

YEAR IN REVIEW

// 2021



Serving the people of Lincoln, Lyon, Murray, Yellow Medicine and portions of Cottonwood, Lac qui Parle, Nobles and Redwood counties of Minnesota.

OUR MISSION:

Uniting people and resources to improve lives and strengthen communities in southwest Minnesota by investing in local programs.

United
Way



United Way
of Southwest Minnesota

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Lockwood Motors

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Vivayic

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Sarah Kicmal
President & CEO

Julie DeCock
Finance & Administrative Coordinator

Message from the Board Chair

As we look back on 2021, we can be reminded that our communities in southwest Minnesota are resilient. The pandemic has certainly impacted and continues to impact many people across the globe and in our communities. When stress and adversity hit home the ability to bounce back and move forward is key. The United Way of Southwest Minnesota is no different. Our mission is to unite people and resources to improve lives and strengthen communities. There has been no better time to move forward and fulfill this mission than the last several years.

Our ability for the United Way of Southwest Minnesota to raise money and collaborate with our community partners to get this money into the local hands of the folks that need it, has been resilient. We continue to support programs in

our priority areas of education, health, financial stability, hunger, and safety and well-being. Although this has certainly been challenging the last several years, we continued to find ways with our donors, community partners, and volunteers to make that support happen.

Thank you to our donors, community partners, volunteers, and board members for being resilient in your support of the United Way of Southwest Minnesota. Your support helped approximately 40,000+ people this year right here in our local communities. This would not be possible without you, the great people of southwest Minnesota.



Terry Kriz
UWSWMN 2021-22 Board Chair

Message from the President & CEO



I recently wrote an article for our local newspapers inviting readers to think about what their "why" is. Think about it, why do you do the things you do in a day? Why do you volunteer? Why do you work where you work? Why do you give where you give?

It's easy to forget our why. We dive into each day and sometimes find ourselves going through the motions and forgetting why we are there in the first place. It's human nature to lose sight of things sometimes. We need people in our corner to remind us of our why. Maybe it's your spouse, your board of directors, a dear friend or a donor.

Speaking on behalf of UWSWMN, our why is simple! We want to make southwest Minnesota a better place to live for every person in every community, every single day of the year. We do that through the internal programs we invest in and the programs that are awarded funding from our organization. Our donors understand and believe in our why and without them, we wouldn't be able to have a why!

It's important to understand our why and make sure that our life is modeled accordingly. Our lives are built upon our decisions. My decision to leave UWSWMN was a difficult one but is one I made because of my why; my family. I love being a wife and a mom. It's what brings me the most joy and keeps me going each day.

I, along with our board and staff, would like to thank our donors for joining us in our why at UWSWMN. Your support has made a difference in the lives of many local people and is why communities across southwest Minnesota continue to become stronger.

In appreciation,
Sarah Kicmal



Who We Are

United Way of Southwest Minnesota is an independently incorporated 501c3 organization governed by its own local Board of Directors. There are no fundraising quotas and all resources are under local control and decision making.

United Way Worldwide (UWW) is the support organization for the nearly 1,800 local United Ways around the globe. UWW's work is supported by the 1.5% membership fees paid by local United Ways such as ours. The membership fee we pay to UWW is recouped by our local communities many times over in training, services, and access to national corporate and employee giving campaigns.

EVERY PERSON, EVERY COMMUNITY, EVERY DAY OF THE YEAR.

United Way of Southwest Minnesota strives to be a model of diversity and inclusion. Our board, staff and volunteers reflect the many faces, cultures and walks of life that make up the communities we serve.

We respect, value and celebrate the unique attributes, characteristics and perspectives that make each person who they are. We also believe that bringing diverse individuals together allows us to collectively and more effectively address the issues that face our communities. It is our aim, therefore, that our community partner programs, strategies and community investments reflect these core values.

EDUCATION INITIATIVES

We provide our internal education initiatives to children living in the following school districts in our service area: Canby, Clarkfield, Dawson/Boyd, Echo, Fulda, Hendricks, Ivanhoe, Lake Benton, Lakeview, Lynd, Marshall, Milroy, Minneota, Murray County Central, Russell-Tyler-Ruthton, Tracy Area, Westbrook-Walnut Grove and Yellow Medicine East.



IMAGINATION LIBRARY

- Provides one book each month to children, from birth to age 5. These sturdy, colorful, age appropriate books are delivered directly to the child.



STUFF THE BUS

- Annual event held each summer that supports local K-12 students with the basic school supplies needed to learn and be successful.
- Staff at each school ensures that supplies reach those who really need extra support.



STUDENT EMERGENCY FUND GRANT

- Offered to schools in our service area to support their neediest students.
- Past fund use examples include: socks, shoes, hygiene items, eyeglasses and vision exams, emergency food support, winter apparel, activity fees and more.

FOCUS AREAS

Support from the United Way of Southwest Minnesota funds local programs in five focus areas: Health, Education, Financial Stability, Hunger, and Safety & Well-Being.

In addition to investing funds into programs supporting local children and schools throughout our service area, UWSWMN also invests funds through our Community Impact Grant process. The grant review process is run by community volunteers who work in teams to review grant applications and conduct interviews with program representatives to assess each program’s plans and goals, metrics and results, and financial management. After completion of these reviews, the team comes together to make funding recommendations to the UWSWMN board. Each of the following programs has went through this process and been awarded funding for their listed program. We are proud to call them our community partners!

FOCUS ON // HUNGER

Increasing food access, nutritional awareness and outreach.







ORGANIZATION/FUNDED PROGRAM	INVESTMENT
Marshall Food4Kids	
Weekend Food Backpacks	\$7,500
Neighbors United Resource Center	
Sanitation and access improvements	\$2,675
Prairie Five Community Action Partnership	
Yellow Medicine County Senior Meals	\$10,000
United Community Action Partnership	
Kitchen Table Food Shelves (Tracy & Marshall)	\$45,180

FOCUS ON // HEALTH



Increasing healthy behaviors and wellness.




ORGANIZATION/FUNDED PROGRAM	INVESTMENT
Lutheran Social Services	
Senior Meals	\$18,000
Marshall Community Services	
Cultivating the Best in Play	\$2,500
Prairie Home Hospice & Community Care	
Prairie Home Hearts & Hands Volunteer	\$3,000

FOCUS ON // FINANCIAL STABILITY

Improving financial stability and independence.

ORGANIZATION/FUNDED PROGRAM	INVESTMENT
Junior Achievement of Lincoln County	
K-12 Financial Literacy Programs	\$8,000
United Community Action Partnership	
Free Tax Preparation Clinics	\$15,075
United Community Action Partnership	
The Refuge Homeless Shelter	\$19,000

***COVID-19 Response Funding**

The United Way of Southwest Minnesota supported local organizations with emergency funding in response to the Coronavirus Pandemic. Funds were used for initiatives such as obtaining cleaning supplies, PPE, social distancing barriers and equipment, emergency financial assistance, meals, and more.



FOCUS ON // EDUCATION

Improving life-long learning and development.

ORGANIZATION/FUNDED PROGRAM	INVESTMENT
Lincoln Elementary Makerspace	\$4,200
Mustard Seed Kids Kindergarten Readiness Program	\$1,876
ServeMinnesota Minnesota Reading Corps	\$13,000
SWWC Foundation for Innovation in Education SSWWC Student Enrichment	\$8,000
United Way of Southwest Minnesota 1,000 Books Before Kindergarten, Born Learning Trails, Jumpstart's Read for the Record, Little Red Bookshelf, Fun in the Sun Kits, Family Fun Fest, Beyond the Book Learning Activities	\$15,977
United Way of Southwest Minnesota Imagination Library Book Program	\$58,673
United Way of Southwest Minnesota Student Emergency Funds	\$9,905
United Way of Southwest Minnesota Stuff the Bus School Supply Distribution	\$11,638

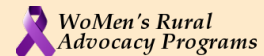
SERVE
MINNESOTA



FOCUS ON // SAFETY & WELL-BEING

Increasing access to services focused on safety and well-being.

ORGANIZATION/FUNDED PROGRAM	INVESTMENT
Countryside Public Health MindUp	\$3,106
Greater Minnesota Family Services* COVID-19 Grant	\$1,500
Lakeview Independent School District #2167* COVID-19 Grant	\$1,800
Lincoln Elementary* COVID-19 Grant	\$2,000
Marshall Public Schools* COVID-19 Grant	\$1,800
Minneota Public Schools* COVID-19 Grant	\$1,800
Murray County Central Schools* COVID-19 Grant	\$1,800
New Horizons Crisis Center Crime Victim Services Parenting Time Program	\$35,000 \$18,000
Russell-Tyler-Ruthton Public School District* COVID-19 Grant	\$1,800
Samuel Lutheran School* COVID-19 Grant	\$1,250
SSt. Peter's School* COVID-19 Grant	\$2,000
St. Stephen's Lutheran Preschool* COVID-19 Grant	\$700
True Light Christian School* COVID-19 Grant	\$1,250
United Community Action Partnership Youth Development Programs	\$9,500
Westbrook Walnut Grove Elementary School* COVID-19 Grant	\$1,800
WoMen's Rural Advocacy Program Domestic Violence Services COVID-19 Grant* WRAP Housing Program	\$25,000 \$1,000 \$2,500



FINANCIAL ACCOUNTABILITY

Visit UnitedWaySWMN.org/pa for further documentation including:
Audit, Form 990, Community Investors, In-Kind Donors, and Volunteers.

STATEMENT OF FINANCIAL POSITION	
JUNE 30, 2021	
Data is taken from the 2020-2021 Audit	
CURRENT ASSETS	
Cash and Equivalents	751,192
Reimbursement Receivable	0
Contributions Receivable	
Net of Allowance for Doubtful Accounts	82,985
Inventory on Hand	104
Prepaid Expenses	5,649
Total Current Assets	839,930
PROPERTY AND EQUIPMENT	
Net of accumulated depreciation	790
TOTAL ASSETS	840,720
CURRENT LIABILITIES	
Accounts Payable and Accrued Liabilities	1,982
Distributions to Charities Payable	247,650
Total Other Current Liabilities	249,632
NET ASSETS	
Net assets without donor restrictions	508,103
Net assets with donor restrictions	
Restricted by purpose or time	82,985
Total Net Assets	591,088
TOTAL LIABILITIES AND NET ASSETS	840,720



SOURCES OF SUPPORT

In our 2021 campaign, we received \$499,000 in donations. Those donations came from a variety of sources, as detailed above. Data represented is taken from 2021 campaign results.

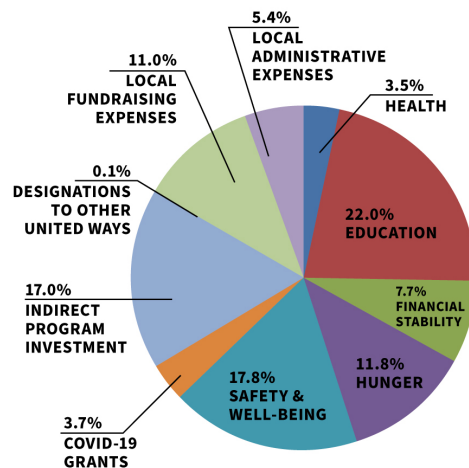
STATEMENT OF ACTIVITIES			
YEAR ENDED JUNE 30, 2021			
Data is taken from the 2020-2021 Audit			
REVENUES AND OTHER SUPPORT	Unrestricted	Temp Restricted	Total
Net Campaign Contribution Revenue	372,349	82,985	455,334
Satisfaction of Restrictions: Time	106,382	-106,382	0
Investment Income	3,469		3,469
Unclaimed/Forfeited Funds	6,800		6,800
In-Kind Contributions	3,000		3,000
Internal Program Income	585		585
PPP Loan Forgiveness	29,105		29,105
Lyon County COVID Grant	10,000		10,000
Total Revenues and Other Support	531,690	-23,397	508,293
EXPENSES			
Program			
Distributions to Charities	368,795		368,795
Other Program Expenses	93,970		93,970
Total Program	462,765		462,765
Supporting Services			
Management & General	29,807		29,807
Fundraising	60,603		60,603
Total Supporting Services	90,410		90,410
Total Expenses	553,175		553,175
CHANGE IN NET ASSETS	-21,485	-23,397	-44,882
NET ASSETS, Beginning of Year	529,588	106,382	635,970
NET ASSETS, End of Year	508,103	82,985	591,088

HOW YOUR DONATIONS ARE INVESTED:

FUNCTIONAL EXPENSE ALLOCATION

Data is taken from the 2020-2021 Audit and is represented in pie chart to the right.

- 3.5% HEALTH
- 22.0% EDUCATION
- 7.7% FINANCIAL STABILITY
- 11.8% HUNGER
- 17.8% SAFETY & WELL BEING
- 3.7% COVID-19 GRANTS
- 17.0% INDIRECT PROGRAM INVESTMENT
- 0.1% DESIGNATIONS TO OTHER UNITED WAYS
- 11.0% LOCAL FUNDRAISING EXPENSES
- 5.4% LOCAL ADMINISTRATIVE EXPENSES



United Way of Southwest Minnesota's overhead ratio, computed using the net method, is 17.79%.

2021 DONORS

We build stronger communities together.



Corporate Leaders

Support of the work of United Way of Southwest Minnesota by its corporate leaders makes a tremendous local impact. In addition to providing a corporate donation, several of these leaders allow us to show their employees how, by working together, we are making a difference in the lives of local people.

PLATINUM LEVEL

\$25,000-\$49,999

North Star Mutual Insurance Company
Schwan's Corporate Giving Foundation
U.S. Bank Foundation

GOLD LEVEL

\$10,000 - \$24,999

Brau Brothers Beer Pairing Dinner

SILVER LEVEL

\$5,000-\$9,999

Avera
Bremer Bank
Land O' Lakes Foundation
Minnwest Bank - Marshall

BRONZE LEVEL

\$2,500-\$4,999

AgPlus Cooperative
BH Electronics, Inc.
Daktronics, Inc.
Grill Works, Inc.
Kiwanis Club of Granite Falls
Lockwood Motors/ABRA/Shine Center

COPPER LEVEL

\$1,000-\$2,499

Border States Electric Supply
Duke Energy
Great River Energy
Great Western Bank
Gruffalo Walk
Hoffman & Brobst
HyVee Food Stores

Legal Estate Planning Solutions, PLLC
Lyon-Lincoln Elect Coop's Operation
RoundUp and members-owners of the coop
Marco
MDU Resources Foundation
Microsoft Matching Gifts Program
Nobles-Murray Rural Electric Trust
Otter Tail Corporation Foundation
Rotary Club of Marshall-Noon
Runnings
V.F.W. Post 742
Western Equipment Finance
Xcel Energy Foundation

PEWTER LEVEL

\$500-\$999

Ace Home & Hardware
Bank of the West
Dana F. Cole & Company, LLP
Extreme Panel Technologies, Inc.
Kruse Buick GMC
Lyon-Lincoln Electric Cooperative
Meier Electric, Inc.
Minnesota Valley Cooperative
Minnwest Bank - Dawson
Pamela Russell, Accountant
Prudential Kontz Financial Group
Quarnstrom & Doering, P.A.
R and G Construction Company
RDO Equipment Co.
Runchey, Louwagie & Wellman
Sanford Canby Medical Center

Slayton Fireman's Relief Association
Slumberland of Marshall
Smile Designers
Southwest Coaches & Southwest Tour & Travel
Stoneberg, Giles & Stroup PA
United Parcel Services
WARAJU, INC.

EMERGING LEADERS

\$300-\$499

Archer Daniels Midland Company
Beverage Wholesalers, Inc.
Bladholm Construction, Inc.
Buffalo Ridge Concrete
Camden Insurance Agency
Canby Drugs & Gifts, Inc. - Mark & Kari Whittier
Cargill, Inc.
Carlson & Stewart Refrigeration, Inc
Cottonwood Co-op Oil Company
Dawson Designated Charities
Jeremiason Photo
Johnson Family Dental Care
Kinner & Company Ltd
Minnesota Cabinets
Minnwest Bank - Tracy
Molly Peterson, Thirty-One Independent Consultant
The Computer Man, Inc.
Thrivent Choice Members
Titan Machinery
Vishay HiRel Systems LLC

Workplace Awards

GOLD AWARD

90-100% employees pledging
Great Western Bank
Marco
Royal Tire
United Way of Southwest Minnesota

SILVER AWARD

65-89% employees pledging
Bremer Bank
Minnwest Bank

BRONZE AWARD

50-64% employees pledging
North Star Mutual Insurance Company

OUTSTANDING CITIZENSHIP AWARD

15%+ increase in employee giving
Ag Plus Cooperative
Avera
Daktronics
Lockwood Motors/ABRA/Shine Center
North Star Mutual Insurance Company
O'Reilly Auto Parts
Royal Tire
Sanford Tracy/Westbrook Medical Center
Xcel Energy

INAUGURAL AWARD

First campaign held in 2021
Western Equipment Finance

Awards of Distinction

AMBASSADOR OF THE YEAR

Stacy Neubeck, Avera

COMMUNITY SPIRIT AWARD

Precision Marketing

RISING STAR AWARD

Ag Plus Cooperative

SPIRIT OF CARING AWARD

Western Equipment Finance

Leaders in Giving

Thanks to each of the many individual and household donors who support improving the lives of local people by making a significant personal investment in advancing our mission to improve lives and strengthen communities in southwest Minnesota.

TOQUEVILLE LEVEL \$10,000+

Carr Family Foundation

PLATINUM LEVEL \$5,000-\$9,999

The Denais-Kruse Family
Miller/Magaard Family
Foundation
One Anonymous Donor

GOLD LEVEL \$2,500-\$4,999

Todd & Lisa Harmening
Terry & Tammy Kriz
Gabe & Jill Pieper

SILVER LEVEL \$1,000-\$2,499

Tony & Patty Alcorn
Helen Andries
David & Joyce Beebout
Chuck & Myrna Bladholm
Todd & Janelle Bossuyt
Chuck & Stacey Broberg
Shawn & Melissa Dieken
Charlie & Kari Ehlers
Kimberly A. Frank
Marcy & Adam Heemeyer
Joy & Pete Hellie
In Honor of MaryJo (Javens)
Horsmann
Robin, Larry & Stephen Johnke
Andrew & Krista Kopperud
Ken & Cheryl Lanoue
Vince & Anne LaPorte
MicheLe Larson
Greg & Becky Lecy
Rachel Nuese
Stacy and Tim O`Leary
Jeannette & Curt Olson
Foundation
Christopher Olson
Matthew & Melanie Pedersen
Nick and Casey Pohlen
Beth Pokorny
Steve & Beth Ritter
Randy & Roxie Serreyn
Ryan & Angela Serreyn
Gary & Wendy St. Aubin

Kong Meng Thao
Annette Tritz
David & Krista Verkinderen
Michelle Warme
Annie Weets
Eric Wallen & Abby Wikelius
Five Anonymous Donors

BRONZE LEVEL \$750-\$999

Lynn Christianson
Josh & Stacy Kiley
Paul & Kirstie Meyer
Bill & Kathy Palmer
Paula Petersen-Giles
Pat & Mary Surprenant
One Anonymous Donor

COPPER LEVEL \$500-\$749

Jason & Molli Anderson
Steve & Tandl Anderson
Randall Bakke
Steven & Carolyn Bennett
Brian & Krista Bjella
Chuck & Susan Blomberg
Jeama Boerboom
Bennett & Janice Bot
John & Becky Bot
Dawn Brewers
Tate & Lena Burckhardt
Al & Michelle Castor
Kaitlin Decker
Chad & Renae Drake
Chad & Tina Eickhoff
Jesse Eisenbacher
Bryan & Chantell Engels
Tracy & Bernard Fink
Jeremy & Amber Gossen
Brad & Karen Gruhot
Jennifer Hart
Julie Hartle
Barb Henle
Korey & Amy Herrick
Lisa Hoff
Ryan & Jennifer Holmberg
Dennis & Brenda Jensen
Bartholomew & Kaia Johnson
Arlen & Connie Knott

Douglas & Marissa Kunde
Bruce & Vicki Lamprecht
Jean Landa
Tom & Angela Larson
Lori Lerohl
Brandi Lillegaard
Mike & Ann Longtin
Jeff & Lynn Mauland
Matthew McDermott
Christopher Nichols
Craig & Margaret Palan
Jim & Gail Polejewski
Kelly Price
Brian & Lisa Rademacher
Kathryn Roberts
Cory Robinson
Tom & Muriel Runholt
Kevin & Stacy Schwartz
Pam Sheeran
Steve & Debbie Streier
Gene & Helen Stukel
Luke & Kassi Tietz
Angelia Trost
Ken & Denise VanKeulen
Justin & Anne Marie Vorbach
Robert & Nancy Walker
Jeremy & Jessica Williams
Three Anonymous Donors

EMERGING LEADERS \$300-\$499

Kelli J Anderson
Melissa Anderson
Josh & Sara Anderson
Steve Belden
John & Margie Bornhoft
Jonathan Brower
Carrie Buddy
Ann Carver
Wayne & Lori Dage
Lori Drietz
Kevin & Sheila Dubs
Kevin & Brenda Elton
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Curtis & Brenda Schake
Kevin Simeon
Daryl & Vicki St. Aubin
Chery Stensrud
Mary Jane Striegel
Josh Sumption
Joel & Lynn Swanson
Jan Timmerman
Lorie Tjaden
Mike & Lynn VanPatten
Lisa Verkinderen
Mark & Sally Vlaminck
Chay Vue
Catherine & Brian Weedman
Hans & Shana Zahrbock
Five Anonymous Donors





EVERY PERSON,
EVERY COMMUNITY,
EVERY DAY OF THE YEAR.

