A LETTER FROM OUR BOARD CHAIR AND PRESIDENT & CEO

As we celebrate our 60th year of service to Yellowstone County, we want to thank you for your partnership and support through the years, and more importantly this past year. Our United Way’s history shows that our organization has always risen to the occasion when our community is most in need. As evidenced during the pandemic and other difficult times in our history, people have proven resilient, determined and compassionate for their neighbors and communities. We continue to be impressed with so many generous individuals and their companies stepping up to help those in need.

Over the course of six decades, United Way of Yellowstone County has invested more than $30 million to our community in the form of allocations, designations, grants, and most recently, immediate need grants in response to COVID-19. United Way is undeterred in our focus to bring sustainable, lasting improvements in the lives of our neighbors and their families.

The impact we’ve made together—and will continue to make for generations to come—is a reflection of the strength of our partnerships and our dedication to making a positive impact on every person who lives, works, and plays in Yellowstone County. Our priority areas—crisis stability, school readiness and success, and senior independence—stand strong because of you.

While we seek resources to meet our neighbors’ most urgent needs, let us remember that we are each determined and compassionate for our neighbors and communities. We continue to be impressed with hundreds of our neighbors get answers during this tumultuous time.

For over 6 months our building was utilized by RiverStone Health as the drive-through COVID-19 testing site. We are honored that our space was able to help so many generous individuals and their companies stepping up to help those in need.

We once again teamed up with Family Promise of the Yellowstone Valley for the Community Diaper Bank drive in coordination with United Way’s annual Day of Action! A grand total of 81,334 items were donated to the Community Diaper Bank!

We are also excited to report that our Operation Supply school supplies drive was another great success! Thank you to our local Navy Ops for helping us deliver the donations to local students!

Cheers to 60 years!

Katie Edwards
Board Chair

Kim Lewis
President & CEO

BOARD MEMBERS

Executive Committee
Brenda Koch, Past Chair
K-12 Executive Director - Leadership Support
Billings Public Schools

Katie Edwards, Chair
VP & Business Banker
Western Security Bank

Bret Rutherford
Election Administrator
Yellowstone County

Matt Schafer, CPA, Treasurer
MK Weeden Construction Inc.

Kristie Jessup, Secretary
Community Volunteer

Directors
Pete Buchanan
Operations & Finance Manager
Montana Campus Compact

Craig Burke
VP/Owner
Entre Technology Services

Theresa Hinz
Process Engineer
Phillips 66

Shawn Hinz, MPH
Vice President of Public Health Services
RiverStone Health

Robby Neihart
Project Manager
Performance Engineering

Pete Philipp
Store Lead
Scheels

Jill Quade
HR Manager
ExxonMobil

OPERATION SUPPLY

Despite COVID limitations, our annual Operation Supply school supplies drive was another great success! Thank you to our local Navy Ops for helping us deliver the donations to local students!

COMMUNITY DIAPER DRIVE

A grand total of 81,334 items were donated to the Community Diaper Bank!

COVID-19 TESTING SITE

STAFF MEMBERS

Chrissy Brese
Support Service Assistant

Marge Damschen
MT 211 Coordinator

Maia Dickerson
Community Impact Coordinator

Michelle Lamberson
Manager, Out of School Time

Kim Lewis
President and CEO

Brenda Ludwig
211 Manager

Lisa McDaniel
Communications and Campaign Coordinator

Pam Sanderson
Volunteer Center Director

Dean Wells
Director of Community Impact

Coral Williamson
Finance Manager

GIVE - ADVOCATE - VOLUNTEER

OPERATION SUPPLY

22 Organizations & Individual Donors
5,000 items
22 Schools

COMMUNITY DIAPER DRIVE

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COVID-19 TESTING SITE

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VOLUNTEER ENGAGEMENT

Disaster Services
• Yellowstone County’s Incident Management Team and Vaccination Task Force
• Coordinated COVID donations and Distribution Center

YouCanVolunteer.org
• 75 engagement partners

Family Volunteer Day
• Virtually engaged 73 individuals from 24 families
• Assembled 125 disaster preparedness educations kits for seniors

Volunteer Administrators’ NETWORK
• Continued to meet and support each other

Youth Volunteer Corps
• Made Welcome Back to School cards for every student at Newman School
• Helped with a website review for the Suicide Prevention group
• Participated in Family Volunteer Day

Consulting and Coaching
• Provided support and tools for agencies to start or improve their volunteer management practices
GIVE - ADVOCATE - VOLUNTEER

United Way of Yellowstone County is proud to partner across the state to bring the Montana211.org online Resource Directory to our region as well as the ability to call 211 for help 24/7 in Yellowstone County.

Your investment helps connect those in need to available resources, agencies and programs available in Yellowstone County. We believe that more can be accomplished when everyone works together and are proud to offer and support the following programs and coalitions.

### UWYC LEAD PROGRAMS

- **CARE Academy and Discover Zone** before, after, and summer programs for K-8 students have been running for over 16 years! Hundreds of students and parents benefit every year from the quality out-of-school time provided by these programs.

- **Success Mentoring**
  - 295 students
  - 22 part-time staff
  - 9 locations
  - 2,300 hours spent keeping kids safe and academically engaged

- **Reach Out and Read** provides books to children ages 0-5 free of charge at their Well Child Checkups! Reading to young children helps with brain development, kindergarten readiness and positive parent and child interactions.

- **Best Beginnings Yellowstone County** is made up of a leadership team and work groups that strengthen early childhood systems of care to ensure that all children prenatally to kindergarten have the language, health, and social emotional building blocks necessary for healthy brain construction.

- **One of the best indicators of a success in life is graduating high school. We are proud to partner with local schools to increase attendance and ultimately graduation rates.**

### UWYC BACKED COALITIONS

- **Bright By Text**
  - 978 children registered
  - 9 counties

- **Coordinated Entry**
  - Over 20 agencies united in a common goal

- **Low Barrier Shelter**
  - 5,772 nights of shelter provided to 288 individuals

- **Diversion Fund**
  - 833,567 invested in keeping our neighbors in their homes

- **Continuum of Care** is a coalition of leaders joining forces to re-imagine our homeless response. Their goal is making homelessness brief, rare, and non-recurring in Yellowstone County.

- **Parent Connect**
  - 1,043 newborn caregivers contacted

We are proud to report that Substance Abuse Connect has officially outgrown us! Our goal in providing backbone support to coalitions is that they will be successful to the point of branching out on their own. Congratulations to everyone who has made Substance Abuse Connect such a success in providing essential services to our neighbors battling addiction and seeking recovery.

### PARTNER GRANTS

- **$288,750**
  - 148,125 meals provided
  - 128 trainings completed
  - 329 individuals received housing or utility assistance
  - 11,646 education support sessions received
  - 20,443 mentoring & advocacy sessions conducted

We are incredibly proud of our partner agencies and all they accomplish while joining us in the fight for better health, education, and financial stability for every person in Yellowstone County!
THANK YOU TO THE DONORS AND SPONSORS WHO MADE OUR 60TH BIRTHDAY BLOWOUT A HUGE SUCCESS!

More than $33,000 was raised through the generosity of our community to help our neighbors who are most in need!

GIVE - ADVOCATE - VOLUNTEER

We celebrate our Leaders in Giving for generously donating their time and personal resources to further the work of United Way of Yellowstone County. These individuals are one of our greatest resources in helping address some of the most complex issues that face our neighbors and neighborhoods. Help us in thanking them for helping to make a big impact under the Big Sky!

TOCQUEVILLE SOCIETY
$10,000 +
Kevin & Laurie Riley

BIG SKY LEADERSHIP CLUB

SUMMIT MEMBERS
$5,000 - $9,999
Richard & Ericka Brown
Stacy & Deanna Emmett
Chris & Kristie Jessup
Ardyce & Bob Kelly
Patrick & Mary Kay Kimmert
Dr. Michelle Spenny & Andy Boetticher

ALPINE MEMBERS
$2,500 - $4,999
Duane & Kristen Alggaard
Todd Anderson
Angel & Jessica Chacon
Richard & Cheri Cox
Cynthia Foster
Chuck Gainan
John & Taylor Herr
Lew Hines
Patrick & Kim Lewis
William & Margaret Murry
Bryan & Coral Ragsdale
James & Christine Scott
Dr. Ron & Karin Smith
Karla & Rick Stauffer
Stewart & Mary Jane Taylor
Dr. Charles Wittnam & Pat Payne
Daniel S. Wohlgenant

TIMBERLINE MEMBERS
$1,000 - $2,499
Jerry & Wanda Anderson
Donald & Elizabeth Arendt
Fran Arganid, MD & Jim Peak
David Armstrong
Michael P. Bailey
Dr. Bruce & Susan Barrow
James & Frankie Bennett
Greg & Sandy Berkram
Michael Bertram
Carol & Michael Burton
Douglas & Sarah Calvert
Gregory Capron
Jennifer J. Carmody
Janet Carpenter
Kevin Deckert
Joaquim DeMagalhaes
Mike & Janet Devous
Tom & Pam Dimich
Chris Klein & Katie Edwards
Tamara Epeland
Krystal & Robert Emineth
Lyle Ewert
John & Robin Felton
Bradley & Dede Fuller
Daniel & Karen Gall
Kelda & Jason Gauer
Shawn Gregory
Aidan D. Guthridge
Steve Haley
Shawn M. Hinz
Shayne & Theresa Hinz
Chris & Tracy Holness
Mark & Camilla Horn
Dr. Robert N. Hurd
Douglas Iversen
Kimberly A Jakub
Aaron & Rebecca Johnson
David & Judy Johnson
David & Kat Kelley
Karen Kennah
James Klank
Lawrence & Karen Klee
Gareld Krieg

Debra & Clyde Landrie
Gerard Leenheers
Brian & Kristy Levin
Joe Lierow
Jeff Lindenbaum & Joan Sorensen
Jacqueline Maiden
Ben & Mary Lou Marchello
Lori Kay Marosok
Kimberli Martin
Dr. Virginia K. Mohl
Sandy Morse
Marcy & Ed Mutch
Kathleen Nordahl
Dr. Claire Oakley
Joy & Shane Ott
Brock & Alicia Pearson
Darrin & Charity Pepsinski
Mark Petesch
Jill & Garth Quade
Mark & Christine Randak
Allen Rapacz
Ron Ring
Jim & Lin Roscoe
Tim & Sue Runkle
Bret & Rochelle Rutherford
Robert & Pamela Sanderson
Michael & Sara Sanderson
Nicholas & Sandra Scoccoto
Dan & Debbie Singer
Travis Smith
Kyla Steppler & Isaac Diaz
Daniel L. Stetler
Taylor Trent
Steve Torpey
Sue Tucker
Rachel B. Turrito
Lewis & Karen Vowell
Anonymous (8)

Jerry & Wanda Anderson
Donald & Elizabeth Arendt
Fran Arganid, MD & Jim Peak
David Armstrong
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David & Judy Johnson
David & Kat Kelley
Karen Kennah
James Klank
Lawrence & Karen Klee
Gareld Krieg
Thanks to the generous support of these companies, foundations, employees and organized labor, more children can succeed and more families can be financially stable.

$50,000 - $100,000
- CHS, Inc.
- ExxonMobil
- First Interstate Bank of Billings
- Phillips 66 Billings Refinery
- Scheels All Sports

$5,000 - $7,499
- Anderson ZurMuehlen & Co., P.C.
- BNSF Railway Foundation
- Jensen Foundation
- Montana Dakota Utilities Co.
- Pepsi-Cola Bottling Co.
- Sanderson Stewart
- US Bank
- United Way of Yellowstone County
- Wells Fargo, N.A.
- Yellowstone County

$1,000 - $2,499
- BMO Transportation Finance
- Brown Law Firm
- Century Link
- Dillard’s
- First Church of Christ Scientist
- Royal & Norma Johnson Charitable Foundation
- Nelnet
- O’Reilly Auto Parts
- PayneWest Insurance
- Schutz Foss Architects, P.C.
- Streeter Brothers Insurance, Inc.
- Target Stores
- TJ Maxx
- Wal-Mart Stores

$10,000 - $14,999
- Billings Clinic
- RiverStone Health
- St. Vincent Healthcare
- UPS, Montana

$7,500 - $14,999
- Billings Federal Credit Union
- Billings Public Schools
- Costco Wholesale
- Enterprise Rent-A-Car
- KLJ Engineering LLC
- NorthWestern Energy
- ONEOK, Inc.
- Underriner Motors
- Dennis & Phyllis Washington Foundation

$2,500 - $4,999
- Alternatives, Inc.
- Border States Electric
- City of Billings
- Federal Express Corp
- Pacific Source
- Nutrien Ag Solutions
- RBC Wealth Management
- The Children’s Clinic

$15,000 - $49,999
- Billings Clinic
- RiverStone Health
- St. Vincent Healthcare
- UPS, Montana

$2,500 - $4,999
- Alternatives, Inc.
- Border States Electric
- City of Billings
- Federal Express Corp
- Pacific Source
- Nutrien Ag Solutions
- RBC Wealth Management
- The Children’s Clinic

We unite people, ideas and resources to advance the common good.

**ASSETS**

<table>
<thead>
<tr>
<th>Category</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Current Assets</td>
<td>$1,023,245</td>
</tr>
<tr>
<td>Net Property &amp; Equipment</td>
<td>1,226,398</td>
</tr>
<tr>
<td>Other Assets</td>
<td>2,068,062</td>
</tr>
<tr>
<td><strong>Total Assets</strong></td>
<td><strong>$4,317,705</strong></td>
</tr>
</tbody>
</table>

**LIABILITIES & NET ASSETS**

<table>
<thead>
<tr>
<th>Category</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Liabilities</td>
<td>$1,000,868</td>
</tr>
<tr>
<td><strong>NET ASSETS</strong></td>
<td></td>
</tr>
<tr>
<td>Board Designated</td>
<td>1,019,590</td>
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<tr>
<td>Unrestricted</td>
<td>1,765,155</td>
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<tr>
<td>Permanently Restricted</td>
<td>532,092</td>
</tr>
<tr>
<td><strong>Total Net Assets</strong></td>
<td><strong>3,316,837</strong></td>
</tr>
<tr>
<td><strong>Total Liabilities &amp; Net Assets</strong></td>
<td><strong>$4,317,705</strong></td>
</tr>
</tbody>
</table>

**REVENUE**

- CARE Academy - 18%
- Investment Income - 13%
- Grants - 45%
- Business Support - 12%
- Individual Support - 12%

**EXPENSES**

- Community Impact - 84%
- Management - 10%
- Fundraising - 6%

Financial Activities for the Period Ending June 30, 2021
Our annual audit and tax form 990 are available at:
www.unitedwayyellowstone.org/financials