

# UNITED WAY NEWSLETTER

January 2015

vol. 2 no. 1

LIVE UNITED

## Your Donation in Action

The United Way of Story County (UWSC) 2014 LIVE UNITED campaign recently concluded, and the generosity of Story County has resulted in another record-breaking total—**\$2,058,833!** With that significant amount of money, you might be thinking, “How does my donation get to where it’s needed?”

To put it simply, the money is allocated. But it’s not just divvied out at random. The money is allocated one way through a unique and effective process through ASSET (Analysis of Social Services Evaluation Team). The ASSET process has existed in Story County since 1985, and it includes five major funders of human services programs: Central Iowa Community Services, City of Ames, Iowa State University Government of the Student Body, Story County and UWSC. The funders work together in a collaborative, volunteer-led effort to coordinate local planning, assess needs, evaluate the capabilities of agencies to provide programs and recommend funding for programs.

ASSET holds annual hearings in January for review of agency budget requests. Each human services agency completes an application and attends the hearings to advocate for their programs with the hope their financial needs will be met by one or more of the funding sources. UWSC brings money to the table, as do the other funders, and the volunteers make recommendations on how the money should be allocated. Individual funders then review these recommendations and make the final decision on each program. The process is fairly complex, but you can be assured UWSC and ASSET are diligent about identifying the needs in the community and

making the best funding decisions to meet those needs. Volunteers serve a three-year term, and each funder looks to recruit individuals to serve.

In addition to funding programs through ASSET, UWSC offers a year-round grants program. Grants are evaluated on a monthly basis by a team of volunteers and the Board of Directors. Grants can be submitted for projects or programs that are pilots meeting newly-identified needs or for those that are experiencing an increase in expenses. This source of funding has been vital to several programs in the past, such as the kitchen at ACPC’s new location, the opening of Primary Health Care and books for Reach Out and Read through Raising Readers of Story County. Partner agencies or non-partner agencies working in the areas of education, income and health are eligible to apply.

In the end, we all know it’s not about the money, but we know the money makes a difference. We invite you to look around to find your donation at work on a daily basis. When you see children participating in a summer education program, know they are avoiding summer learning loss because you cared. When you hear about families struggling with hunger, know they can access healthy food due to your support. Finally, when you see a senior receiving assistance to be able to stay in his or her home longer, know that he or she has been helped through programs you’ve supported.

With your help, UWSC advances the common good in the areas of education, income and health—the three building blocks for a good quality of life—to make a big difference in Story County. Thank you for helping the community LIVE UNITED!

### Inside

2014 ROI	2
\$2 Million Campaign	3
Leadership Impact	3
Oleson Legacy	4

### EDUCATION

- *Prevention strategies*
- *Outreach/advocacy services*
- *Access to building blocks for academic success*

### INCOME

- *Basic/emergency needs met*
- *Movement toward self-sufficiency*

### HEALTH

- *Affordable/accessible essential services*

United Way of Story County

[uwstory.org](http://uwstory.org)

GIVE. ADVOCATE. VOLUNTEER.

LIVE UNITED



United Way of Story County

## Highlights

- › 2014 Campaign = \$2,058,833
- › 2014 Impact = \$3,370,578
- › 2014 ROI = \$1.64 for every \$1 donated
- › More than 9,600 volunteer hours were donated
- › Conservative estimates were used

# 2014 Return on Investment

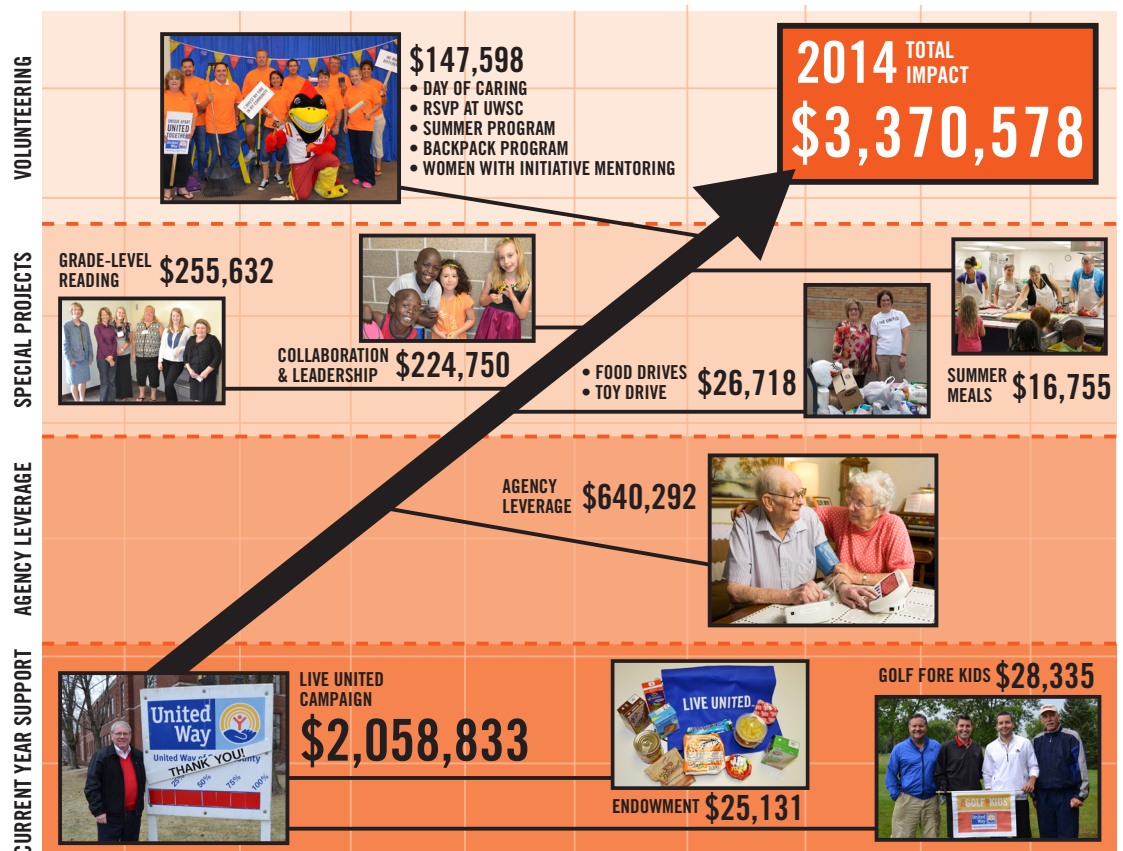
**An investment in United Way is the best way to help the most people in Story County.**

The annual campaign is a great start in our collective efforts to improve the education, income and health of Story County, but did you know the value of your contribution is even greater than the dollar amount? We conservatively estimated the return on your investment when you donated to the 2014 LIVE UNITED campaign. We found that for every dollar you contributed to UWSC through the annual campaign, you actually received a \$1.64 return on your investment. Please see the graphical breakdown below.

Let's start at the bottom. Current year support, which includes the LIVE UNITED campaign, Endowment donations and Golf Fore Kids fundraising resulted in our announced campaign total: \$2,058,833. Next, some UWSC program partners used

their allocations to leverage additional revenue, resulting in \$640,292. Another \$523,855 can be added through collaborations and special projects such as Grade-Level Reading and the summer food program. Finally, \$147,598 has been saved to UWSC and partner agencies due to UWSC mobilizing volunteers for the Day of Caring, the summer program, Women with Initiative mentoring and more.

We added all those figures together, and the 2014 total impact adds up to \$3,370,578. We did a little math with that number and the campaign number using a percentage change formula, and it results in a \$1.64 return on investment for every \$1 donated. You should feel really good about that return! We couldn't do what we do without supportive businesses, partner agencies providing much needed services and a very generous community.





# Two Million Thank Yous!



We truly thank you for impacting the education, income and health of individuals and families in our community! The countywide total of more than \$2 million is significant, but more importantly, you helped change the lives of your neighbors. That's what it means to LIVE UNITED!

**TRADITIONAL** leadership donations have a profound impact on the mission of UWSC. In 2014, leadership donations of \$1,000 or more accounted for 45% of contributions and totaled 471 gifts. Of that amount, there were 76 new gifts and 395 returning contributions.

**TOCQUEVILLE SOCIETY** donations are leadership gifts of \$10,000 or more. This group is a nationally recognized component of United Ways and named after the creator of the first United Way, Alexis de Tocqueville. United Way of Story County had three Tocqueville Society donations in 2013. In 2014, a large leap was made – eight Tocqueville Society donations were received as of the announcement. More information on Tocqueville Society will be available on the UWSC website soon.

**WOMEN WITH INITIATIVE** (Wwl) held its second annual luncheon in 2014 with 80 people in attendance to hear about how growing up in poverty impacts a child's chance of educational success. After outlining seven factors that appear differently in impoverished children, the program connected how Wwl's financial education classes can build a pathway out of poverty. Since it began more than six years ago, Wwl has touched the lives of hundreds of women and their families. Participants attend workshops on basic personal finance, work with trained community mentors, have the opportunity to grow their knowledge through topic-specific workshops (ex: how to cook on a small budget) and can even apply for a scholarship to increase their earning power through continued education. This year, 37 gifts will fund Wwl work, including grants from Bank of the West, Beta Tau Delta, Thiesen's and Wells Fargo.

The **YOUNG LEADERS SOCIETY** (YLS) is comprised of donors age 40 and younger contributing at least \$250. In its fourth drive, the group has grown to 120 members. YLS started the 2014 drive with a special kickoff at the Jack Trice Club Level, featuring a speaker whose life has been touched by United Way funding. YLS continued activities throughout the fall season with a Day of Caring team, a gently-used book drive for children and parents and an educational session featuring Raising Readers of Story County volunteers to discuss dialogic reading with children.

Last year, **ENDOWMENT BUILDER** was introduced as a new recognition level for those who contribute at least \$1,000 annually to the Endowment, and 15 donors have committed so far. UWSC continues to rely on annual gifts to make immediate impact and encourages Endowment donations to help plan for future needs.

*The names of donors will be released in a subsequent newsletter.*

## Division Volunteers and Impact

### LEADERSHIP - 471 gifts

*Campaign Chair:* John Kinley

*Leadership Chair:* Jonathan Wickert

*Leadership Assistant:* Yvonne Kinzler

*General Leadership Committee:* Jane Acker, Scott Bauer, Gary Botine, Mary Christy, Dan Culhane, Brian Dieter, Rick Hugdahl, Roger Kluesner, Steve McGill, Mike Roof, John Russell, Rick Schreier, Chris Snyder, Scott Zahnl

*ISU Leadership Chair:* David Spalding

*ISU Leadership Committee:* Pete Englin, Tom Hill, David Holger, David Miller, Lisa Nolan, Julie Nuter, Jenn Plagman-Galvin, Jamie Pollard, Sarah Rajala, Beate Schmittmann, Jonathan Wickert

### BALLARD - \$91,418

Jeremy Arends, Andrea Ashley, Stephanie Baker, **Mike Manock**, Mindi Perrine, Marge Sheldahl, Marigrace Sievers, **Penny Soat**, Kaitlyn Vasey, Ashley Vaughn

### COMMERCIAL - \$140,014

Shelina Ashlock, Andy Ask, Kim Behrendt, **Adam Boeding**, **Joel Jacobsen**, Lisa Keigley, Kurt Matthewson, Amy Melohn, Dave Tucker

### IOWA STATE UNIVERSITY - \$392,852

*ISU Campaign Chair:* Beate Schmittmann

*ISU Leadership Chair:* David Spalding

*ISU Cabinet:* Theresa Boettcher, Pete Englin, Julie Johnston, Shirley Knipfel, Julie Lelonek, Janet Lovell, Gregory Palermo, Carla Persaud, Melissa Rowan, Monica Sasse, Lisa Sebring, Gaye Simonson, Jonathan Wickert, Rose Wilbanks

*ISU Unit Volunteers:* Chelsey Aisenbrey, Brenda Allen, Joe Colletti, Kasie Doering, Laura Doering, Laurie Engleen, Cheryl Ervin, Tara Fisher, Tillie Good, Judy Hankins, Steve Jones, Steve Karsjen, Audrey Kennis, Stacy Kilstofte, Janet Lovell, Terry Mason, Bette Maybee, Dynette Mosher, Carla Persaud, Sandra Peterson, Allison Reich, Katy Rice, Erin Rosacker, Melissa Rowan, Lisa Sebring, Laura Wille

### MAJOR FIRMS - \$587,147

Sarah Battani, Jerry Busta, Kathy Dubansky, CoAnne Hartmann, Keri Kain, Sara Lehman, Matt Nelson, Angela Ossian, Lisa Packer, Randi Peters, Laurie Rohlfing, Becky Stadlman, Graig Stensland

### MEDICAL - \$251,464

*MGMC:* Amber Deardorff, Teresa Stolfus

*McFarland Clinic:* Shelley Goecke, Joyce Johnston, Marcia Kent, Roger Kluesner

### NEVADA - \$130,410

Jon Augustus, Vicki Barker, Loyd Brown, Mark Cahill, **Sara Clausen**, Wayne Clinton, Ros Dunblazier, Steve Gray, Rick Hugdahl, Doug Johnson, Carolyn Manning, Ralph Manning, Adam Riedell, Leah Schmidt, **Robb Schmidt**, Carolyn Shaw, Ken Shaw, Renee Twedt, David Weber, Tiffany Wingert

### PROFESSIONAL - \$74,193

### PUBLIC SERVICE - \$41,933

*City of Ames:* **Jaclyn Anderzhon**, Lynne Carey, Matt Emerson, Kris Evans, Rich Higgins, Rich Iverson, Katie Kole, Charlie Kuester, Melissa Mundt, Bill Schmitt, Nancy Shaw, **Jessica Spoden**, Jason Tuttle

*Gilbert Schools:* Lindsey Beecher

### RETIRED - \$230,034

Irene Beavers, Paul Brackelsberg, **Phyllis Crouse**, Nels Lersten, Harris Seidel, **Janice Walter**

### ROLAND/STORY CITY - \$71,645

**Jenny Benedict**, Shannon Bryan, Brandon Geise, David Loupee, Mary Loupee, Valaree Muhlenburg, Rick Schreier, Veronica Vaughn, **Daren Westercamp**

### WOMEN WITH INITIATIVE - 37 donations

Tanya Anderson, Nicole Gebhart, Liz Hertz, Lynn Whisler, Elizabeth Wilt-Cable

### YOUNG LEADERS SOCIETY - 120 members

Bret Bartholomew, **Angela Carl**, Damien Corrieri, **Amber Deardorff**, Stephanie Gott, Jennifer Hanson, Kristen Kane, Jenny Pollard, Melissa Rowan, Jacob Talbott, Jenni Talbott, Matt Vaughn

# The Oleson Legacy

## Frankee and Jim Oleson plan to leave 100% of their estate to charity.

In retirement, Frankee and Jim Oleson's first focus was to take some time to seriously think about how they would leave a legacy. And what a legacy they will leave! After a very thoughtful process, the Olesons made a decision to donate 100% of their estate to charity, and United Way of Story County will receive a generous portion.

While Frankee is no stranger to UWSC, having served as a member of the Board of Directors for four years and then as the Executive Director for ten years, the Olesons have been supporters long before her tenure as a volunteer and staff member. Frankee recalls her first memory of supporting United Way when she was teaching at the Gilbert School District. The employees received cards promoting United Way in their pay envelopes, and she remembers asking a colleague in her carpool, "What is this?" Her colleague replied, "You should support them; they do good things." It was then, in the mid-1970s, that Frankee wrote the Oleson's first check to the organization.

The Olesons continue to believe what they learned nearly 40 years ago in a carpool. "United Way of Story County does good things for the community," said Jim. "And we love this community, so we continue to support United Way's work."

While the Oleson's enthusiasm for the community hasn't changed, Frankee knows United Way of Story County as an organization has evolved. UWSC has grown – not just in the amount of money raised and how the money is allocated but in the number of partners and communities involved as well. To fully serve all of Story County, she explained, United Way needed to ensure partner agencies were researching how they were providing services in order to show the organization really did have a presence countywide. That effort – funding programs vs. agencies and measuring outcomes – kicked off what is currently referred to as community impact, and the movement has made a significant impact on UWSC's work.

Even in retirement, the Olesons continue to make an impact on this community. "We believe in local philanthropy," Frankee says. "There is so much good in our community, but there are also so many people in need. It's been wonderful to see how this community recognizes issues and subsequently helps to take care of problems."

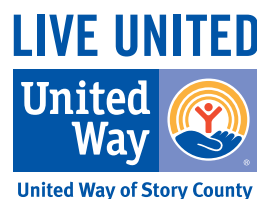
And after they're not here to make an impact with their annual gift, the Oleson legacy will continue to support UWSC. "Making a difference today is important, but we also believe in the idea of planning for the future," said Jim.



Frankee and Jim Oleson recently went through an exercise to determine how their estate should be allocated when the time comes.

Jim said, "It took an effort, but we're glad we took the time to do it. When we were done, we thought 'Wow! This is our legacy.'"

The Olesons hope to inspire others to consider estate planning. "Truly, anybody who believes in philanthropy can make an impact," said Frankee. "You don't have to give a huge gift, and there are ways to be philanthropic in your estate, regardless of your family situation."



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