



# 2023 ANNUAL REPORT

UNITED WAY OF GREATER LAFAYETTE



United Way  
of Greater Lafayette

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# A LETTER FROM OUR LEADERSHIP

As we reflect on an extraordinary year, I am filled with immense gratitude for the unwavering support of our corporate partners, volunteers, and donors. Your dedication has empowered us to achieve remarkable milestones in 2023, culminating in raising an impressive \$4.51 million. We extend our heartfelt gratitude to Campaign Chair Kris Kessler and the dedicated volunteers of the Campaign Cabinet, each of whom played a pivotal role in this remarkable accomplishment.

This year, we had the honor of celebrating our 100th anniversary—a century of commitment to serving our community. Our 100th Celebration Gala in April was a resounding success, bringing together long-time supporters and new friends in a joyous commemoration of our shared legacy. It was a night to remember, filled with heartfelt stories, laughter, and a collective vision for the future.

In conjunction with our centennial celebration, we launched the Century Club Card, an innovative partnership with local businesses designed to foster new donations of \$100 or more to United Way. This initiative not only supports our mission but also strengthens our local economy, highlighting the symbiotic relationship between philanthropy and community prosperity.

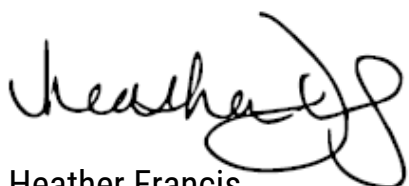
Our internal programs continue to make significant strides in addressing critical needs within our community. "Read to Succeed," our third grade reading initiative, is fostering a love for reading and improving literacy rates among young students in all 20 public elementary schools. "Kindergarten Countdown Camp," our free kindergarten readiness program, is ensuring that children enter school with the skills they need to succeed. Additionally, the Volunteer Income Tax Assistance (VITA) program has provided free tax preparation services to thousands of families, helping them secure their financial futures with millions in tax refunds.

None of these achievements would have been possible without your generous contributions and tireless efforts. Our corporate partners, with their steadfast support, have provided the resources necessary to expand our reach and impact. Our volunteers, with their dedication and passion, have been the backbone of our initiatives, driving our programs forward. And our donors, with their philanthropic spirit, have made it all possible, ensuring that we can continue to serve and uplift our community.

As we look forward to the future, we remain committed to our mission of improving lives and building a stronger, more resilient community. With your continued support, we are confident that we can achieve even greater heights in the years to come.

Thank you for being an integral part of our journey. Together, we are making a lasting difference.

Sincerely,



Heather Francis,  
President, Board of Directors



David Bathe  
Chief Executive Officer





# CRADLE TO CAREER COMMITMENT

United Way of Greater Lafayette works to create positive changes in our community to make Greater Lafayette an even better place to call home. We want our local children to enter school ready to learn so they can graduate from high school, pursue a degree in college or obtain skilled job training, maintain stable, healthy lives at home, and become engaged, productive members of our community who help us continue creating success for others. We cannot do this work alone. We bring people, organizations and resources together to deliver results that meet the needs

of people in Greater Lafayette to create the conditions necessary for success.

## WHAT WE FIGHT FOR...



### Born Healthy

All babies in Greater Lafayette are born healthy



### Enter Kindergarten Ready

Children in Greater Lafayette are academically, socially and physically ready to enter kindergarten



### Read at 3rd Grade Level

Children in Greater Lafayette are reading at grade level by the end of 3rd grade and are prepared for success in school



### Persevere in Middle School

Students successfully transition from elementary to middle school and from middle school to high school



### Graduate High School

Students in Greater Lafayette will graduate high school or obtain HSE prepared to pursue a path towards success



### Career Ready & Beyond

Individuals in Greater Lafayette have the hard and soft skills to enter the workforce and be able to sustain gainful employment



### Basic Needs Met

Greater Lafayette residents can access assistance with food, shelter, safety and health with a goal of moving towards self-sufficiency

## MISSION

Mobilize our community to improve lives.

## VISION

United Way will add value to the Greater Lafayette community by enabling people to help one another. It will provide leadership in defining community needs and in coordinating resources to address community issues.

## VALUES

We are Mission Driven. We believe that change is possible when we all work together. This is at the core of each person on our team.

We believe real change takes All of Us. There is nothing we can accomplish alone. Our individual success depends on our collective success in Greater Lafayette.

We are Persistent. We at United Way of Greater Lafayette, and all our partners, recognize that changing social conditions takes time. We're in this for the long haul.



# COMMUNITY INVESTMENT PROCESS



Through a year-long process, Community Investment Committee volunteers evaluate social service agencies and programs to determine how to invest dollars generated from the annual United Way campaign. The annual process is:

- Volunteer Recruitment
- Volunteer Education/Training
- Applications Reviewed/Site Visits
- Debriefing
- Allocations
- Board Approval & Distribution

## FUNDING GUIDELINES

Investment Guidelines were established to help the Community Investment Committee (CIC) carefully assess each United Way partnership to determine whether an agency has demonstrated alignment with United Way of Greater Lafayette's strategic goals, provides measurable program data, and demonstrates fiscal stability. With these guidelines as the basis for funding decisions, volunteers can ensure donors that their contributed dollars are well-spent.



**Strategic  
Alignment**



**Duplication  
of Services**



**Collaboration**



**Measurable  
Outcomes**



**Financial  
Condition**



**Board  
Governance**



1923

First community-wide campaign. \$23,000 is raised for nine agencies.

1947

Nationally, the Community Chest begins. Do you remember the "Red Feather"?

1966

United Fund celebrates 10th Anniversary. Name is changed to United Community Services.

1969

The Elmhurst Community Building as it is known today, was donated by Mr. and Mrs. Walter Scholer, Sr.

1923

1933

1943

1953

1963

1973

The Community Fund reaches the \$100,000 mark for the first time during the community fund drive.

The United Fund is organized. \$230,000 is raised for 15 agencies.

The year begins with a new name: The United Way of Greater Lafayette & Tippecanoe County

1944

1956

1974



# 100 YEARS OF UWGL



1987

The Vanguard Leadership program is established by Campaign Chair Chuck Wise. The first Vanguard Chairman was Jim Risk of Kirby Risk Corporation.

1981

Jim Smyth becomes new Executive Director of United Way.

1998

75th Anniversary year is kicked off. Campaign Chair Jim Bodemiller raised over \$4 million!

2011-2015

Board revises strategic plan metrics to characterize education, income, and health metrics. Read to Succeed, VITA, Kindergarten Camp launch. UWGL begins Community Conversations.

2023

UWGL turns 100! Celebrates with 100th Anniversary Celebration Gala. Creates Century Club.

1983

The annual campaign led by Doug Branigin, exceeds \$2M goal, UWGL serves 26 agencies.

1984

1993

The Vanguard program receives "a dollar for dollar" match by the Lilly Endowment.

1991

2003

Board agrees to acquire Greater Lafayette Volunteer Bureau along with its mission and staffing to advance the broader focus for United Way.

2006

2013

Tom Murtaugh sets record campaign at \$5.3M. UWGL is asked to facilitate the Opioid Task Force. \$2.5M distributed in Covid Relief. Merged with Montgomery Co. United Fund.

2018-2021

2023

# BOARD OF DIRECTORS

## BOARD OFFICERS

**Heather Francis, President**  
Clay Critters

**Tom Murtaugh, First Vice President**  
Tippecanoe County

**Aaron Baute, Second Vice President**  
Ivy Tech Community College

**Debra Spesard, Immediate Past President**  
First Merchants Bank

**Terence Stevick, Treasurer**  
Retired, Evonik Corporation  
Tippecanoe Laboratories

**Joe Howarth, At Large Member**  
Centier Bank

## BOARD MEMBERS

**Corey Bassett**  
IBEW Local 668

**Laurie Earnst**  
Tippecanoe Senior Center

**Gary Yoder**  
WLFI-TV, Inc.

**Larry Beddow**  
Arconic Inc.- USW Local #115

**Michele Hunley**  
State Farm Insurance Company

**Scott Walker**  
Greater Lafayette Commerce

**Kayla Bretney**  
Everstream

**Kris Kessler**  
Stall & Kessler's

**BeAnn Younker**  
Tippecanoe School Corporation

**Katherine Brinker**  
Caterpillar, Inc.

**Kevin Letcher**  
Retired- State Farm Insurance Company

**Jeffrey Zeh**  
Indiana University Health Arnett

**Jacque Chosnek**  
City of Lafayette

**Patrick Nycz**  
Indiana Design Consortium, Inc.

**Kari Crosier**  
Caterpillar, Inc.

**Jessica Rebmann**  
Turquoise Wealth Management

**Wendy Cummins**  
Agave HR Partners

**Isaac Rivera**  
Advanced Accelerator Applications

**Lesley Denham**  
Subaru of Indiana, Automotive, Inc.

**Evelyn Royer**  
Purdue Federal Credit Union

**Abigail Diener**  
Diener & Martin, LLC

**Elizabeth Searle**  
Ball Eggleston PC

**Laura Downey**  
Concordance Health Solutions

**Thomas Sors**  
Purdue University

“Volunteers do not  
necessarily have the  
time; they just have  
the heart.”  
— Elizabeth Andrew

# 2023 CAMPAIGN CABINET

## CAMPAIGN LEADERSHIP

### Kristopher Kessler

Stall & Kessler's

**Chair**

### Andrew Ball

Henriott Group

**1st Vice Chair**

### Virginia Vought

Purdue University

**2nd Vice Chair**

## COMMERCE

### Grant Gernhardt

DeFOUW Automotive

### Jake Franklin

Trifecta Watches, LLC.

### Jason Conley

Tick Tock Tavern

### Josh Shives

Raeco Realty

### Megan Hartman

SDI Innovations

## HEALTH SERVICES

### Michelle Kreinbrook

North Central Health Services

### Tom Gilliom

Valley Oaks Health

## INDUSTRY & UNION

### Don Scheiber

Retired

### Jenna Winger

Wabash

### Lesley Denham

Subaru of Indiana Automotive, Inc.

### Ray King

Liquid Spring

## CONTRACTORS/TIPPECANOE BUILDING TRADES

### Alex Johnston

Titan Construction

### Matt Huston

Huston Electric

## SPECIAL GIFTS

### Michael McTague

Retired

### Tom Murtaugh

Tippecanoe County

### Joe Seaman

Homestead Resources

## PROFESSIONAL

### Joseph Harrison

Stuart & Branigin LLP

### Kyle Clark

Huth Thompson

### Stephanie Patacsil

Henriott Group

## PUBLIC SERVICE

### Jason Huber

Tippecanoe County

### Stephanie Gage

Tippecanoe School Corp.

## PURDUE UNIVERSITY

### Beth McNeil

Purdue University

### Lisa Duncan

Purdue University

## EMERGING LEADERS

### Brandy Marsh

GE Aviation

## VANGUARD GIVING

### Joe Howarth

Centier Bank

### Jim Smith

Kirby Risk

## WOMEN UNITED

### Jennifer Weston

Tippecanoe County

# VOLUNTEER COMMITTEES

## COMMUNITY INVESTMENT COMMITTEE

**Jacqueline Chosnek, Chair**  
City of Lafayette

**Julia Bryan, Co-Chair**  
Subaru of Indiana Automotive, Inc

**Erica Downey, Co-Chair**  
Purdue University

**Heather Francis**  
Clay Critters

**Collin Huffines**  
Greater Lafayette Commerce

**Eric Barker**  
Purdue University

**Lisa Dillum**  
Tippecanoe County Council

**Bailey Medley**  
United Animal Health

**Alicia Clevenger**  
Lafayette School Corporation

**Brian Gilbert**  
Purdue University

**Tamara Dukes**  
NIC, Inc.

**Scott Busch**  
Gettings Reed Financial Svcs.

**Duran Keller**  
Keller Law

**Vince Phipps**  
Aramark

**Kayla Burke**  
Purdue for Life Foundation

**Robert Malnight**  
Valero, Retired

**Kevin Letcher**  
State Farm, Retired

**Adam Henson**  
1st Source Bank

**Jennifer Weston**  
Tippecanoe County

## FINANCE & AUDIT COMMITTEE

**Terence Stevick, Treasurer**  
Retired, Evonik Corporation,  
Tippecanoe Laboratories

**James Whelan**  
Purdue Federal Credit Union

**Joel Kinsey**  
First Merchants Bank

**Evelyn Royer**  
Purdue Federal Credit Union

**Douglas Crider**  
Retired

## 100 YEAR/MARKETING COMMITTEE

**Patrick Nycz, Chair**  
idc marketing/Newpoint Marketing

**Tom McCool**  
Ivy Tech

**Kris Kessler**  
Stall & Kessler's

**Abe Zaragoza**  
Purdue University

**Josh Shives**  
Raeco Realty

**Sarah Fitzgerald**  
Purdue Federal Credit Union

**Bill Olds**  
Retired

**Jeff Kessler**  
Retired

**Doug Mansfield**  
Kirby Risk



## WOMEN UNITED COMMITTEE

**Jennifer Weston, Chair**  
Tippecanoe County

**Jean Gaumer**  
Kirby Risk

## LABOR ENGAGEMENT COMMITTEE

**Larry Beddow, Chair**  
USW Local #115

**Sheila Klinker**  
State Representative District #27

**Ernest Shepard**  
Ironworkers Local #22

**Roberta Schonemann**  
Jobs with Justice

**Shawn Martin**  
UA Local #157

**Chris Campbell**  
Indiana State Rep

**Bruce Hall**  
LEA Liason

**Joey Demartini**  
USW Local #115

**Chris Lash**  
USW #115

**Seth Wortman**  
USW Local #115

**Don Scheiber**  
ACTWU Local #1818

**Rose Hillard**  
ATU #1741

## VOLUNTEER ENGAGEMENT COMMITTEE

**Kari Crosier, Chair**  
Caterpillar, Inc.

**Stephanie Vanderkar**  
Retired

**Jackie Bahler**  
Retired

**Maureen Keller**  
Retired

## EMERGING LEADERS UNITED COMMITTEE

**Brandy Marsh, Chair**  
GE Vernova

**Theron Long**  
The Villages

**Collin Huffines**  
Greater Lafayette Commerce





# 2023 CAMPAIGN & COMMUNITY AWARDS

## BEST OVERALL CAMPAIGN

### EMPLOYEES 500 & UP

**Winner: Subaru of Indiana Automotive, Inc.**

**Award of Merit: Caterpillar, Inc.**

**Award of Merit: Purdue University**

### EMPLOYEES 101-499

**Winner: First Merchants Bank**

**Award of Merit: SDI Innovations**

**Award of Merit: Primient**

### EMPLOYEES 10-100

**Winner: Truitt Ray Law**

**Award of Merit: Stall & Kessler's**

**Award of Merit: Stuart & Branigin**

## CAMPAIGN COORDINATOR OF THE YEAR

**Lesley Denham**

## CAMPAIGN INDIVIDUAL ROOKIE OF THE YEAR

**Lisa Duncan**

## BILL DEFOUW CAMPAIGN LEADERSHIP AWARD

**Stephanie Patacsil & Andrew Ball**



For this year's Volunteer of the Year Award, we were proud to honor Patrick Nycz. Patrick's remarkable contributions as the chair of the marketing committee over the past six years were nothing short of exceptional. Throughout his tenure, he consistently demonstrated his talents and creativity, driving the success of countless campaigns. His dedication and vision were especially pivotal in the culmination of our momentous 100-year celebration, which included not only a grand gala but also a series of innovative engagement and marketing initiatives. Patrick's unwavering support and efforts were instrumental in shaping the success of United Way of Greater Lafayette, and we remain deeply grateful for his outstanding service.

Dr. Bob Hagen was someone who served sacrificially and had a sincere heart for United Way's mission. Before the 2023 campaign started, Campaign Chair Kris Kessler received an e-mail from Jim Smith about photos from a hot dog sale at Kirby Risk. This happened in February when many people weren't in "campaign mode". Jim was just getting started. The campaign that Jim chaired ended in November, but he continued to push forward and have Kirby participate in more events to give us a successful start to the 100th year. Jim continues to work on the Vanguard committee, shows up to all meetings, and offers generous encouragement to those around him. He truly embodies servant leadership by giving to his work, his community, and those around him through selfless acts of kindness and words of encouragement.



This year's award was presented to Jason McManus of Wabash Center, recognizing his dedication, compassion, and visionary leadership. Jason's deep personal connection to his work has driven him to continually seek new ways to support and uplift those most in need within our community. His commitment to researching, developing, and creating new learning and development opportunities has significantly impacted the lives of his clients. His joyful presence, warmth, and enthusiasm are evident in every interaction, and his efforts have expanded services that benefit not only Greater Lafayette but also the many families represented by his clients. We are honored to recognize Jason for his exceptional service and lasting contributions to our community.

This year, we were honored to present the Board President Award to Purdue University President Mung Chiang and First Lady Kei Hui. Though new to the community, they have already made a significant impact on Greater Lafayette. President Chiang's innovative leadership and dedication to education have helped build strong connections between Purdue and the local community. First Lady Kei Hui's passion for children's well-being and practical learning has enriched volunteer initiatives, particularly in support of early literacy programs. Their commitment and involvement are already benefiting United Way of Greater Lafayette, and we are excited to see their continued contributions in the years ahead.



# TOP 100 COMPANY CAMPAIGNS

1-50

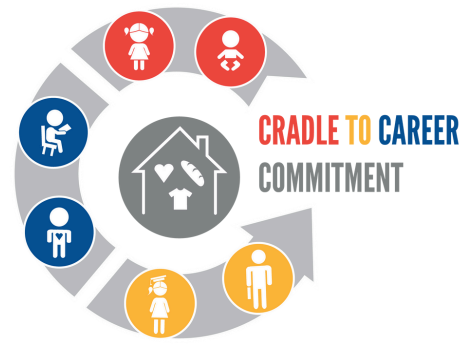
RANK	COMPANY NAME	TOTAL GIFT	EMPLOYEE	CORPORATE	SPECIAL EVENTS
1	Subaru of Indiana Automotive, Inc.	\$804,447	\$639,544	\$62,500	\$102,403
2	Purdue University	\$722,566	\$716,100	-	\$6,466
3	Caterpillar, Inc.	\$646,119	\$319,577	\$319,877	\$6,664
4	Kirby Risk Corporation	\$137,726	\$115,788	\$14,100	\$7,838
5	DeFOUW Automotive	\$129,379	\$129,379	-	-
6	Evonik Corporation	\$106,935	\$57,953	\$46,919	\$2,064
7	Lafayette Life Insurance Foundation	\$85,400	\$5,400	\$80,000	-
8	First Merchants Bank	\$81,406	\$41,705	\$37,500	\$2,201
9	Wabash	\$74,156	\$74,156	-	-
10	Eli Lilly Retirees	\$66,020	\$35,542	\$30,478	-
11	Indiana University Health Arnett	\$51,780	\$26,780	\$25,000	-
12	Purdue Federal Credit Union	\$50,353	\$29,453	\$20,900	-
13	Primient, Lafayette South	\$43,665	\$24,172	\$16,000	\$3,493
14	City of Lafayette	\$41,107	\$29,733	\$7,000	\$4,374
15	Stuart & Branigin LLP	\$38,603	\$36,103	\$2,500	-
16	Dana Corporation - UAW Local #2317	\$33,145	\$20,366	\$10,000	\$2,779
17	Tate & Lyle, Lafayette North	\$29,998	\$13,429	\$16,000	\$569
18	Oscar Winski Co., Inc.	\$29,475	\$20,930	\$6,000	\$2,545
19	Tippecanoe County	\$28,826	\$9,996	\$15,000	\$3,830
20	Henriott Group	\$28,068	\$17,258	\$9,000	\$1,810
21	Ball Eggleston PC	\$28,004	\$28,004	-	-
22	SDI Innovations, Inc.	\$25,032	\$25,032	-	-
23	Arconic Inc. - USW Local #115	\$24,610	\$16,610	-	\$8,000
24	Salud Revenue Partners	\$22,325	\$22,325	-	-
25	Stall & Kessler's Diamond Center	\$21,636	\$21,518	-	\$118
26	Arni's, Inc.	\$21,437	\$10,232	\$10,500	\$705
27	The Mitchell Agency, Inc.	\$18,500	\$15,500	\$3,000	-
28	Huth Thompson LLP	\$17,191	\$16,114	\$500	\$577
29	United Way of Greater Lafayette	\$17,159	\$11,899	-	\$5,261
30	Tippecanoe School Corporation	\$16,183	\$16,183	-	-
31	Lafayette School Corporation	\$15,849	\$15,695	-	\$154
32	Tipmont R.E.M.C.	\$15,791	\$10,791	\$5,000	-
33	Meijer Corporate Stores 137 & 186	\$13,572	\$13,572	-	-
34	City of West Lafayette	\$13,306	\$8,206	\$5,100	-
35	Truitt Ray Law	\$13,000	\$13,000	-	-
36	Ivy Tech Community College	\$12,756	\$12,756	-	-
37	Ash Access Technology	\$12,000	\$12,000	-	-
38	Labor Engagement Committee	\$10,490	\$450	-	\$10,040
39	Old National Bank	\$10,094	\$5,094	\$4,000	\$1,000
40	Kettelhut Construction Inc.	\$10,000	\$5,000	\$5,000	-
41	Tippecanoe Bldg Trades Golf Outing	\$10,000	-	\$10,000	-
42	State Bank	\$9,750	\$8,750	\$1,000	-
43	Centier Bank	\$9,322	\$8,322	\$1,000	-
44	Huston Electric Inc.	\$8,536	\$2,018	\$4,000	\$2,518
45	LiquidSpring	\$8,410	\$7,878	-	\$532
46	GE Aviation	\$8,157	\$1,448	-	\$6,709
47	Morgan Stanley Wealth Management	\$7,707	\$7,707	-	-
48	Saab West Lafayette	\$7,154	\$6,870	-	\$284
49	Franciscan Health	\$7,121	\$7,121	-	-
50	Unity Healthcare	\$6,860	\$6,860	-	-

# TOP 100 COMPANY CAMPAIGNS

51-100

RANK	COMPANY NAME	TOTAL GIFT	EMPLOYEE	CORPORATE	SPECIAL EVENTS
51	Turquoise Wealth Management	\$6,700.00	\$6,700	-	-
52	Security Federal Savings Bank	\$6,500.00	\$3,250	\$3,250	-
53	Regions Bank	\$6,462.98	\$5,663	\$800	-
54	Right Steps Child Developments	\$6,430.10	\$6,430	-	-
55	NCHS/Meridian/River Bend	\$6,300.00	\$3,650	\$2,020	\$630
56	Greater Lafayette Commerce	\$6,188.00	\$6,188	-	-
57	Mental Health America	\$6,130.88	\$5,246	-	\$885
58	Reed & Company, PC	\$6,119.06	\$6,119	-	-
59	Huntington National Bank	\$6,008.00	\$1,008	\$5,000	-
60	J.R. Kelly Company, Inc.	\$5,900.00	\$4,400	\$1,500	-
61	The National Group	\$5,812.00	\$3,312	\$2,500	-
62	Wabash Center	\$5,768.83	\$5,769	-	-
63	The Shook Agency, Inc.	\$5,750.00	\$3,750	\$2,000	-
64	Horizon Bank	\$5,692.00	\$2,846	\$2,846	-
65	Willowstone Family Services	\$5,531.78	\$5,532	-	-
66	Gettings Reed Financial	\$5,525.00	\$5,525	-	-
67	RAECO Realty	\$5,500.00	-	\$4,730	\$770
68	LTHC Homeless Services	\$5,156.17	\$5,156	-	-
69	Lafayette Instrument Company	\$4,716.88	\$2,593	\$2,028	\$96
70	1st Source Bank	\$4,658.71	\$4,119	\$540	-
71	Duke Energy	\$4,585.18	\$1,560	\$3,025	-
72	Toyota Tsusho America, Inc.	\$4,510.74	\$4,511	-	-
73	Lyn Treece Boys & Girls Club	\$4,440.00	\$4,440	-	-
74	HomesteadCS	\$4,187.00	\$4,187	-	-
75	Radian Research, Inc.	\$4,116.11	\$3,390	-	\$726
76	Bouma-Betten Corporation	\$4,000.00	\$1,995	\$2,005	-
77	IBEW Local #668	\$3,962.00	-	\$3,822	\$140
78	Raymond James	\$3,960.00	\$1,980	\$1,980	-
79	Food Finders Food Bank	\$3,758.00	\$3,672	-	\$86
80	Merrill Lynch	\$3,720.00	\$3,720	-	-
81	Scholer Corporation	\$3,645.00	\$1,645	\$2,000	-
82	Candoor Payroll & HCM	\$3,328.00	\$3,328	-	-
83	Riggs Community Health Center	\$3,224.00	\$3,224	-	-
84	ArgentoIT	\$3,100.00	-	\$3,100	-
85	YWCA Greater Lafayette	\$3,057.90	\$3,000	-	\$58
86	Lafayette Adult Resource Academy	\$3,030.58	\$3,031	-	-
87	Citation Homes and Citation Partners	\$3,000.00	-	\$3,000	-
88	Chosnek Law P.C.	\$2,980.00	\$2,980	-	-
89	CityBus - ATU Local #1741	\$2,966.00	\$2,966	-	-
90	Girardot, Strauch & Company	\$2,954.00	\$2,954	-	-
91	Plumbers & Steamfitters #157	\$2,860.00	-	\$2,860	-
92	Hoffman, Luhman & Masson, P.C.	\$2,800.00	\$2,800	-	-
93	Indiana Design Consortium, Inc.	\$2,500.00	-	\$2,500	-
94	Lafayette Wire Products	\$2,500.00	-	\$2,500	-
95	Meeks Real Estate Holdings LLC	\$2,500.00	\$2,500	-	-
96	Pizza King Inc.	\$2,500.00	-	\$2,500	-
97	Wabash Valley Mechanical Cont.	\$2,500.00	-	\$2,500	-
98	B. L. Anderson Company, Inc.	\$2,475.00	\$2,475	-	-
99	Automated Payroll Service LLC	\$2,325.22	\$2,325	-	-
100	Landis+Gyr, Inc.	\$2,092.00	\$2,092	-	-

# PROGRAM FUNDING



## BASIC & FOUNDATIONAL NEEDS

	American Red Cross - Tippecanoe County Chapter.....	\$70,875
	Family Promise of Greater Lafayette, Inc.....	\$27,720
	Food Finders Food Bank.....	\$110,723
	Lafayette Family YMCA.....	\$76,523
	Legal Aid Corporation.....	\$49,815
	LTHC Homeless Services.....	\$312,626
	Mental Health America - Wabash Valley Region.....	\$206,055
	The Arc of Tippecanoe.....	\$20,160
	The Salvation Army.....	\$31,815
	The Tippecanoe Senior Center / Meals on Wheels.....	\$186,035
	Wabash Center.....	\$202,032
	Willowstone Family Services, Inc.....	\$282,560
	YWCA of Greater Lafayette.....	\$153,473

### BASIC & FOUNDATIONAL NEEDS

**\$1,730,411**

## CRADLE TO CAREER COMMITMENT

		Bauer Family Resources.....	\$347,000
		Big Brothers Big Sisters of Greater Lafayette.....	\$90,630
		Boy Scouts of America Sagamore Council.....	\$51,030
		Girls Scouts of Central Indiana.....	\$36,000
		Hanna Community Center.....	\$64,125
		Lafayette Adult Resource Academy (LARA).....	\$62,370
		Lyn Treece Homeless Services.....	\$223,250
		Riggs Community Health Center.....	\$70,000
		Right Steps Child Development Centers.....	\$500,000

### CRADLE TO CAREER

**\$1,444,405**





# 2023 RFPs

	<b>Recovery Specialist Certification Program- LARA</b> .....	\$6,500
	<b>Finance Park/Biz Town - Junior Achievement, Greater Lafayette</b> ....	\$9,000
	<b>The Living Room- NAMI West Central Indiana</b> .....	\$15,000
	<b>Child Advocacy Center - Hartford House</b> .....	\$10,061
	<b>Foreclosure &amp; Eviction Prevention - HomesteadCS</b> .....	\$40,000

RFPs **\$80,561**

# IN-HOUSE PROGRAMMING

	<b>Housing &amp; Stability Hotline</b> .....	\$10,000
	<b>Kindergarten Countdown Camp (KCamp)</b> .....	\$100,000
	<b>Peer Union Counseling</b> .....	\$20,000
	<b>Read to Succeed</b> .....	\$75,000
	<b>Volunteer Engagement Center</b> .....	\$25,000
	<b>Volunteer Income Tax Assistance (VITA)</b> .....	\$88,000

IN-HOUSE PROGRAMS **\$318,000**



# COMMUNITY IMPACT HIGHLIGHTS



## MENTAL HEALTH

**24,000** Crisis Calls and Texts Answered  
**480** Clients Provided Counseling  
**2,240** Clients Receiving Mental Health Support  
**1,280** People Trained in Youth/Mental Health or Suicide Prevention

## HEALTH & SAFETY

**975** Prenatal Clients Served  
**2,280** Breast or Cervical Cancer Screenings  
**1,965** Units of Blood Collected



## CHILD & YOUTH SUCCESS

**1,085** Children Enrolled in High-Quality Early Learning  
**1,860** Volunteers Supporting Child & Youth Success  
**540** Children Prepared for Kindergarten  
**3,500** Students Received Literacy Support



## HOUSING & SOCIAL SERVICES

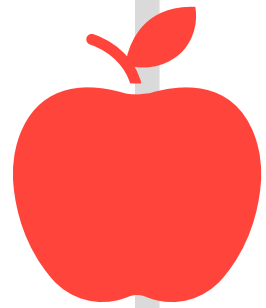
**20,000** Nights of Shelter Provided  
**48,000** Individuals Received Access to Services  
**460** Families Able to Avoid Foreclosure and Stay in their Homes  
**280** Families Moved to Affordable Housing





## MEALS, NUTRITION, & ACTIVE LIVING

**35,000** People Received Food Pantry Assistance  
**3,200** Individuals Participated in Nutrition Programs  
**183,000** Meals Served and Delivered to Food Insecure Households  
**8,360** Households Screened or Enrolled in Public Benefits



## EMPLOYMENT & CONTINUING EDUCATION

**1,800** Adults Provided Employment Services  
**630** Adults Served Working to Obtain HSE and Certifications  
**7,000** Youth Received Life/Job Skill Training

## LEGAL SERVICES

**1,390** Served with Legal Supports  
**297** Adults Provided Free Legal Representation  
**770** Protective Orders Issued



## FINANCIAL SERVICES



**3,500** Clients Received Financial Assistance  
**\$540,000** Saved in Tax Preparation Fees  
**2,095** Clients Served with Free Tax Preparation  
More than **\$2.75** Million in Tax Refunds

# FINANCIALS

*\*Every two years, UWGL has the opportunity for a grant from Indiana United Ways funded by Lilly Endowment, Inc. This fluctuation in revenue directly effects the calculated overhead rate leading to the variability in the overhead costs so we calculate overhead on a four-year average. The four-year average for 2023, which includes two grant years and two non-grant years is 14.3%.*

## STATEMENT OF ACTIVITIES

<b>Gross Campaign Results.....</b>	<b>4,727,743</b>
Less Out of County Designations.....	(355,930)
Less Agency Designations.....	(573,183)
Prior Year Uncollectibles.....	86,876
Less Provision for Uncollectibles.....	(221,346)
Net Campaign Revenue.....	3,664,160
Contributions of Nonfinancial Assets.....	72,152
Contributions of Financial Assets.....	138,095
Grant Income.....	42,960
Sponsorship Income.....	29,600
Interest and Dividends, Net of Investment Fees.....	163,519
Realized Gain (Loss) on Sale of Investments.....	91,766
Endowment Income.....	27,157
Workshop Income.....	6,275
Service Fee Income.....	22,175
Reimbursement Income.....	14,831
<b>TOTAL PUBLIC SUPPORT &amp; REVENUE.....</b>	<b>4,272,620</b>
Gross Funds Awarded and Allocation Expenses.....	3,582,855
(Less) Donor Designations.....	(573,183)
Net Funds Awarded and Allocation Expenses.....	3,009,672
Labor Relations/Community Service.....	107,902
Grant Programs.....	704,294
Management and General.....	434,364
Fundraising.....	591,841
<b>TOTAL EXPENSES.....</b>	<b>4,848,073</b>

*United Way of Greater Lafayette mobilizes our community to improve lives along the Cradle to Career Commitment with a goal of helping every person find their path to success.*

# FINANCIALS

## STATEMENT OF FINANCIAL POSITION

Cash and Cash Equivalents.....	2,092,263
Certificates of Deposit.....	661,764
Pledges Receivable, Net.....	2,774,538
Grants Receivable.....	-0-
Investments.....	3,123,716
Other Assets.....	49,648
<b>TOTAL CURRENT ASSETS.....</b>	<b>8,701,929</b>
Building & Equip Less Depreciation....	521,591
Endowment-CFGL.....	1,360,310
Endowment-Montgomery County.....	929,838
Investments-Permanently Restricted..	4,250
<b>TOTAL ASSETS.....</b>	<b>11,517,918</b>
Allocations Payable.....	3,594,990
Accounts Payable.....	95,500
Accrued Expenses .....	24,820
<b>TOTAL LIABILITIES.....</b>	<b>3,761,348</b>
Net Assets W/O Donor Restrictions	2,354,200
Net Assets With Donor Restrictions	5,402,370
<b>TOTAL NET ASSETS</b>	<b>7,756,570</b>
<b>TOTAL LIABILITIES &amp; NET ASSETS....</b>	<b>11,517,918</b>





# VOLUNTEER ENGAGEMENT CENTER

LIVE UNITED®

## United Way's Mission in Action

### LETTER CARRIERS ANNUAL FOOD DRIVE

**2nd Saturday in May**

In collaboration with the National Association of Letter Carriers and Food Finders Food Bank, United Way and volunteers assist with collecting more than 50 thousand pounds of food in an annual food drive.

### MONTH OF CARING

**Throughout September**

Each year the Volunteer Engagement Center brings people and organizations together to harness the volunteer spirit and improve conditions in Greater Lafayette.

### HOLIDAY GIFT BAGS FOR SENIORS AND VETERANS

**December**

United Way's Holiday Day of Action is all about bringing care and cheer to folks who might be feeling lonely this holiday season. Supplies are collected for care packages to send to local seniors and veterans, providing cards with loving messages and a small set of gifts.

### VOLUNTEER PORTAL

GROUP & INDIVIDUAL OPPORTUNITIES

**Community members donated supplies to fill 200+ care packages for local Seniors and Veterans, totaling nearly \$6,000 in value!**

United Way transitioned to a more modern and engaging volunteer matching platform to better support area nonprofits in recruiting and placing volunteers, as well as facilitating Read to Succeed.



### POVERTY SIMULATIONS

In 2023, over 225 individuals participated in this impactful and interactive experience. Simulations are designed to help community members understand the realities of the ALICE households. Asset Limited Income Constrained Employed families, also known as the working poor, often struggle trying to survive from month to month. The Poverty Simulation exposes participants to the vicious cycles that can derail a family. At the end of the session they learn more about area ALICE statistics and what they can do to get involved with developing solutions locally. Learn more at [uwlafayette.org/poverty-simulation/](http://uwlafayette.org/poverty-simulation/)

**Join the Fight. Live United®.**  
**Learn more at [www.uwlafayette.org/volunteer](http://www.uwlafayette.org/volunteer)**





# VOLUNTEER ENGAGEMENT AWARDS

## GOLDEN GIFT OF TIME AWARD

Recognizes three volunteers who donate a tremendous amount of time and effort to their organization.



**Christine Rearick**  
**Joyful Journey**



**Marjorie Martin**  
**Food Finders Food Bank**



**Mary Lou Berry**  
**Franciscan Health**

## TIPPECANOE COMMISSIONER'S YOUTH AWARD

Honors a youth volunteer and their contributions to Tippecanoe County.



**Brooks Burnette**  
**Rec Room Recording**

## THE FRANCISCAN HEALTH COMMUNITY IMPACT AWARD

Recognizes one volunteer who has widespread impact throughout the community.



**Kevin Koors**  
**Mental Health America**

## MARCILE EDDY SHINING LIGHT AWARD

Recognizes an individual whose commitment is an inspiration to other volunteers in the community.



**Imogene Fought**  
**Franciscan Health/Read to Succeed**

## CITY OF LAFAYETTE YOUTH VOLUNTEER/ CITIZENSHIP AWARD

Recognizes an outstanding youth based on their school and community involvement, with a special emphasis on citizenship.



**Lynette Garcia-Gonzalez**  
**City of Lafayette**

# STAFF

## LEADERSHIP TEAM

**David Bathe**  
Chief Executive Officer

**Jennifer Million**  
Chief Operating Officer

**Amy O'Shea**  
Director of Community Impact

**Reid Kapapa**  
Director of Resource Development

## FINANCE & ADMINISTRATION

**Jane Dieterle**  
Assistant Director of Finance

**Ashley Bieseemeier**  
Finance & Administrative Associate

## RESOURCE DEVELOPMENT

**Janice Smith**  
Donor Experience Associate

**Matt Mellady**  
Resource Development Associate

## COMMUNITY IMPACT

**Rachel Cheeseman**  
Community Impact Associate

**Kelci Fox**  
Community Impact Associate

**Alfonso Salazar**  
Labor Liaison - Engagement Associate

## MARKETING

**McKenzi Wood**  
Marketing Associate

## MONTGOMERY COUNTY

**Gina Haile**  
Area Director

The current staff directory can be viewed at [www.uwlafayette.org/staff](http://www.uwlafayette.org/staff)

Event & Media Sponsors provide an annual donation that underwrites United Way's special events and outreach activities, ensuring that funds from the community campaign will be used to fund the fulfillment of our Cradle to Career Commitment. THANK YOU to our 2023 sponsors for helping us spread our message! We love how you Live United. For more information please visit [www.uwlafayette.org](http://www.uwlafayette.org).

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