



## “The Future Isn’t What it Used to Be.” ~ Paul Valéry

The future of United Ways is here. It certainly is not what is used to be. It’s even better. The future is being shaped by the good work of dedicated volunteers and staff implementing, refining, or exploring ways to Advance the Common Good through Education, Income/Financial Stability, and Health issue areas. The future is being shaped each day as forces of all kinds play out at the local level – the weather, economic conditions, cultural changes, and new leadership. The resilience and flexibility of each community is always impressive, as is the commitment to quality services, collaborations, and making lives better for so many.

Indiana Association of United Ways helps navigate these changes, explores and defines opportunities, crafts ways to learn and share ideas most easily and effectively, and helps manage the increasingly complex work efficiently. That role includes being a voice for our members’ work, their priorities, and what makes their communities strong and vital. The pace of change requires new strategies for United Ways to remain focused, and for IaUW to be a bellwether, a friend, a partner. IaUW organizes its work around three broad areas: Community, Performance, and Advocacy.

### **Community...is refreshing, aspirational, hopeful**

*Strategic goal: building a network of local United Ways/Funds in Indiana to increase their learning and collective achievement*

New executive directors and volunteers arrive full of energy and new ideas, ready to connect with veteran experienced professionals. IaUW offers a range of connecting opportunities from roundtables to grant program access.

**1010 Grant Program, Year 2 of 2.** Implementation of the 1010 grant program continued in year two helping members’ campaign recovery from the economic downturn. Targeted matching grant strategies paid off, evident by overall workplace campaign increases.

**Mobilizing Communities.** Members continue to apply new grant funds to strengthen work in Education, Income, and Health, building on previous grant program and community work.

**Stronger Together.** Grant-supported collaborations focused on:

- Bridges Out of Poverty model strategies
- Child care quality improvement
- Comprehensive shared marketing
- Relationship management
- Specialty service software support

**Executive Roundtables** met quarterly featuring timely issues and opportunities, advocacy updates and decision-making, and grant activity sharing. Large and small city specialty groups also met to deliberate on their unique interests.

**Executive Transitions** increased to 11 in 2011, supported by both Community and Performance member service areas: 9 attended two-day New Exec Camp; 4 matched with a veteran Peer Coach; all received targeted benefits through the Indiana Nonprofit Resource Network.

community

overall campaign  
increases for the  
first time in

5  
years

6

1010 grant-supported  
collaborations

# performance

## Performance...brings opportunity, increases potential

**Strategic goal:** creating and delivering tools and resources increasing members' capacity to serve their community

It's a top priority for members to stay current and explore best practices. laUW provides technical assistance to help members implement tools and techniques and supports their challenges. By participating in training programs, conferences, conference calls, and webinars, the potential for success grows enormously. laUW offers a range of annual events and new experiences each year.

**Learning and Training.** New targeted opportunities were offered, giving fresh perspectives on members' needs and capacities. Traditional annual and basic opportunities were delivered as well. We maintained strong relationships with United Way Worldwide to access their national presenters.

**Featured Training Events.** An offer from United Way Worldwide resulted in laUW translating comprehensive Relationship Management (RM) course materials for smaller city use. RM features ways to connect with donors and other constituents more deeply for the long-term. After a statewide full-day Introduction led by a national instructor (15 members, 27 participants), seven small city members began participating in a rigorous two-year course including 5 webinars, conference calls, meetings, and extensive homework. NP&AS staff contributed ANDAR training. Early results include significantly stronger and more focused data collection for closer constituent engagement and learning more about donor interests, new or refined newsletters, and exploration about event adaptations and other engagement opportunities. Lessons and new tools are being shared statewide.

**New Staff Specialty Roundtables.** laUW created four new staff specialty roundtables in 2011. We facilitated meetings for: Marketing, 7 members, 9 participants; Workplace Campaign, 14 members, 19 participants; Community Impact, 10 members, 15 participants; Finance, 7 members, 9 participants.

**State Leaders' Conference.** Attendance was nearly identical to 2010 participation, showing evidence of improving member stability in this economy.

- 37 members represented (16 large cities, 21 small cities, 59 volunteers)
- GEM Communications contest, 102 entered, 32 members

**Basic Training Services.** The core topic "Campaign Structure & Organization for Volunteers Leaders and Staff" was delivered by webinar. Numerous local visits and board presentations were made to ensure strong use of the 1010 grant program including special emphasis on how to capture matching grant funds and how to use the fund to increase local capacity while furthering existing goals.

**Indiana Nonprofit Resource Network.** INRN continues to be a leader in delivering high quality workshops and consulting services to any Indiana nonprofit organization through five regional bases. Custom/private consulting and coaching are well-established core services reaching individual organizations and boards. Two full-time VISTAs started one year of service assisting with social media, webinars, and partnership focus areas. INRN served all 92 counties with 358 workshops and services.

**Nonprofit Processing & Accounting Services (NP&AS)** is a self-supporting program providing a range of campaign processing and reporting services, accounting services, and technology services to clients in 13 states, including 32 Indiana members.



167  
attended  
State Leaders'  
Conference



22  
volunteers/companies  
of the year honored



6377  
INRN participants  
served  
(3510 unduplicated)



1296  
organizations  
served by INRN



52  
NP&AS clients served

# Advocacy...determines the future of our aspirations

**Strategic goal:** representing United Ways to external audiences that contribute to United Way effectiveness and presenting 211, education, income, health, and charitable sector learning and practice to members

advocacy

**Advocacy is telling a story**, taking a stand, giving voice to the voiceless. Awareness and timely updates are vital to active member engagement. IaUW produces a bi-weekly policy e-newsletter and represents members and partners to state and federal policymakers. We provided 7 advocacy workshops and 13 legislative update sessions statewide. IaUW collaborates with many partners and in coalitions to raise awareness about the five policy priority areas below.

## 2-1-1 - securing funding and policies for statewide quality 2-1-1

Indiana's United Ways have served as the primary facilitator, funder and/or supporter of 2-1-1 in Indiana.

Last year, Indiana's 211 centers answered nearly half a million calls and made over 600,000 referrals to government and community- and faith-based organizations. Indiana ranks fourth in the nation for calls as a percentage of state population. IaUW advocates to policy makers how 211 is a cost-effective alternative to duplicative 1-800 numbers and referral databases and is active in natural 211 leadership.



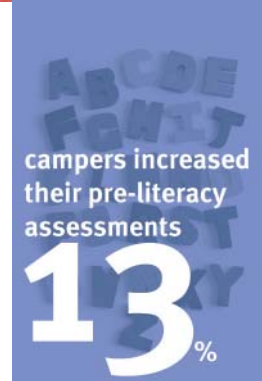
## Education Issues -

*helping all children and youth achieve potential*

Indiana's United Ways across the state support the whole child through classroom instruction, tutoring, mentoring and other school interventions to ensure school success. Indiana's United Ways recognize that early education is key to school readiness and later success.



- IaUW secured financial and in-kind support from IU Health so United Ways could offer **Kindergarten Countdown Camps in eight counties** (Blackford, Delaware, LaPorte, Lawrence, Monroe, Starke, Tippecanoe and Tipton) to incoming kindergarteners at risk of falling behind their kindergarten classmates. Teachers observed increased kindergarten readiness in the campers.
- IaUW also led efforts to educate policy makers about early education policy options and the need for standardizing **health and safety requirements for child care**. IaUW's efforts resulted in improved collaboration among advocates and increased policymaker awareness.



## Income/Financial Stability - helping people become financially stable and independent

IaUW helps to facilitate and support collaborative "asset-building" or "financial stability" coalitions in many communities. IaUW advocates policies that help people become financially stable and independent through asset-building activities such as **Earned Income Tax Credit** and **Child and Dependent Care Tax Credit** as well as expansion of **Bank On** and **Volunteer Income Tax Assistance (VITA)** in local communities. IaUW works with key coalitions to sustain human services.

## Health - improving people's health

Indiana's United Ways support a variety of health **strategies** for individuals and families. They advance policies that increase access to affordable, quality health care **and** support policies that increase participation in healthy behaviors and decrease participation in risky behavior.

## Charitable Sector – ensuring a vibrant charitable sector

Indiana's United Ways support legislation and policies that help ensure a strong charitable sector: tax exemption, charitable giving incentives, ethical fundraising, volunteerism, rights of speech and association, and public information and accountability. IaUW helped preserve Neighborhood Assistance Program (NAP) tax credits and the federal charitable deduction. IaUW advocated for systematic treatment of property tax exemption.

# board



From left: Sue A. Back, Ron Silverman, Clare Baumgardt, Larry Welker

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Bill Bickel, *EFSP*  
Emily Bryant, *EFSP*  
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Tim Clark, *Henry County*  
Tonja Couch, *Bartholomew County*  
Joane Cunningham, *Decatur County*  
Lucy Downton, *Central Indiana*  
Andy Fraizer, *EFSP*  
Kelly Garvey, *Metro Louisville*  
Ed Gerardot, *EFSP*  
Denise Giddens, *EFSP*  
Chris Gilbert, *EFSP*  
Winnie Goldblatt, *EFSP*  
Cathy Graninger, *Clark County*  
Nancy Guyott, *EFSP*  
Ann Hartman, *EFSP*  
Cynthia Hedge, *LaPorte County*  
David Ray Kiely, *St. Joseph County*  
Walter Koon, *Johnson County*  
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June Miller, *Southwestern Indiana*  
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Bryan Newton, *Monroe County*  
John Neiderman, *Huntington County*  
Bryan Orander, *Consultant*  
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Greg Pemberton, *Central Indiana*  
Bob Pimlott, *Jefferson County*  
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Amanda Quirk, *Knox County*  
Janice Replogle, *Delaware County*  
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Susan Solomon, *EFSP*  
James Taylor, *Greater Lafayette*  
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Rose Young, *Southwestern Indiana*

211US  
AIRS

Bank On Indiana

Better Healthcare Indiana

Children's Coalition of Indiana

Coalition to Keep Indiana Warm

Covering Kids and Families

Emergency Food & Shelter Program

Indiana 211 Partnership

Indiana Afterschool Network

Indiana Association of Community Economic Development

Indiana Coalition for Human Services

Indiana Institute for Working Families

Indiana Office of Faith Based & Community Initiatives

Indiana Voluntary Organizations Active in Disasters

IU Health

United Way Worldwide

United Way of Wisconsin

Youth Philanthropy Initiative of Indiana

# partners



# members

United Way of Adams County  
 United Way of Allen County  
 United Way of Bartholomew County  
 Blackford United Way  
 United Way of Cass County  
 United Way of Central Indiana  
 United Way for Clinton County  
 United Way of Danville Area, IL  
 (Fountain County)  
 United Way of Daviess-Martin Counties  
 Decatur County United Fund  
 United Way of DeKalb County  
 United Way of Delaware County  
 United Way of Elkhart County  
 United Way of Fayette County  
 United Way of Franklin County  
 United Way of Fulton County  
 United Way of Gibson County  
 United Way of Grant County  
 United Way of Greater Cincinnati  
 (Dearborn & Ohio Counties)  
 United Way of Greater Lafayette  
 United Way of Greater LaPorte County  
 Henry County United Fund  
 United Way of Howard County  
 United Way of Huntington County  
 Jackson County United Way  
 United Way of Jay County  
 Jefferson County United Way  
 Jennings County United Way  
 United Way of Johnson County  
 United Way of Knox County  
 United Way of Kosciusko County  
 United Fund of LaGrange County  
 Lake Area United Way  
 United Way of Madison County  
 United Way of Marshall County  
 Metro United Way of Southern IN  
 (Clark, Floyd & Harrison Counties)  
 United Way of Miami County  
 United Way of Monroe County  
 Montgomery County United Fund  
 United Way of Noble County  
 United Way of Perry County  
 United Way of Pike County  
 United Way of Porter County  
 United Way of Posey County  
 Pulaski County United Fund  
 United Way of Putnam County  
 United Way of Randolph County  
 United Way of St. Joseph County  
 United Way of Scott County  
 Shelby County United Fund  
 United Way of South Central Indiana  
 United Way of Southwestern Indiana  
 Starke United  
 Steuben County United Way  
 United Fund of Switzerland County  
 Tipton County United Community Fund  
 Wabash County United Fund  
 United Way of the Wabash Valley  
 United Way of Wells County  
 White County United Way  
 United Way of Whitewater Valley  
 United Way of Whitley County

# staff

Lucy Abshear  
 Briann Black  
 Mike Cabat  
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 Kathy Downing  
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 Sue Koralewski  
 Melody McVicar  
 Cheryl Mitchell  
 Lucinda Nord  
 Sue Odom  
 Iverne Russell  
 Kim Sokolow  
 Lydia Vine  
 Rita Wootton

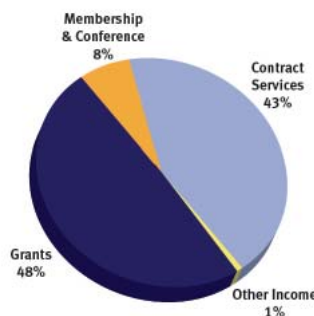
## accountability

### laUW Operations

2011 Expenses By Program Area



2011 Revenue By Source



laUW continues to maintain financial records that are favorably audited each year. The annual financial performance is under budget. The laUW Finance Committee monitors United Way Standards of Excellence for United Way operations and current nonprofit standards. An active Finance Committee provides oversight and advice on financial operations. A copy of the audited financial statement is available upon request. In addition, the IRS Form 990 is posted online at [www.guidestar.com](http://www.guidestar.com).

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