

# Report to Our Community 2022-2023

Serving Monroe, Owen, and Greene Counties



United Way  
of Monroe County



## More than 45,000 households in South Central Indiana are in, or one emergency away from, poverty

— including 30% of households with children and 43% of senior (65+) households.

What an exciting year we've had at United Way of Monroe County! We are so grateful for you — our donors, volunteers, Board leaders, and partners — who have supported our community work.

Whether you're a new contributor or a long-time fan, your continued involvement is critical as we help families move from poverty to possibility.

This past year we said goodbye to former Executive Director Efrat Feferman and Resource Development Director Sherrie Shuler. Their work reinforced United Way as the leader in bringing the community together to solve our most pressing needs.

It's an honor to be the new leader for this vibrant organization and I'm energized about the future we can all create working together.

We hope you will continue to put United Way near the top of your charitable giving list. The need is greater than ever, and we cannot do it without you.

Randy Rogers  
President & CEO  
United Way of Monroe County

## Your support of United Way helps local people move from poverty to possibility.

**36%**

OF PEOPLE SERVED BY UNITED WAY FUNDED PROGRAMS ARE EMPLOYED.

**93%**

OF PEOPLE SERVED BY THE UNITED WAY NETWORK ARE LOW- OR MODERATE-INCOME.

**1 IN 3**

PEOPLE IN OUR REGION ARE TOUCHED BY UNITED WAY FUNDED PROGRAMS

### THANKS TO OUR 2022-2023 BOARD OF DIRECTORS

Chair: Kirk White, Indiana University  
Vice Chair: Christopher Pierce, Monroe County Prosecutor's Office  
Treasurer: Derek Fields, IU Health  
Resource Development Committee Chair: Levi Goss, Old National Bank  
Partner Agency Representative: Donna Colón, American Red Cross  
Partner Agency Representative: Emily Pike, New Hope for Families  
Kirsten Grønberg, Indiana University  
Josefa Madrigal, City of Bloomington

Vanessa McClary, SCI Kiwanis Club  
Cy Megnin, Elevate Ventures  
Esthela O'Neill, Ivy Tech Community College  
Jeremy Sowders, Hoosier Energy  
Eric Spoonmore, The Greater Bloomington Chamber of Commerce  
Jerry Sutherlin, Southern Indiana Area Labor Federation, AFL-CIO  
Randy Rogers, Ex officio, United Way of Monroe County

### UNITED WAY STAFF

Randy Rogers, President & CEO  
David Cook, Resource Development Assistant Director  
Chris Hazel, Finance Director  
Jennifer Hottell, Community Engagement Director  
Amy Leyenbeck, Vice President of Community Impact  
Mary Morgan, Director of Housing Security  
Tatiana Wheeler, Assistant Director of Housing Security

See additional United Way team members on our website at [monroeunitedway.org](http://monroeunitedway.org)



# Take Action!

Thanks to community workplaces who supported their employees in sharing time and talent to lift up neighbors. 146 volunteers from 9 organizations assembled baskets, backpacks, and kits to support new moms and babies, families moving out of homelessness, young learners, and families experiencing financial uncertainty.



**60** CAREER READINESS BRIEFCASES

**55** WELCOME HOME BASKETS

**65** BABY BASKETS

**100** LITERACY BACKPACKS

**46** THANKSGIVING MEALS

**50** MENTAL HEALTH FIRST-AID KITS

## HELPING RESIDENTS KEEP THEIR EARNINGS

The Free Community Tax Service brings together volunteers to help local residents file their federal tax returns.

**\$1.4M** IN REFUNDS & CREDITS

**731** FEDERAL RETURNS FILED

**67%** OF CLIENTS ARE SENIORS

**53** VOLUNTEERS

**\$430K** SAVED IN TAX PREP FEES

**8** TAX SITES

## ADDRESSING HOUSING INSECURITY

Heading Home of South Central Indiana works to reduce homelessness and strengthen housing security. In 2022-23, this community collaboration provided trainings for case managers, hosted a Bloomington mayoral candidate forum, and launched a housing resource guide, among other projects.

Looking ahead, Heading Home will continue its partnership with the national Built for Zero initiative, increase landlord support, publish a public data dashboard to track progress in decreasing homelessness, and work to de-stigmatize housing insecurity.

## EMERGENCY FOOD AND SHELTER PROGRAM

United Way partners with the Federal Emergency Management Agency to address local needs through the Emergency Food and Shelter Program. Regional volunteers evaluate applications and make funding decisions. In 2022, United Way was awarded and distributed:

**\$35,523**  
IN OWEN COUNTY

**\$139,670**  
IN MONROE COUNTY

**\$23,236**  
IN GREENE COUNTY

## FINANCIAL REPORT

Balance Sheet - December 31, 2022

### ASSETS

Cash and Investments ..... \$2,855,415  
Pledge Receivables ..... \$484,054  
Other Assets ..... \$200,897  
**Total Assets ..... \$3,540,366**

### CURRENT LIABILITIES

Accounts Payable ..... \$1,599  
Custodial Funds ..... \$1,998  
Other Liabilities ..... \$57,061  
Designations Payable ..... \$228,322  
Lease Liability ..... \$170,361  
**Total Liabilities ..... \$459,341**

### NET ASSETS

Unrestricted ..... \$177,727  
Temporarily Restricted ..... \$2,903,298  
**Total Net Assets ..... \$3,081,025**

**TOTAL LIABILITIES & NET ASSETS**  
..... **\$3,540,366**

# Make an Impact



Collaborative programs, partner agencies, and volunteer projects channeled your generosity into meaningful and lasting change for our friends, neighbors, and entire community.



## OVER \$2 MILLION INVESTED IN OUR REGION

**799** CHILDREN  
AND ADULTS FOUND  
SAFE SHELTER



**7,109** CHILDREN  
AND ADULTS  
ACCESSED PHYSICAL AND  
MENTAL HEALTHCARE



**89%** OF PEOPLE IN  
TRANSITIONAL  
SHELTER MOVED INTO  
LONG-TERM HOUSING



**2,056** YOUTH  
WERE IN  
MENTORING AND AFTER-  
SCHOOL PROGRAMS



**33** PARTICIPANTS  
WORKED TOWARD  
PERSONALIZED FINANCIAL  
GOALS WITH A COACH



**3.5** MILLION  
MEALS & **1.3**  
MILLION POUNDS OF FRESH  
PRODUCE FED LOCAL PEOPLE



READ OUR  
FULL REPORT  
TO THE  
COMMUNITY





**United Way  
of Monroe County**  
431 S College Ave  
Bloomington, IN 47403

NONPROFIT  
ORGANIZATION  
U.S. POSTAGE  
**PAID**  
BLOOMINGTON, IN  
PERMIT # 137

Thanks to you, families are moving from poverty to possibility.

**Want to learn more about your impact?**

See our full Report to the Community at [www.monroeunitedway.org/impact](http://www.monroeunitedway.org/impact)



**Ready to get more involved with creating change in our region?**

Reach out to us at [randy@monroeunitedway.org](mailto:randy@monroeunitedway.org) or call (812) 269-1249.

(812) 334-8370 [www.monroeunitedway.org](http://www.monroeunitedway.org)   *Serving Monroe, Owen, and Greene Counties*

*We stand united in support of equity, diversity, inclusion, and in opposition to discrimination.*

**We work hand-in-hand to tackle complex issues that no one can solve on their own.**



**875** COMMUNITY MEMBERS  
WERE PROVIDED LEGAL  
ADVOCACY



**1,119** STUDENTS  
IN RBB AND  
EASTERN GREENE SCHOOLS  
BENEFITED FROM MINI-GRANTS



**79%** OF PEOPLE IN  
EMPLOYMENT  
SKILLS PROGRAMS SAW AN  
INCREASE IN WAGES

