



2021 ANNUAL REPORT

READY TO LIVE **United**

United
Way



United Way of
Northeastern MN

OUR MISSION

To unite and focus our communities in creating measurable results to improve people's lives and strengthen our families.

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Dear friends,

This is my second year writing a letter like this to you, and I can see already that there are several sentiments that will ring true year after year as United Way of Northeastern Minnesota (UWNEMN)'s executive director:

I am extremely proud of the success of our programs.

I am overwhelmingly humbled by the generosity of our donors and volunteers.

And I am incredibly grateful for the collaboration of our agency partners.

I may say variations of these phrases each year I am in this role but please know it's not because I can't come up with new ideas; it's because those three sentences are the crux of what we do at UWNEMN and what makes it all possible. Each year, these sentiments feel just as important – maybe more important – to say than the last.

This year in particular, I find the impact of our programs and partner agencies and generosity of our donors and volunteers truly remarkable. Together, despite so many remaining challenges, we united to make a difference and lift up the lives of people in our community day in and day out.

As much as we wish it to be otherwise, the unfortunate reality is that times do remain challenging – both for people living and working in our region and the businesses, schools, and organizations that serve them. But in addition to hardship, challenging times create opportunity.

In the past year, UWNEMN has had the opportunity (and privilege) to collaborate with changemakers across the region – and sometimes state – to meet the most pressing needs in our communities. In addition to our “regularly scheduled programming” we've united to deliver school supplies, winter clothing, and basic need supplies to schools across the region. We've added new partnerships in our Koochiching County and Lake of the Woods County service area to bring our programming to more communities. We've had community members step up to donate both funds and time in ways we didn't expect. We've worked together to change lives.

This work truly is lifechanging; both for people who benefit from your generosity and for those who get involved with UWNEMN and see the impact they're making. Throughout this year's annual report, you will hear directly from a few of the people – teachers, agencies, volunteers, donors – who played key roles in this impactful work this year.

As you read, I hope you join me in looking to the future. What opportunities still lie ahead of us to make significant and long-lasting change in our region? How can we build on the momentum of 2021 to address all the work that is still to be done?

Whatever unique opportunities present themselves, trust UWNEMN's approach will remain constant – we are ready to take action. We are Ready to Live United.

To those of you who are already committed to being with us in this work, thank you. To those of you ready to join us, welcome aboard. We look forward to having each and every one of you alongside us as we strengthen our communities and improve lives across our region.



With gratitude,

Erin Shay
Executive Director
United Way of Northeastern Minnesota

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OUR IMPACT



United Way of
Northeastern MN



FOR THE 2021-2022 CAMPAIGN SEASON, YOU UNITED TO RAISE

\$1,880,000 TO SUPPORT

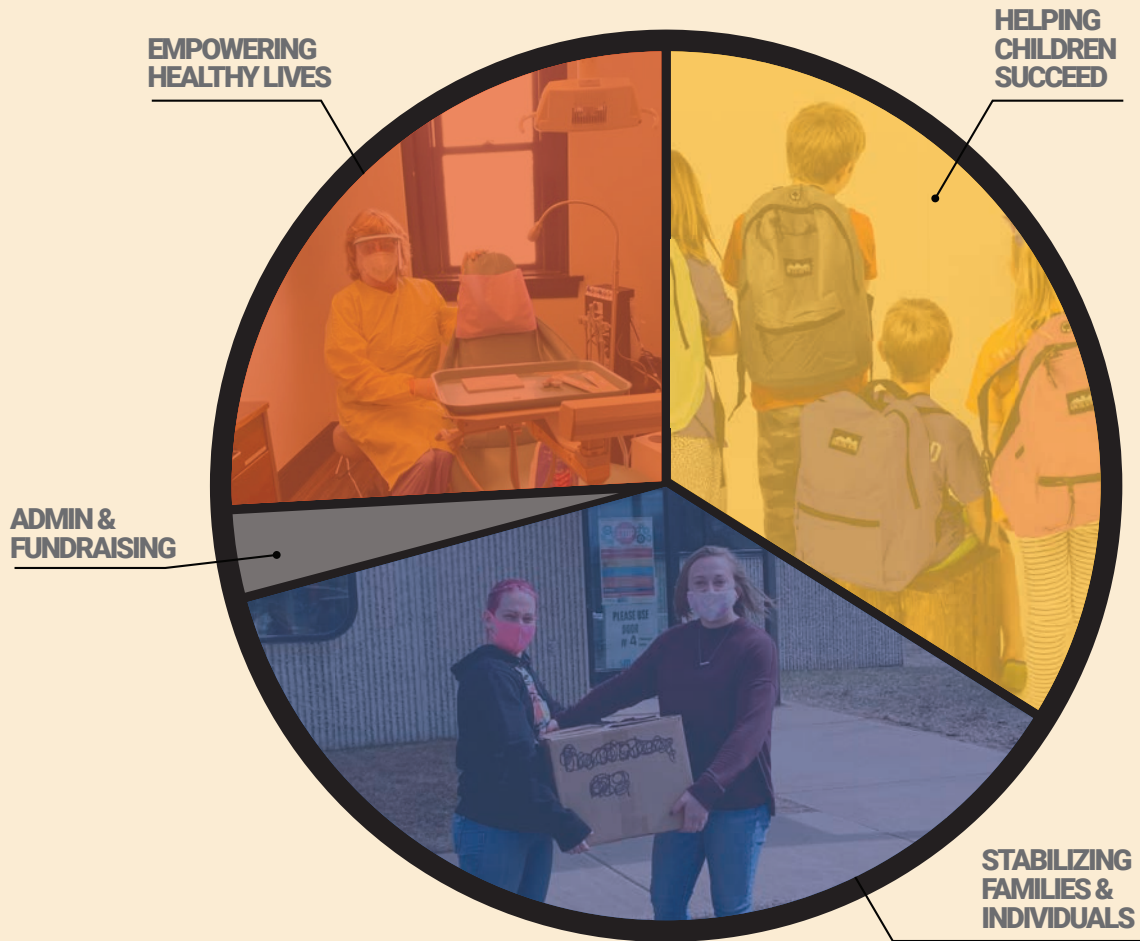
46 NONPROFIT AGENCIES AND PROGRAMS

OUR SERVICE AREA

We are proud to serve anyone living or working on the Iron Range, in Koochiching County, and in Lake of the Woods County. UWNEMN's work on the Iron Range is supported by fundraising on the Iron Range, and UWNEMN's work in Koochiching and Lake of the Woods Counties is supported by fundraising in those communities.



AMOUNT INVESTED BY FOCUS AREA



32.2%

**STABILIZING
FAMILIES &
INDIVIDUALS**

31.2%

**HELPING CHILDREN
SUCCEED**

27.4%

**EMPOWERING
HEALTHY LIVES**

9.2%

**ADMIN &
FUNDRAISING**

HELPING CHILDREN SUCCEED



10 first and second graders were matched with local mentors



In the **2021** school year, Lunch Buddies was re-piloted in two schools

“Kids measure caring by quantity of time. They judge how much someone cares about them by how much time someone spends with them.”

– Northwood Children’s Services & Families and Communities Together (FACT) Training Consultant Dr. Dean Grace’s training for Lunch Buddies mentors.

Dr. Grace’s research highlights “simple – not easy” ways proven to build resiliency in children and set them up for success, including: reading together regularly, sharing meals, and talking about their interests.

Donations to UWNEMN are invested in programs and agencies utilizing those exact strategies to Help Children Succeed in our region.

One growing UWNEMN program seeking to Help Children Succeed is the Lunch Buddies mentoring program, which was first piloted in 2020 in Hibbing schools, pairing 16 local adults with first graders in need of additional positive adult role models. The original pilot program was cut short due to the COVID-19 pandemic, but it returned in the spring of the 2021 school year – this time at Keewatin Elementary School and Merritt Elementary School in Mountain Iron.

Lunch Buddies mentors and mentors will meet each week through the remainder of the school year, sharing lunch, playing games, and building connections. Other schools across the region have already voiced interest in bringing Lunch Buddies to their school next school year.

If you’d be interested in volunteering to become a Lunch Buddy in your community, please contact sarah@unitedwaynemn.org.



1,263 students tutored or mentored



29,968 Imagination Library books mailed



18 youth received chemical dependency counseling

IN 2021, YOUR SUPPORT OF UWNEMN IN-TURN SUPPORTED THE FOLLOWING NON-PROFIT AGENCIES AND UWNEMN PROGRAMS:

Arrowhead Center

Adolescent Chemical Dependency Support

Bright Beginnings

Quality Childcare Center Development

Ely Community Resource

Positive Activities & Mentoring Program for Youth

Girl Scouts Lakes & Pines

Mentoring & Community Outreach

Imagination Library

Free Books for Children Ages 5 and Under

Lunch Buddies Mentoring Program

Mentoring for First and Second Graders

ServeMinnesota – Reading Corps

Reading Tutoring

Summer Work Outreach Project (SWOP)

Youth Mentoring & Community Outreach

Volunteers in Education (VinE)

Tutoring for Students & Classroom Support for Teachers

Voyageur Area Council, Boy Scouts of America

Mentoring & Community Outreach



We were also proud to call Camp Chicagami a UWNEMN Partner Agency though they were unable to hold programming in 2021.

EMPOWERING HEALTHY LIVES



290 individuals received medical care from Ely Community Health Center in 2021



92% of Ely Community Health Center patients are living in poverty



With your support, UWNEMN was one of Ely Community Health Center's top 5 funders in 2021



“United Way’s consistent financial support of ECHC since our first year has been crucial to the stability, success and growth of our organization and has enabled us to increase access to health care services and meet a critical need in a population that is underserved and at risk for poor health outcomes.”

– Ely Community Health Center Board Member Kristine Mosher

In 2015, the free clinic in Ely closed. By 2016, volunteers from the former clinic saw the unmet need left by the closure and sprung to action, creating the Ely Community Health Center. In the last five years, the clinic has grown from serving 120 to 300 patients annually. The clinic attributes much of this success to the hiring of a paid executive director, made possible in part by support from UWNEMN.

When you unite your dollars with others across the region, you are making life-saving work like Ely Community Health Center’s possible.

In the past year alone, Ely Community Health Center (ECHC)’s services have grown to include: weekly medical clinics for acute and chronic health conditions, insurance navigation services, hypertension screenings at the Ely Farmers Market and Ely Senior Center, a monthly cooking and nutrition class for local seniors, and the addition of dental services.

New ECHC Executive Director Helen Tome says the organization’s biggest accomplishment in 2021 was continuing services throughout the COVID-19 pandemic while growing to include dental care.

“Dental has been a huge focus area in our community, and we’ve been able to make leaps and bounds in the past year,” she said.

Donations to UWNEMN made a “huge difference” to ECHC throughout 2021, she added.

“Without the continuous support from our area (UWNEMN) donors we would not be able to operate ECHC,” she said.



746 patients served at free clinics



2,306 Smiles United dental care appointments



541 seniors received assistance

IN 2021, YOUR SUPPORT OF UWNEMN IN-TURN SUPPORTED THE FOLLOWING NON-PROFIT AGENCIES AND UWNEMN PROGRAMS:

Angel Fund

Financial Support for Individuals with Cancer

Care Partners

Financial Support for Individuals with Cancer & Life Limiting Illnesses

Ely Community Health Center

Free Clinic for Uninsured & Under-insured

Northwoods Partners

Support for Homebound, Ill, Elderly, & Caregivers

Project Care Free Clinic

Medical Services for Uninsured & Under-insured

Smiles United

Free and Reduced Cost Dental Care for Uninsured and Under-insured Individuals of All Ages



299 individuals facing cancer and life-limiting illness were financially supported

STABILIZING FAMILIES AND INDIVIDUALS



1,000 children currently enrolled in Buddy Backpacks

It costs **\$6** to fill a Buddy Backpack meal kit



35,000 Buddy Backpacks distributed in the 2021-2022 school year

“The kids appreciate that somebody ‘sees’ them and cares enough to quietly help.”

– school staff member response to recent Buddy Backpacks survey

Your gifts to UWNEMN are invested in programs and agencies that meet immediate needs for neighbors in crisis, and oftentimes meeting these short-term needs has long-term effects.

Take, for example, UWNEMN’s Buddy Backpacks program. The program provides nutritious, child-friendly meal kits to 1,000 local children at-risk of hunger every weekend and holiday break of the school year.

School staff, families, and service providers across the region agree the immediate impacts of the program are undeniable. When children receive Buddy Backpacks, their school attendance improves, their energy levels increase, and indicators of health improve.

Not as easy to see but just as important are the ramifications the program will make for enrolled children into adulthood. Children who do not have to worry about food are children set up for healthier, more successful futures.

UWNEMN’s work to address childhood hunger does not end with the school year. In the summer months, our Meet Up and Chow Down program provides free summer lunches to any children ages 1-18, regardless of income-level.

In the summer of 2021, Meet Up and Chow Down lunches were served at nine sites in the communities of Aurora, Chisholm, Hibbing, Mt. Iron, Nashwauk, and Virginia. Volunteers handed out more than 11,000 Meet Up and Chow Down lunches – up from 8,000 from the previous summer.

A USDA-approved meal vendor and volunteer base is needed to bring Meet Up and Chow Down to new communities. If you would like to bring this program to your community and can help secure a meal vendor and/or coordinate volunteers, please contact michelle@unitedwaynemn.org!



2,583,045 pounds of food distributed



50 veterans in need received United for Veterans holiday meal kits



402 individuals obtained housing



2,249 individuals in crisis accessed Comforts of Home



\$93,160 distributed in COVID-19 funding

IN 2021, YOUR SUPPORT OF UWNEMN IN-TURN SUPPORTED THE FOLLOWING NON-PROFIT AGENCIES AND UWNEMN PROGRAMS:

Advocates for Family Peace

Domestic Abuse Intervention & Education

American Red Cross

Disaster/Emergency Services

Buddy Backpacks

Meal Kits for Food-Insecure Children Every Weekend and Holiday Break of the School Year

Comforts of Home

Home Essentials for Displaced or In-need Individuals

COVID-19 Recovery Fund

Financial Assistance by Individuals Who Lost Work Due to COVID-19

Food Shelves Area Wide

Food Distribution to Those in Need

Meet Up and Chow Down

Free Summer Lunch for Children Ages 1-18

North St. Louis County Habitat for Humanity

Affordable Housing Program

Range Transitional Housing

Transitional Housing

Salvation Army – Hibbing

Food and Emergency Services

Salvation Army – Virginia

Food and Emergency Services

Second Harvest

Northern Lakes Food Bank

Food Distribution to Regional Food Shelves

Sexual Assault Program of Northern St. Louis County

Sexual Assault Intervention & Education

Support Within Reach

Sexual Assault Intervention & Education

United for Veterans

Transitional Home, Crisis Funds, Retreats, Military Connections Guide, Veterans Wellness Passport



11,124 Meet Up and Chow Down lunches distributed

807 survivors of violence supported



50 veterans signed up for Veterans Wellness Passport program



KOOCHICING COUNTY & LAKE OF THE WOODS COUNTY



150 children are enrolled in Buddy Backpacks in Koochiching County



7 volunteers deliver Buddy Backpacks each month in Koochiching County

5,250 Buddy Backpacks distributed in 2021-2022 school year

“We know it’s a huge issue, kids not having enough food in our communities, and they (the team) know some of the kids receiving Buddy Backpacks. This program makes a huge difference. We take it for granted, having food at home.”

– International Falls Broncos Football Team Varsity Assistant Coach Jerad Kostiuik

Each year, UWNEMN provides grants to non-profit agencies and programming in Koochiching County and Lake of the Woods County, supported by fundraising in those communities. Fundraising in each community is as unique as the communities themselves.

In 2021 for example, International Falls Broncos Football Team decided to tackle the issue of childhood hunger, selecting UWNEMN’s Buddy Backpacks program as the beneficiary of their Touchdowns and Turnovers program.

Touchdowns and Turnovers, now in its third year, has raised more than \$18,000 for local programs and agencies since its inception by asking local businesses for sponsorships then asking fans to donate during every touchdown and turnover of each home game to benefit the selected program of the year.

The team also sold t-shirts with proceeds going to Buddy Backpacks.

The football team isn’t the only team supporting Buddy Backpacks in Koochiching County. A dedicated team of volunteers, led by Mike Silvers and Julie Ehrman distributes the weekend meal kits to schools throughout the county each month. The meal kits are transported from Chisholm to International Falls each month by Minnesota Industries.

UWNEMN hopes to expand its reach in Koochiching County and Lake of the Woods County in the coming year. If you are interested in getting involved and supporting our work locally, please contact erin@unitedwaynemn.org.





1,605 violence survivors supported



4,984 Imagination Library books mailed



287,357 pounds of food distributed



58 Smiles United patients

IN 2021, YOUR SUPPORT OF UWNEMN IN-TURN SUPPORTED THE FOLLOWING NON-PROFIT AGENCIES AND UWNEMN PROGRAMS IN KOOCHICHING COUNTY:

Buddy Backpacks

Meal Kits for Food-Insecure Children Every Weekend and Holiday Break of the School Year

Falls Hunger Coalition

Food Distribution to Those in Need

Friends Against Abuse

Abuse Intervention & Education

Imagination Library

Free Books for Children Ages 5 and Under

Koochiching Aging Options

Senior Programming

Salvation Army – International Falls

Emergency Food, Shelter, and Utility Assistance

Smiles United

Free and Reduced Cost Dental Care for Uninsured and Under-insured Individuals of All Ages

United for Veterans

Crisis Funds, Retreats, Military Connections Guide, Veterans Wellness Passport

UWNEMN is proud to serve as the fiscal agent for International Falls' Community Cancer Walk!

IN 2021, YOUR SUPPORT OF UWNEMN IN-TURN SUPPORTED THE FOLLOWING NON-PROFIT AGENCIES AND UWNEMN PROGRAMS IN LAKE OF THE WOODS COUNTY:

Imagination Library

Free Books for Children Ages 5 and Under

Lake of the Woods Food Shelf

Food Distribution to Those in Need

United for Veterans

Crisis Funds, Retreats, Military Connections Guide, Veterans Wellness Passport

VOLUNTEERS



United Way of
Northeastern MN



“Just get started somehow, because once you do – once you learn about our United Way and what it does, you’ll be hooked.”

*– UWNEMN volunteer
Ray Erspamer*

More than 40 years ago, the Erspamer family lost everything they owned to a house fire in the dead of winter.

Not long after, the American Red Cross reached out and helped the family get needed items like clothing, jackets, and boots, immediately.

“I said we didn’t need it; we had insurance,” Ray Erspamer remembers. “They said it didn’t matter.”

Afterwards, when Ray was approached by coworkers at Hibbing Taconite and told they needed help with UWNEMN’s campaign there, he volunteered.

“I said I’d been helped (by a UWNEMN partner agency), so I’d help,” he said.

Despite his discomfort with public speaking, Ray shared his story to encourage others to help people in need.

“Everyone thinks if they have a good job, they won’t need help,” he said. “I had a good job. I had good insurance. I had everything you’re supposed to have.”

In the years to follow, Ray’s volunteer roles with UWNEMN evolved, becoming the first “loaned employee” helping the (at-the time) one-person office in any capacity he could. From there, he served as a board member, board president, “and now,” he says with a smile, “back to a worker.”

Today, Ray picks up boxes of donated goods from partner stores across the state and delivers them to UWNEMN’s building for the Comforts of Home program each month with wife Deb. Each week, he picks up boxes of Buddy Backpacks at UWNEMN’s building and delivers them to the majority of schools across the region. Ray is considered a “lifetime lifesaver” for UWNEMN.

What keeps him so invested in UWNEMN?

“Once you understand what our local United Way does, you’re hooked,” he said. “If I run into someone who needs help, I know I can call UWNEMN. And maybe they can’t fix it all, but they can get them on the path they need to solve – or at least contain – their problem.”



2,500+ volunteer hours packing Buddy Backpacks



936 volunteers staffed 2021 Meet Up and Chow Down sites



125 volunteers helped at UWNEMN events

VOLUNTEERS ARE THE BACKBONE OF OUR ORGANIZATION

As a staff of six full-time and one part-time employees, with a service area reaching from International Falls to Saginaw and Pengilly to Winton, there is no way we could provide the programming we do to families and individuals in our region without the support of volunteers.

Volunteer opportunities are far-ranging – both in time and tasks. Just as one dollar per person makes a tremendous impact in our community, so does one hour per volunteer.

Campaign volunteers help UWNEMN raise funds at workplaces across the region. The most successful workplace campaigns are the ones employees make their own. How can you help? Encourage your workplace to host a UWNEMN campaign if they don't already, sign on as a volunteer to hand out materials or present to your coworkers, and/or implement activities to increase engagement like Minnesota Power's 2021 Icy Dip!

OTHER UWNEMN VOLUNTEER OPPORTUNITIES INCLUDE:

- Packing Buddy Backpacks
- Mentoring through Lunch Buddies
- Handing out Meet Up and Chow Down lunches
- Stocking Little Free Libraries
- Organizing Comforts of Home shelves
- Helping with Events
- Partnering with a Partner Agency
- Building Projects
- Office Projects



3 dedicated volunteers deliver Comforts of Home goods to UWNEMN building year-round

Visit www.unitedwaynemn.org/volunteer for current volunteer needs!

EVENTS



United Way of
Northeastern MN

THANK YOU 2021 CORPORATE EVENT SPONSORS



Fairview



In 2021, many of our events were once again canceled or altered due to safety concerns surrounding the COVID-19 pandemic. Luckily, as an independently run organization, UWNEMN is able to adapt to changes quickly, our staff is highly skilled in thinking on their feet, and our community remained committed to supporting UWNEMN throughout another challenging year.

Our most unique event change in 2021 was Flavor of the North Restaurant Month. For the month of May, UWNEMN promoted participating restaurants, and people across the region visited the restaurants to try the featured meals, voting for their favorite at the end of the month. Participating restaurants were also eligible for one of three \$2,500 COVID recovery grants thanks to a partnership with IRRR.

Diners supported local restaurants with their food purchases and supported UWNEMN's Buddy Backpacks through a corresponding virtual auction. Thank you to all who supported this unique twist on a favorite event, and congratulations again to Billy's Pit Stop Pub N Grub (best appetizer); Bailey's Courtyard Café (best entrée); and Black Bear Bakery, Kunnari's Kitchen & Coffee House, and Later Tater (tied for best dessert)!

Not all our events were held virtually! Of note, our newest event, the Renegade Trail Run 25K and 5K brought together hundreds of trail runners, trail enthusiasts, and families from across the Midwest to Redhead Mountain Bike Park in Chisholm. The 25K was for avid trail runners while the 5K had waves for competitive runners, noncompetitive runners, and walkers. The fastest runners for both the 25K and 5K received awards, and all participants received Renegade shirts. The event was held as a fundraiser for the United for Veterans program, and all participating veterans received Renegade challenge coins.

While it supported our 2021 campaign year, we were thrilled to kick off the 2022 calendar year with a BANG, bringing Power of the Purse back in person January 27, 2022, at Iron Trail Motors Event Center for a Totally 80's themed event to support Imagination Library.

Whether you attended our events in person or from home, you made a difference. With your support, 2021 events raised more than \$135,000!



Big Buck Contest



**Renegade Trail Run
25K and 5K**



Power of the Purse



**Take a Swing
at Hunger**



**Making
REEL
Change**

2021 UWNEMN EVENTS

Flavor of the North Restaurant Month

Food Competition Supporting Local Restaurants + Online Auction Supporting Buddy Backpacks

United for Veterans Cash Raffle

Cash Raffle Supporting United for Veterans

Take a Swing at Hunger

\$10,000 Golf Ball Drop Supporting Buddy Backpacks

Renegade Trail Run 25K and 5K

Trail Run Supporting United for Veterans

Bucks for Backpacks Cash Raffle

Cash Raffle Supporting Buddy Backpacks

Big Buck Contest

Big Buck Contest Supporting Imagination Library

Funspiel Auction

Online Auction Supporting Smiles United

Making REEL Change

Virtual Ice Fishing Tournament Supporting Smiles United

Power of the Purse

Ladies Event Supporting Imagination Library program.



**Flavor of the North
Restaurant Month**



**United for
Veterans
Cash Raffle**

**Bucks for
Backpacks
Cash Raffle**



2021 UWNEMN CAMPAIGN LEADERSHIP AWARD: POLYMET MINING CO.

“PolyMet is proud to support the United Way of Northeastern Minnesota because we are passionate about our region and the area where we live, work, and play. We appreciate that the United Way is constantly working to adapt and develop programs to support the ever-changing needs of Northeastern Minnesota.”

– LaTisha Gietzen, PolyMet Mining Co. Public and Community Relations



2021 LEADERS IN CORPORATE GIVING

LOCAL BUSINESSES ARE READY TO LIVE UNITED.
UWNEMN IS GRATEFUL FOR THESE LEADERS IN CORPORATE GIVING FOR THEIR SUPPORT!

\$100,000+



CLIFFS

\$25,000+

Essentia
Minnesota Power
U.S. Steel Minnesota Ore Operations

\$10,000-\$24,999

PCA
CN
Park State Bank

\$5,000-\$9,999

Enbridge Energy
Twin Metals

\$2,500-\$4,999

Glacier Park Iron Ore Properties LLC
Iracore
Barr Engineering
Conveyor Belt Services, Inc.
Teck American Inc.
UPS
MN D&W
Security State Bank
Fortune Bay
Waste Management
Minnesota Industries

\$1,000-\$2,499

CoBank
Lake Country Power
Jasper Engineering
Ameriprise Financial
National Bank of Commerce
Fairway Independent Mortgage Corp.
A1 Rental Services, Inc.
D&D Beverage
Starkovich Distributing, Inc.
W.A. Fisher
Bark Design
Northeast Technical Services

\$500-\$999

First National Bank of Gilbert
DMR
Security State Bank

Tremendous

thanks

**to all individual donors
as well!**

**UWNEMN's individual
Leadership Giving
list will be available**

June 2022

at

www.unitedwaynemn.org/leadership-giving

GIFT PLANNING



DR. GEORGE ERICKSON

“When we look for people we want to help, we go to people we trust.”

– Dr. George Erickson

Growing up in Virginia, Dr. George Erickson says he “was always inspired by people who shared.” Together, he and wife of 65 years, Sally, themselves became people who shared, donating to local organizations and causes through the years, including spurring the creation of the Virginia Indoor Tennis & Pickleball Club.

Sally passed away this past September, and in her honor, Erickson has since presented more than \$300,000 in donations to local organizations – including \$50,000 to UWNEMN. The couple had decided to make this donation prior to Sally’s passing.

“We decided a month before she knew she wasn’t going to last much longer and wanted to do this now,” he said when presenting the donation.

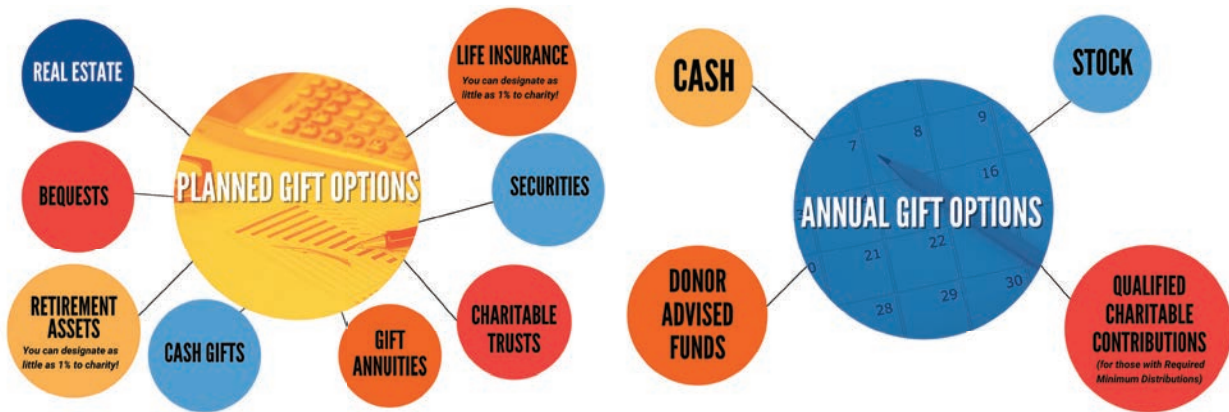
Erickson, a retired dentist, has traveled the world – everywhere from the Arctic to Australia, served on numerous community boards, and has written five books, including a best seller. He chalks up his successes to “growing up in good times, in a good country, with good parents” – and of course, to his late wife.

“Everything that’s worked so well for me couldn’t have happened without her,” he said. “...Without (Sally’s) encouragement and support, none of these contributions would have been possible.”

Erickson said it has given he and his wife “great pleasure” over the years to see their donations in action. He said they chose to donate such a large amount to UWNEMN because of the organization’s reach in the region and the trust local communities have placed in UWNEMN.

He said he hopes the gifts he and Sally have made inspire others to think about charitable giving “before they’re gone.”

GIFT PLANNING



Oftentimes, people have thought of gift planning only upon death, which could include naming a charity or non-profit organization as the beneficiary of certain assets, accounts, or life insurance policies. There are many benefits of doing so, including increasing the amount of the bequest (in the form of tax savings), leaving a legacy in one's own community, and decreasing the estate tax burden for your loved ones.

As the Ericksons' story so touchingly demonstrates, leaving a legacy through lifetime gift planning is another option, and one that allows the donor to witness the impact of their gift.

EXAMPLES OF LIFETIME GIFTING INCLUDE:

Donor-Advised Fund – This is a private fund administered by a third party for the purpose of managing charitable donations on behalf of an organization, family, or individual. These have become increasingly popular due to the ability of donors to maintain control over the placement and distribution of charitable gifts and also for the tax advantages that come with deposits into the fund.

Charitable Gift Annuity – This is an arrangement between a donor and non-profit organization in which the donor receives a lifetime payment based upon the value of assets gifted to the organization. This contract provides the donor with a tax deduction in the year the gift is made, lifetime income each year after that, and allow for the gifted assets to be retained by the charitable organization upon death of the donor. This can be done with a gift as small as \$5,000.

Gifts of Securities – By gifting shares of appreciated stock or bonds from an investment portfolio, donors avoid paying capital gains tax and receive a tax deduction of the gift's fair market value.

Charitable Trusts – These can be useful vehicles for a donor who wants to make a charitable donation but does not want to give an undivided interest to the charity. Utilizing a charitable trust (there are several different kinds) allow the donor to receive a charitable income tax deduction at the time of the gift, retain some right to enjoy the property gifted, and reduce the size of his or her taxable estate.

Gifts of Real Estate - By gifting real estate, donors avoid paying capital gains tax and receive a tax deduction.

If any of these options interest you, we advise speaking with your accountant, lawyer, or financial planner.

UNITED WAY OF NORTHEASTERN MINNESOTA, INC.
STATEMENTS OF FINANCIAL POSITION
MARCH 31, 2021 AND 2020

ASSETS	2021	2020
Cash	\$ 966,973	\$ 516,145
Cash - Deposits Held for Others	55,493	53,683
Investments	331,439	329,769
Contributions Receivable, Less Allowance for Uncollectibles of \$75,000 for 2021 and 2020	454,684	461,382
Prepaid Expenses	661	512
Property and Equipment, Net	1,080,647	1,117,368
Funds Held by Foundation	1,386,970	1,102,785
Funds Held by Lincoln Financial	47,917	33,378
	\$ 4,324,784	\$ 3,615,022
Total Assets		
LIABILITIES AND NET ASSETS		
LIABILITIES		
Allocation and Designations Payable	\$ 302,310	\$ 287,250
Deposits Held for Others	55,493	53,683
Accounts Payable	21,812	20,967
Capital Lease Payable	5,197	7,224
Total Liabilities	384,812	369,124
NET ASSETS		
Without Donor Restrictions - Designated:		
Property and Equipment	1,075,450	1,110,144
Funds Held by Foundation	1,386,970	1,102,785
Without Donor Restrictions - Undesignated	1,437,793	1,010,670
With Donor Restrictions	39,759	22,299
Total Net Assets	3,939,972	3,245,898
Total Liabilities and Net Assets	\$ 4,324,784	\$ 3,615,022

See accompanying Notes to Financial Statements.

UNITED WAY OF NORTHEASTERN MINNESOTA, INC.
STATEMENTS OF ACTIVITIES
YEARS ENDED MARCH 31, 2021 AND 2020

	2021	2020
NET ASSETS WITHOUT DONOR RESTRICTIONS		
PROGRAM SUPPORT AND REVENUE		
Gross Campaign Results	\$ 987,278	\$ 1,048,206
Less: Donor Designations	(7,458)	(8,235)
Less: Provision for Uncollected Accounts	(86,665)	(54,083)
Net Campaign Revenue	893,155	985,888
Contribution Income	326,115	33,058
Initiative Contributions	336,626	265,373
Gifts in Kind - Good 360	201,869	169,580
Special Events	237,606	229,480
Total Public Support	1,995,371	1,683,379
Investment Income	16,229	5,599
Funds Held by Foundation Investment Income (Loss)	335,256	(92,263)
Paycheck Protection Program Loan Forgiveness	52,800	-
Release from Restrictions	-	34,312
Total Revenue	2,399,656	1,631,027
ALLOCATIONS AND EXPENSES		
Allocations and Program Services:		
Gross Allocations to Agencies for Programs	305,883	313,610
Less: Donor Designations	(7,458)	(8,235)
Net Allocations Awarded	298,425	305,375
Initiative Distributions	363,008	482,698
Gifts in Kind Distributions	209,180	179,500
COVID Distributions	165,902	-
Program Services	423,710	416,094
Total Allocations and Program Services	1,460,225	1,383,667
Supporting Services:		
Management and General	99,701	98,980
Fundraising	163,116	145,182
Total Allocations and Expenses	1,723,042	1,627,829
CHANGE IN NET ASSETS WITHOUT DONOR RESTRICTIONS	676,614	3,198
NET ASSETS WITH DONOR RESTRICTIONS		
Contributions	17,460	22,299
Release from Restrictions	-	(34,312)
CHANGE IN NET ASSETS WITH DONOR RESTRICTIONS	17,460	(12,013)
CHANGE IN NET ASSETS	694,074	(8,815)
NET ASSETS		
Beginning of Year	3,245,898	3,254,713
End of Year	\$ 3,939,972	\$ 3,245,898

See accompanying Notes to Financial Statements.



608 East Drive
Chisholm, MN 55719

United Way of
Northeastern MN

RETURN SERVICE REQUESTED

