were removed to avoid distractions and the information on ways to get involved was added to the confirmation email. We had fewer donor questions in 2023 and we believe that these enhancements cleared up confusion.

We continued to include an after pledging survey to collect feedback from donors, however we saw a drop in the number of donors completing the survey from 129 in 2022 to 82 in 2023. Like last year, 85% of respondents were satisfied or comfortable with their overall experience with the site. This year, more donors indicated that the site was straightforward and easy to follow compared to the previous year and 94% agreed that it was easy to give through ePledge.

In addition to providing ePledge sites for companies in Dane County, we managed 26 campaigns for employees outside of Dane County which raised over \$417,000 in employee pledges. Staff attended training and used the software to help process pledges made outside of Dane County. We provided directions for Resource Development staff and employee campaign managers on this process to assist with the site set up and ensured that gifts were aligned with the appropriate United Way.

5. Interdepartmental Processes

The Process Improvement Committee (PIC) launched in March 2022. The process of creating a committee charter, determining how to solicit process improvement recommendations from all staff and figuring out how to equitably choose which processes to improve absorbed the efforts of the committee through September. Understanding that the fourth quarter is the busiest and most crucial quarter for United Way, the committee selected three projects to improve, knowing that limited resources, primarily due to staffing shortages, would be available to complete this work. As expected, the projects selected in 2022 rolled forward to the 2023 PIC to finalize. Thanks to the dedication of the new committee members, all three projects were completed in 2023 and rolled out during full staff meetings to ensure staff were aware of and trained on the improvements. These process improvements included the 1) guidelines for internal staff communications, 2) staff responsibility directory and 3) request form and guidelines for mailing list data pulls.

In addition to improving these processes, the Process Improvement Committee agreed to support the Technology Services department by evaluating and testing three versions of Microsoft project management software. After a thorough review of all three platforms, the committee recommended Microsoft Project Online to the Leadership Team for approval. The committee also provided an early adopter focus group to help the TS department comprehensively evaluate the schedule and content of the staff training plan for the software rollout. Once the project management software and

training were underway, there were 2 meetings left of the committee term. The committee chose to start the solicitation for new process improvement ideas from staff in January 2024 so the 2024 committee could begin their term in March by reviewing the submissions, choosing the priority projects and getting underway with improvements to the selected processes.

6. Website

The redesign of our new website was delayed in 2023 due to brand and framework integration. It was best to use two separate companies (Heibing focused on branding and OneEach for backend integration) to support the budget allocated for this redesign. Our redesign website will go live by Q2 2024.

Partnership

Strategic Priority: *Actively listen and connect with others to form mutually beneficial relationships, aligning our services around shared priorities that lead to authentic collaboration and action.*

The **Plan for Community Well-Being** was built with the community – users of United Way services, nonprofit partners, volunteers, donors and other community partners. We work together to increase access and decrease barriers to community well-being, intentionally engaging in conversations with our community – listening and organizing around where needs are, what barriers exist and making space for collaboration – to find solutions to increase access to meet community needs.

Goal 1: Collaborate in ways that engage community voices, raise awareness of local issues, align shared resources and drive overall collective impact.

A. Messaging the Plan for Community Well-Being

At the start of 2023, we launched our new Plan for Community Well-Being. While this plan is meant to inform investment decisions, it is also a new way to talk about our work – helping more people understand what we do at United Way of Dane County, ultimately inspiring them to give, advocate and volunteer. Community Engagement & Marketing worked with Community Impact to develop new messaging that supports the evolution of our work. Here is a snapshot of that updated language:

At United Way of Dane County, we're innovating forward with the Plan for Community Well-Being – a plan built with our community, for our community. This vision for a brighter future focuses on increasing individual and family well-being so that everyone in Dane County can lead healthy, thriving and secure lives – making our entire community stronger and better positioned to thrive.

This vision includes strategies around early childhood, education, income and health – the building blocks of well-being. By continuing to work together with hundreds of local nonprofits, businesses, community leaders, donors, volunteers and families, we're addressing big-picture issues that no one person or organization can solve alone. And, through these collaborations, we aim to create a more cohesive nonprofit ecosystem and achieve greater results. Together we are The Power of Many. Working for All.

B. Community Engagement and Inclusion Committee (CEIC)

In 2023, the CEIC was chaired by Frank Davis. This year, the Board of Directors approved the merger of the Community Engagement Committee (CEC) and Community Impact Advisors Council (CIAC) into one committee that reports to the Board. This combined committee is the Community Engagement and Inclusion Committee (CEIC). The CEIC strengthens community capacity by reinforcing the pipeline of diverse community leaders and by creating a formal avenue to include diverse voices and perspectives in our work. To achieve these goals, membership is comprised of Dane County residents from two specific target audiences:

- Lived-Experience Experts (LEE): Under-represented community members who are (or were) impacted by community services offered to address poverty-related challenges – in particularly those supported by United Way.
- Established Community Leaders: Individuals positioned and willing to leverage their personal and professional networks to support United Way’s goal to raise awareness of local issues, align shared community resources and drive overall collective impact.

In 2023, the committee discussed the following topics at their monthly meetings:

- January: New Joint CEC/CIAC Team Structure: Review Purpose, Benefits, etc.
- February: United Way’s New “Plan for Community Well-Being”
- April: 211 App Review
- May: United Way’s new Housing Strategies
- July: a. Equitable Grantmaking Advisory Committee b. Revenue Plan
- August: Boardwalk Academy
- September: 211 App
- November: “All things Health at United Way”
- December: Housing Update

C. Labor

The AFL-CIO Community Services program's mission is to make the community a better place in which to live, work, raise a family and retire. UWDC’s ongoing partnership with Organized Labor connects workers and their families to community resources and volunteer opportunities and champions support from the Labor community for United Way’s annual workplace campaign. 2023 marked the 60th anniversary of the Labor/United Way partnership.

We engaged the Labor Community in the following ways in 2023:

- **Outreach:** Hundreds of dislocated workers from area companies received information about United Way 211, job search tips and budgeting; and there was continued engagement with the Latinx community through participation in the Latino Support Network and their monthly meetings.

- **Campaign:** Thanks in part to the persistence of the Labor Chair Mike Kempf, six new Labor Unions contributed through the Labor Division. As a result, the Division came in over goal.
- **Awareness:** All six issues of Union Labor News had advertisements to highlight the partnership, to thank Labor/UWDC volunteers, to acknowledge Labor campaign contributions and to increase the visibility and awareness of 211.
- **Community Services Projects:** We had a project at the WI State AFL-CIO Community Services Conference, conducted Labor Day and holiday collections for MMSD TEP (Transition Education Program) students and highlighted VolunteerYourTime.org as the place to find projects to utilize paid volunteer time at the County.

D. Law Enforcement and Leaders of Color Committee

The Law Enforcement and Leaders of Color Committee, co-led by United Way and the NAACP of Dane County, is made up of leaders of law enforcement agencies across Dane County, leaders of organizations representing communities of color and individuals recognized as leaders within communities of color. We also provided meeting space to a newly formed group called the Juvenile Empowerment Team (JET), which convened to support youth violence prevention; this group has now ended its work. Also in 2023, in response to members' request, the LELCC decreased its meeting frequency from monthly to quarterly.

During their quarterly meetings in 2023, the LELCC discussed the following topics:

- Q1: Recruitment and retention of law enforcement officers
- Q2: Clarifying our goal re: recruitment and retention of law enforcement professionals
- Q3: Trust Building between law enforcement and communities of color
- Q4: Discussion: Graham vs Connor

Goal 2: Clearly define partners and the roles we play with each of them, ultimately defining how we want that role to evolve and advance.

A. United Way of Wisconsin

United Way of Dane County staff play a critical role in the partnership with United Way of Wisconsin. The Vice President of Community Impact is a member of the United Way of Wisconsin Board of Directors and attended four quarterly United Way of Wisconsin board meetings in addition to the Summer Institute. Additional United Way of Wisconsin meetings attended by other United Way of Dane County staff include community of practices, marketing and communications, 211 and Great Rivers.

This year, United Way of Wisconsin released an updated ALICE dataset specifically focused on the experiences of ALICE families during economic recovery from the pandemic. ALICE families (Asset Limited Income, Constrained Employment) earn just above the Federal Poverty Level but less than what it costs to make ends meet. We worked alongside United Way of Wisconsin to promote

awareness of and engagement with the updated data, which highlights the challenges that low-income families in our community face, and promotion of the ALICE update through communication strategies (press release, media opportunities and social media).

In addition, United Way of Dane County marketing department provided 211 App marketing templates for the entire State 211 App roll out.

B. United Way Worldwide

United Way Worldwide CEO Angela Williams appointed Renee Moe to the National Advisory Council in 2022. The council has worked to support a network transformation that energizes United Way relevance, sustainability and impact across the country and world. The “Thriving United Way Framework” work product was presented to the Board and staff this fall.

UWDC remains local and autonomous, and supports network citizenship that helps all local United Way organizations improve impact performance, brand health and revenue growth.

Goal 3: Identify and train lived-experience experts who will take on leadership roles in community-change initiatives.

A. Boardwalk Academy

Boardwalk Academy is a key strategy in supporting United Way of Dane County’s commitment to engage and involve diverse communities, especially those racially and ethnically diverse, in decision-making, leadership and action to achieve equitable outcomes in early childhood, education, income and health. This nine-week development series is designed to strengthen the professional and interpersonal skills required for members of our community to serve as active and informed leaders. In 2023, nine participants completed the program in the Spring and another nine completed the program in the fall (out of 10 who enrolled each term).

Beyond Boardwalk Academy aims to re-engage Boardwalk Alumni to continue personal and professional development opportunities initiated during their Boardwalk Academy experience. This year, we hosted an event in June that had 24 Boardwalk alumni attendees and five representatives from our partner nonprofits. We also worked with four Boardwalk alumni to gather their testimonials for United Way of Dane County marketing materials. As a result, in our 2023 campaign, we had two videos featuring Boardwalk alumni and one video featuring a CIAC volunteer. We will work on re-branding the Boardwalk Academy program in 2025.

Engagement

Strategic Priority: *Grow participation and support by building awareness, strengthening partnerships and providing year-round opportunities to give, advocate and volunteer.*

We know that by sharing the importance of the plan for community well-being with our donors and prospective donors in the community, we will increase participation and resources for our mission. We hear from our corporate partners that their employees want to be engaged in the community, and we have been delivering that through events, volunteerism and volunteer kit builds (called ImPacks). We will continue to strategically position our events, affinity groups, leadership networks and internal volunteer opportunities (councils, CSTs, delegations, etc.) to help educate our community on the needs in Dane County and engage them in helping to solve those needs for our neighbors – ultimately building community well-being.

We have made great strides in telling a clear brand story. Through updates to messaging and more compelling storytelling, more people now know and understand our work. The Plan for Community Well-Being is the next step in connecting resource development to impact. By understanding the issues that challenge us and mobilizing organizations, nonprofit partners and individual volunteers to act to support the Plan for Community Well-Being, we are transforming our community for the better through **The Power of Many. Working for All.**

Goal 1: Clarify our brand's meaning in the community and assure internal understanding of who we exist for and how we serve them.

A. Brand Refinement and Development

As we prepared and worked on the new 2022-2026 United Way of Dane County Strategic Plan, we understood that United Way's public story was complex and the community didn't have a clear, compelling understanding of what United Way does or the role we play in the community. Dave Florin, CEO/Partner Hiebing and Marketing Chair led United Way through the positioning work needed to better understand and market our brand. The feedback inspired the creation of our positioning statement and brand compass for our 2022-2026 Strategic Plan. In 2023, we advanced our positioning work with the initial development of the brand idea. Our brand idea and marketing plans will be developed in 2024 by the Brand Ad Hoc Workgroup.

The 2023 community campaign highlighted United Way of Dane County's role as a catalyst for lasting positive change in the creative campaign, *Where You See It, You'll See Us*. By understanding the issues that challenge us, and mobilizing organizations, nonprofit partners and individual

volunteers to act to support the Plan for Community Well-Being, we are transforming our community for the better, through *The Power of Many. Working for All*. Every day you're likely to see United Way's impact – because it's everywhere you look. The posters highlighted our Plan for Community Well-Being initiatives of early childhood, education, income, health and volunteering with a focus on family well-being. The call to donate was carried out in the printed posters and digital assets used in our digital and social media efforts.

In 2023, we featured three video stories of impact – showcasing our ability to address big-picture issues that no one individual or organization can solve alone and create well-being for all in Dane County. The videos featured two United Way of Dane County Boardwalk alumni and a Community Engagement Committee (CEC) Volunteer (now CEIC):

- A Safe and Stable Place to Start: Awa's Story
- My Best Self: Michelle's Story
- Creating Positive Change: Frank's Story

1. United Way Worldwide Brand Update

United Way Worldwide is embarking on an initiative to clarify our global brand strategy and story, locally and globally. This effort is specifically aimed at further clarifying what United Way stands for, how we are different and why audiences should engage with us. This effort will guide United Way's expressions and experiences, with the goal of strengthening recognition, relevance, revenue and reach for local United Ways and as a global Network.

There are three phases of the global brand refresh project: Brand Discovery, Brand Strategy + Story and Brand Activation and Implementation. United Way Worldwide is expected to launch Q4 2024.

We are eager to influence and align a brand strategy and story, brand architecture and visual identity that lifts our work in Dane County and across the network and leverages national and global investments in United Way's brand.

B. Events

The Marketing team led or co-led seven in-person events (see table below) with 2,533 registrants, 2,077 attendees and \$68,921 in donations. Compared to 2022, these seven events had 690 more registrants, 704 more attendees and raised \$11,585 more in donations.

2023 Marketing-Led or Co-Led Event Results

Event	Number Registered	Number Attended	Amount Raised
Centennial Celebration	997	866	
Golf Scramble	66	66	\$6,500
Community Kickoff	744	472	\$651

Women United Brunch	339	322	\$61,545
Tocqueville Dinner	126	122	
Lead United Signature Event	208	187	\$225
Beyond Boardwalk	53	42	
Total	2,533	2,077	\$68,921

We also supported 26 in-person and five virtual events with creative design, communications, social media, logistics and/or planning for Tocqueville, Lead United, Women United, LINC, Business Volunteer Network, ECMs and other groups. There were an additional 22 virtual Coffee Collectives for Women United, bringing the total number of events to 60 for the year.

United Way of Dane County relies on sponsorships to achieve goals in volunteer mobilization and recognition, fundraising and general community awareness and engagement. In 2023, event and volunteer engagement sponsorships totaled \$189,550 from 33 partners. Madison Community Foundation committed \$50,000 for the Centennial Celebration in both 2022 and 2023.

C. Media

This year's marketing and communication efforts focused on wrapping up our Centennial year and successfully launching our new messaging around the Plan for Community Well-Being. In addition to our traditional media visits at the start of campaign season (August), we successfully tapped into media relationships to obtain year-round coverage and build awareness. Our media relationships continue to grow, with WKOW remaining our strongest partner. We also received great coverage in the Wisconsin State Journal and Cap Times (including an op-ed written by our Campaign Chair Pete Vogel in January). This all resulted in 176.7 million for PREM (Potential Reach of Earned Media) and \$1.64 million AVE (Ad Value Equivalency) – exceeding our numbers for our Centennial Year!

Our monthly newsletter reached a 30% open rate compared to 26.2% in 2022. Our CEO message open rate was 33.4% compared to 31.3% in 2022. In addition to supporting the organization and CEO newsletters, the marketing team assists in the scheduling, coordination and review of more than 120 Click-Dimension email communications.

UWDC social media organic impressions reached 487,735 and our paid impressions reached 991,397. New in (Q4) 2023, marketing began leading our CEO social media strategy, which has led to great engagement.

Goal 2: Build relationships with businesses to support Corporate Social Responsibility, employee engagement (volunteerism and awareness), leadership development and civic leadership.

A. Nominating and Governance

This year, we reviewed the process of supporting the Nominating and Governance Committee with an eye towards efficiency and sustainability. Many documents received a visual update to match templates used by the Board; the Board self-assessment survey process, as well as survey questions and methodology, were revised by a small cross-departmental ad hoc task force including Executive Office, Community Impact and Technology staff. The self-assessment survey improvements received unanimous endorsement from the Nominating & Governance Committee. The survey deployed in November and received a 100% response rate. Responses were ranked on a scale of 1 (completely disagree) to 5 (completely agree). Board Engagement scores ranged from 3.82 as a low to 4.65 as a high and Feedback on Staff Performance scores ranged from 4.53 as a low to 4.94 as a high. These numbers translate as a strong commitment from the Board and strong support from staff. The volunteer succession planning project has been postponed to 2025 to focus our internal resources on transforming our revenue model in 2024.

B. Building Relationships with New Business

In addition to stewarding our existing corporate donors, we recognize the value of expanding our reach into new workplaces. Cultivating new relationships often starts with opportunities for volunteer engagement, which help us share our brand story and engage people in feeling connected to the work. The New Business Development Committee was formed to find new businesses to partner with UWDC and then support staff in the process of building a relationship. In 2023, Phil Oullette (EOS Worldwide) led this committee as the Chair with Jason Hiller (Hausmann Group) as the Vice Chair.

While we have learned that it is a long process to turn leads into funders, we saw success this year, including around 20 meetings, two campaigns, a handful of drives, a few Toys for Tots shifts, around five packing events and continued engagement into 2024 with 10-15 organizations. The Committee also secured a \$500 sponsorship for LINC's golf scramble and brought over 25 people to UWDC events throughout the year. These engagements help us build momentum and connection, and we are confident that some may turn into campaign funding relationships in the future. Overall, we raised nearly \$25,000 in revenue from new businesses this year and have many leads to continue working throughout 2024.

Goal 3: Develop equitable, meaningful volunteer opportunities to connect and inspire through year-round engagement and communication.

A. VolunteerYourTime

VolunteerYourTime is an online platform for matching interested volunteers to volunteer opportunities in our community. VolunteerYourTime.org (VYT) currently has 271 active nonprofit accounts, 15,240 users and 460 active opportunities listed. In 2023, 2,163 volunteers found opportunities through VYT – equaling approximately \$68,783 in economic impact!

B. Community Volunteering

In 2023 we hosted 10 community volunteer projects to encourage community engagement. Three of these engagements were amplified by a Volunteer Generation Fund (VGF) grant which matched our expenses for volunteer projects. Those engagements included LINC's Back 2 School Bash, Community Kickoff and the Women United Brunch. All 10 events had approximately \$43,447 in economic impact.

C. Community Kickoff

Our 2023 Community Kickoff event centered around mobilizing attendees to contribute to a large volunteer project while building momentum around our 2023 campaign. At the event, we had 472 volunteers give time to create 4,000 Paper Product ImPacks. This project was doubled due to receiving the VGF grant. We partnered with Community Action Coalition, Porchlight, Second Harvest Foodbank and WayForward Resources to distribute the finished ImPacks to the community. In total, the ImPacks created at Community Kickoff had an economic impact of approximately \$23,328.

D. Corporate Volunteering

In 2023 we hosted 49 corporate engagements with 5,850 volunteers in total. We created 37,825 ImPacks for the community, with a total economic impact of \$155,684.87.

E. Business Volunteer Network (BVN)

Business Volunteer Network brings together local businesses who are invested in supporting volunteering among their employees and networks. In 2023 BVN hosted/participated in nine educational engagements/events. These included the BVN Annual Meeting in February, which brings companies together to learn about opportunities to engage employees through volunteerism and partnering with LINC to host the Golf Outing and Back 2 School Bash. BVN members packed 900 Menstrual Hygiene ImPacks at the Women United Brunch and served 12,000 Dane County students through Toys for Tots.

F. READI

Building community through group volunteer projects is what drives our READI (Retired Employees Are Dedicated Individuals) members to give of their time and talents. With 101 members who donated 4,266 volunteer hours in 2023, READI's involvement continues to rebound post-pandemic.

Established in 1993 by Oscar Mayer Company retirees, READI became a United Way committee in 2017. Since then, its membership has expanded to include retirees (and others) from all walks of life. In addition to volunteer hours, READI has become a strong partner, directing honoraria to the annual campaign and actively attending United Way events.

G. LINC (Lead. Impact. Network. Change)

LINC focuses on young professionals learning about our community and personally making a difference through volunteering – introducing a new generation of philanthropists to United Way. In 2023, LINC ran six events including LINCrawl, its third Golf Outing which raised \$6,500, the Back 2 School Bash, LINCtoberfest dodgeball tournament, the very popular Blankets and Beer and a Toys for Tots shift. Through these six events and nearly 300 volunteers, LINC assembled 1,000 resource packs for the community and raised awareness of our mission.

H. Toys for Tots

Toys for Tots is a partnership with the US Marine Corps. In 2023, Toys for Tots served 12,000 students, which represents an increase from our typical 9,000 since the partnership began. With 12 distribution partners, over 40 distribution sites and 600 volunteers, we successfully distributed gifts to families alongside our partners. Although we do not know the exact value of every gift donated, with volunteer time alone, the economic impact is over \$38,160.

I. Engagement with Agency Partners

Corporate and Community Engagement (CCE) manages the Volunteer Center for Dane County and strives to keep a close pulse check on community needs regarding volunteers and/or supply donations. We can meet resource needs through our ImPacks and frequently seek feedback from nonprofit partners around new ImPack ideas and/or recommended changes. Attending United Way's quarterly Agency Executive meetings and surveying partners throughout the year provides other opportunities for connecting with community organizations. In 2024 we will establish a Volunteer Managers Network (VMN) which will allow nonprofit agency Volunteer Managers to come together and share best practices, as well as coordinating with our Business Volunteer Network (BVN) to meet community needs.

Conclusion

2023 was an important year in UWDC's history. We concluded our Centennial celebration, launched the Plan for Community Well-Being and strengthened internal systems and processes so that we can deeply understand community challenges and catalyze innovative partnerships to improve lives. We are poised to mobilize more caring power to create lasting change for multiple generations. The Power of Many. Working for All.

Appendix 1: Board Leadership

2023 BOARD OF DIRECTORS: 39 members + President & CEO

Updated 1.16.2024; Please notify kiki.fogel@uwdc.org to update details on this list. Thank you.



- | | | |
|---------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1. Chief Shon Barnes
<i>Chief of Police</i>
City of Madison Police Department | 15. Sean LaBorde
<i>President</i>
M3 Insurance | 28. Adam Stevenson
<i>Clinical Professor</i>
<i>Director, Frank J. Remington Center</i>
University of Wisconsin-Madison Law School |
| 2. Jacquelyn Boggess
<i>Executive Director</i>
Center for Family Policy and Practice | 16. Ross McDuffie
<i>Chief Portfolio Officer</i>
National Trust for Local News | 29. Scott Strong
<i>Executive Director</i>
RISE Wisconsin |
| 3. Nolan Brown
<i>Renewal Manager</i>
Zendesk | 17. Barbara McKinney
<i>Community Leader and</i>
<i>City of Madison Alder</i> | 30. Gisèle Sutherland
<i>Associate General Counsel &</i>
<i>Vice President</i>
BMO Financial Group |
| 4. Bryan Chan
<i>CEO</i>
SupraNet Communications, Inc. | 18. Hon. Rev. Everett Mitchell
<i>Judge</i>
Dane County Circuit Court | 31. David Sweitzer
<i>EVP & Chief Experience Officer</i>
TruStage |
| 5. Christine Dahlhauser
<i>Managing Partner</i>
Baker Tilly US, LLP | 19. Christine Negovani
By Youth For Youth Representative | 32. Karen Timberlake
<i>Senior Vice President</i>
Children's Wisconsin |
| 6. Robert Durian
<i>EVP & CFO</i>
Alliant Energy | 20. Rachel Neill
<i>CEO</i>
Carex Consulting Group | 33. Dulce Vlisides
<i>Associate Director of Community</i>
<i>Engagement & Impact</i>
PBS Wisconsin |
| 7. Dave Florin
<i>President and Partner</i>
Hiebing | 21. Lisa M. Peyton
<i>Founder, CEO & President</i>
The Foundation for Black Women's
Wellness | 34. Pete Vogel
<i>President</i>
Vogel Bros. Building Co. |
| 8. Noel Gallagher
<i>Business Agent</i>
Laborers Local 464 | 22. Dr. Corinda Rainey-Moore
<i>Community Engagement Manager</i>
UnityPoint Health-Meriter | 35. Amber Walker
<i>Sales</i>
CarMax |
| 9. Fabiola Hamdan
<i>Immigration Affairs Supervisor</i>
Dane County
Department of Human Services | 23. Tim Ryan, Treasurer
<i>CFO</i>
Lake Ridge Bank | 36. Derek Wallace
<i>Bilingual Economic Support Specialist</i>
<i>(County); Executive Vice President/Chief</i>
<i>Steward (AFSCME Local 720)</i>
County of Dane/AFSCME Local 720 |
| 10. Claiborne Hill
<i>Organizing Director</i>
SEIU Wisconsin | 24. Jay Sekelsky, Chair
<i>Partner</i>
Zermatt Investors, LLC | 37. Jesi Wang
<i>CEO</i>
MetaStar, Inc. |
| 11. Dr. Carlton Jenkins
<i>Superintendent</i>
Madison Metropolitan School District
<i>Resigned from Board: 7/1/23</i> | 25. Ananth Seshedri
<i>Department Chair</i>
University of Wisconsin-Madison
Department of Economics | 38. Bill Westrate
<i>President</i>
American Family Insurance |
| 12. Jeff Keebler
<i>President & CEO</i>
Madison Gas and Electric Company | 26. Kim Sponem
<i>President & CEO</i>
Summit Credit Union | 39. Jane F. (Ginger) Zimmerman,
Secretary
<i>President/Managing Shareholder</i>
Murphy Desmond S.C. |
| 13. Mark Koehl
Community Leader | 27. Dr. Martha Stacker
<i>Division Administrator-CYF</i>
Dane County
Department of Human Services | |
| 14. Paul Kundert, Vice Chair
<i>President & CEO</i>
UW Credit Union | | |

Appendix 2: Staff Names and Titles by Department

Executive Office

Renee Moe Salus	President/CEO
Cathryn-Eve Halmay	Program Manager, Executive Assistant/Communications
Kiersten Foget	Director, Executive Office

Finance & Administration

Nicholas Wood	VP Administration/CFO
Ann McNeary	Director, Labor Participation
Ashley Hosking	Director, Finance & Operations
Christine Bedford	Director, Finance
Dawn Clark	Director, Technology Services
Dede Morgan	Director, Human Resources
Demancea Star	Program Manager, Building
Glenna McKay	Assistant, Finance
Helena Campbell	Assistant, Finance (50% FTE)
Katherine Ridgeway	Program Manager, Finance & Grants
Laura Westling	Coordinator, Human Resources/Finance and Administration
Matthew Hall	Program Manager, Technology Support
Megan Wise	Program Manager, ePledge
Okado Ochieng	Program Manager, Human Resource
Phuong Trinh	Program Manager, Technology Services
Rachel Kohls	Coordinator, Technology Services

Community Impact

Jody Bartnick	Vice President, Community Impact
Aaron Grych	Program Manager, 211 ConnectRx Resources
Ágnes Rédei	Program Manager, 211
Angela Jones	Director, Building Economic Stability
Anneke Kingery	Assistant, SOH Program
Bill Clingan	Program Manager, Income, Workforce and Career Pathways
Breanna Grow	Program Manager, Community Impact
Cortney Dunklin	Director, Education
Ed Wall	Director, 211
Emily Enders Greene	Director, Compliance & Budget (SOH)
Emma Gleed	Program Manager, Schools of Hope
Karl Johnson	Director, Achievement Connections
Kara Coffman	Coordinator, 211 (50% FTE)
Katie Castern	Director, Strategic Collaborations
Kelly Reardon	Coordinator, 211 Resources

Kevin Hudson	Coordinator, 211 Community Information Resource Special
Lauren Martin	Senior Director, Community Impact
Lindsey Gearin	Program Manager, Data and Evaluation
Michael Holly	Program Manager, 211
Nakisha Johnson	Program Manager, HealthConnect
Nicole Sandler	Senior Director, Strategic Collaborations
Sandra Erickson	Director, Community Impact Operations
Sandy Liang	Director, Strategic Collaborations
Shawna Wells	Coordinator, 211 ConnectRx Resource
Taylor Franklin	Director, Strategic Collaboration
Uchenna Jones	Director, Health
Veronica Maceda Moffatt	Coordinator, 211

Community Engagement & Marketing

Karen Burch	Vice President, Community Engagement & Marketing
Adrienne Kramer	Program Manager, Digital Media
Ashley Manthei	Director, Communications
Brian Buckner	Program Manager, Creative Services
Hannah Stowell	Director, Corporate and Community Engagement
Jenny Bravener	Program Manager, Corporate and Community Engagement
Keetra Burnette	Director, Stakeholder Engagement
Nicole Wyss	Program Manager, Corporate and Community Engagement
Stefanie Morrison	Director, Community Engagement & Marketing

Resource & Development

Justin Hardy	Vice President, Resource Development
Carli Freidel	Senior Director, Development
Dan Lutz	Director, Development
Haley Canik	Director, Resource Development Operations
Kristi Shepard	Director, Foundation & Gift Planning
Kyle Engels	Coordinator, Foundation and Major Gifts
Leah Larson	Coordinator, Donor Engagement
Margaret Porter Kratz	Senior Director, Leadership and Major Gifts
Megan Hanuszcak	Director, Development
Mo Whitehead	Program Manager, Development
Molly Schumacher	Director, Donor Engagement
Rachel Schreiber	Coordinator, Development Operations
Sara Runez	Program Manager, Development

Appendix 3: 2022-2023 Public Policy Agenda



Education:

Support public policies that:

- **Expand access to affordable, high-quality early care and education** for under-resourced families and early learning opportunities that meet children's developmental, cultural, and linguistic needs for all children in Dane County.
- **Provide effective professional development and equitable compensation to early childhood educators** and help the early care and education industry respond to the Covid-19 pandemic and beyond.
- **Close educational achievement and opportunity gaps**, particularly for children of color.
- **Increase access to affordable, high-quality post-secondary education and training** programs to ensure all Dane County students are prepared for college, career, and community life.
- **Expand broadband services** to increase children's access to educational opportunities and bridge the digital equity divide in learning.

Financial Stability:

Support public policies that:

- **Strengthen access to job training and workforce development** programs and supports (including expanded access to childcare, transportation, and broadband services) that align to jobs with family supporting wages, benefits, and stable work schedules.
- **Promote equitable, anti-racist labor market practices and work environments** that provide opportunities for career advancement for all.
- **Promote economic stability**, decrease income inequality, help individuals and families increase their earning potential and build wealth, with particular focus on addressing the racial wealth gap.
- **Expand access to affordable housing** and address disparities in homeownership rates.
- **Prevent eviction** and support housing stability.

Continued on page 2



www.unitedwaydanecounty.org • 2059 Atwood Avenue, Madison, WI 53704 • (608) 246-4350

United Way
of Dane County 
The Power of Many. Working for All.



Continued from page 1

Health:

Support public policies that:

- **Protect and improve access to affordable, high-quality health care coverage** and increase the provision of culturally safe, trauma-informed care to achieve health equity.
- **Expand access to healthy food** by addressing food deserts and inequities in food security and ensuring basic nutritional programs are available to everyone.
- **Address bias and racial inequities in health care** and help grow and diversify the health care workforce.
- **Support and promote health equity** initiatives that address the social determinants of health.

Nonprofit and Community Strengthening:

Support public policies that:

- **Protect and expand existing charitable giving tax incentives** that incentivize philanthropy and provide support to the nonprofit sector in Dane County and nationwide.
- **Promote and invest in United Way of Dane County 211** as our community's most comprehensive health and human services information and referral resource.
- **Promote civic engagement**, voter education, representational leadership, equity, and social justice.
- **Promote trusted and community-centered policing best practices** and remove discriminatory barriers for our immigrant, refugee and BIPOC communities.



www.unitedwaydanecounty.org • 2059 Atwood Avenue, Madison, WI 53704 • (608) 246-4350

United Way
of Dane County



The Power of Many. Working for All.