

UNITED WAY IN 2023

ANNUAL REPORT



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FROM OUR LEADERSHIP

To Our United Way Community,

It is my honor to present the 2023 annual report for United Way Worldwide. I stepped into leadership in 2022 during a pivotal time of reimagining for this incredible organization. I embraced the challenge with a focus on transformation and the belief that United Way could rise to modern challenges, just as it has throughout its history.

We began by evaluating our business philosophy and practices to ensure we were positioned for the future. A key milestone was bringing greater unity to our network, eliminating internal barriers between domestic and international United Ways to create a more seamless business structure. This resulted in improved communication, targeted program support, and greater operational transparency. Most importantly, we took the time to onboard new talent, integrate staff, and reimagine new ways of work.

Our transformation also focused on financial sustainability. With the post-COVID philanthropic landscape shifting, we reassessed our revenue streams, identifying untapped opportunities and reshaping our narrative to engage new donors. I'm pleased to report that FY 2023 ended favorably. Additionally, we were intentional about generating a plan to grow revenue in the upcoming fiscal year in support of the United Way network.

What has remained constant through this transformation is the enduring support of our donors, partners, and volunteers. Thanks to you, we continue to deliver critical services—connecting individuals to food, housing, job training, and disaster relief through programs like 211 and MyFreeTaxes.

As I reflect on this journey, I am reminded of President John F. Kennedy's words: "There are risks and costs to action. But they are far less than the long-range risks of comfortable inaction." It is my goal to continue leading United Way with the courage and respect this organization has earned in over 137 years of service. Together, we are building a future where every community thrives.



Angela F. Williams
President & Chief Executive Officer
United Way Worldwide

Dear Friends,

As we reflect on fiscal year 2023, I am filled with gratitude for the resilience, dedication, and innovation that have defined United Way Worldwide during this pivotal time. It has been a year of transformation and growth, as we've embraced bold changes to ensure that our mission of creating thriving, sustainable communities endure well into the future.

It is with deep appreciation that I, along with the full Board of Trustees, present this overview of fiscal year 2023. United Way Worldwide continues to be a beacon of trust and impact, thanks to our commitment to excellence, transparency, and accountability. We believe in a world where every person can thrive in a strong, resilient community, and this belief guides every decision we make as stewards of this organization.

The past year marked a transformative period for United Way. Under the leadership of Angela F. Williams, the organization has embraced bold changes to meet the evolving needs of our communities and the shifting philanthropic landscape. From post-COVID challenges and the evolution of workplace giving to the reimagining of our services, Angela has led with a clear vision of what United Way can be in the future.

The Board of Trustees has worked closely with Angela to ensure that United Way is positioned not only to address today's challenges but to drive lasting, positive change. We have prioritized strategic oversight, ensuring that our financial reporting and governance practices remain strong and transparent. Each dollar invested in our programs, technology, and people is done with the highest level of accountability, as reflected in the contents of this annual report.

Looking ahead, we recognize that the philanthropic landscape is changing, and we remain committed to adapting with it. Our responsibility as a Board is to guide United Way through this period of transformation, ensuring that we continue to be a trusted partner for donors, volunteers, and communities around the world. Together, we are building a stronger, more resilient future for all.



Yuri Fulmer
Chairman, Fulmer and Company
Chair, United Way Worldwide Board of Trustees



OUR IMPACT AND REACH

BY THE NUMBERS

Our mission is improving lives by mobilizing the power of communities around the world. Our vision is a world where every person in every community is thriving.



5.4 MILLION
donors



35,000
corporate partners



34
countries and territories



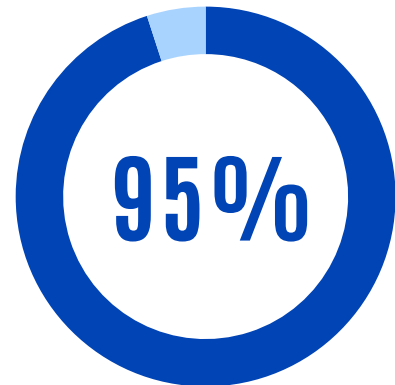
1.4 MILLION
volunteers



\$4.4 BILLION
raised in 2023



29,000
funded community partners



United Way serves 95% of all U.S. communities and tens of thousands of communities globally



48 MILLION

people served annually

BUILDING HEALTHY COMMUNITIES

In 2023, we helped people overcome barriers to good health by improving access to nutritious food and quality health education and services, including preventative care, maternal and child health, mental health support, and more.

Increasing Access to Healthcare Services

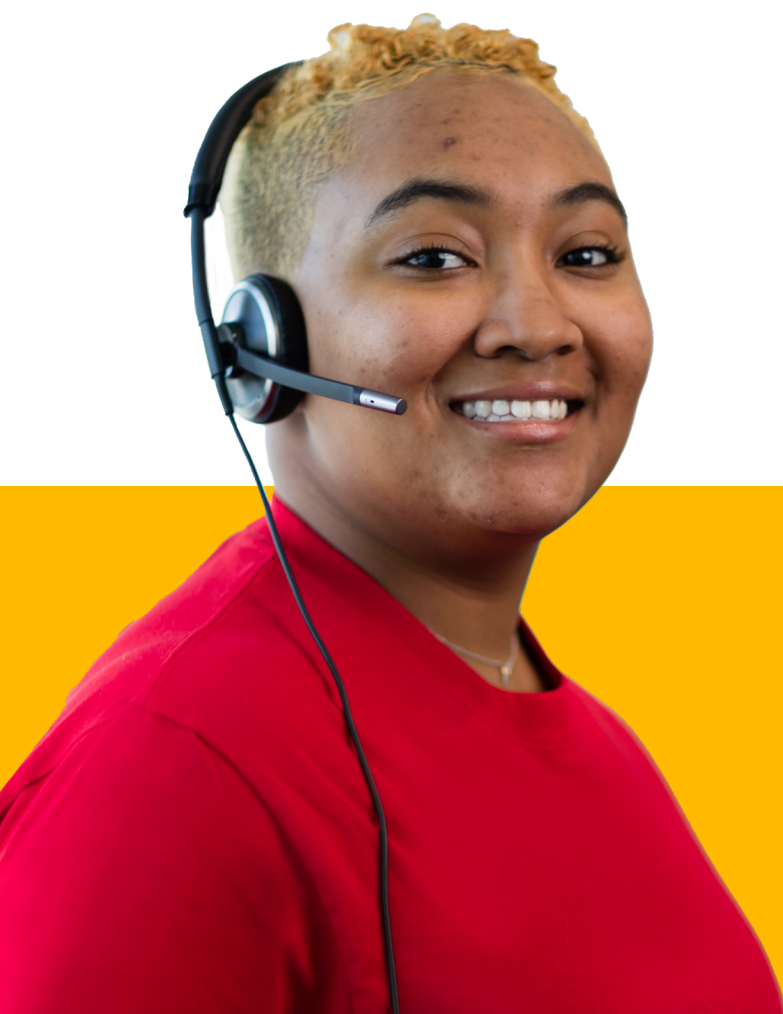
Across the U.S., our Ride United program leveraged local United Ways and our nationwide 211 call centers to connect people in need with rides to their medical appointments. Funded by Lyft, the program has provided more than 400,000 rides to people across 30 states since the program's inception.

Advocating for Nutrition and Food Security

In 2023, we advocated for public policies that improve access to affordable, healthy food, and beverages in schools and neighborhoods. Our Advocacy Forum and Capitol Hill Day, which brings together local United Ways and government officials, focused on advocating for policies related to nutrition and food security. For example, we advocated for government officials to support the Supplemental Nutrition Assistance Program (SNAP), which is vital to putting food on the table and improving food security for those who are hungry, especially children and families.

Tackling Racial Health Disparities

Together, United Way and Johnson and Johnson launched a health equity initiative to support communities of color in the U.S. In 2023, eight local United ways launched innovative solutions to address health needs in their communities, from childhood immunization to dental care and breast cancer screening. For example, in Houston, United Way of Southern Cameron County and UTHealth Houston provided mobile medical services to community members diagnosed with diabetes through their comprehensive chronic care management program Salud y Vida ("Health and Life").



400,000

rides provided by the Ride United program in 2023



Advocacy Forum and Capitol Hill Day brings together local United Ways and government officials, including advocating for policies related to nutrition and food security.



Born Learning equips parents, caregivers and communities to create early learning opportunities for young children.

INCREASING YOUTH OPPORTUNITY

In 2023, we helped children get off to a good start and empowered youth to reach their full potential. We broke down barriers to success and advanced what works, including early childhood education, literacy development, access to high-quality K-12 education, afterschool and summer enrichment programs, college and career readiness, and family engagement. Together with supporters, we're fostering a future where every young person can realize their dreams.

Raising Awareness for Youth Learning and Engagement

Our Born Learning suite is a set of tools that equip parents, caregivers and communities to create early learning opportunities for young children. Designed to support parents in their critical role as a child's first teacher, Born Learning is widely used by local United Ways, preparing millions of young people for future success. In 2023, United Way Worldwide partnered with local United Ways to adapt resources and implementation for their local community contexts, including through our volunteer literacy kits, family literacy guides, and the Born Learning Academy - a series of six parent workshops focused on the Born Learning foundation of everyday learning.

Advancing Gender Equity in STEM

In partnership with Kyndryl, United Way Worldwide supported the Aprendamos STEM (Let's Learn STEM) program among school children in eight Latin American countries. The program positively impacted more than 2,800 students and teachers. These hands-on learning projects empower students, particularly girls and minority groups, by breaking down barriers and encouraging them to pursue careers in traditionally underrepresented fields. For example, in Argentina, student teams were paired with Kyndryl employee volunteer mentors who guided them through solving problems by applying creativity, design skills, and critical thinking skills.

Fostering College and Career Readiness

Through our Young Men United program, local United Ways are working to provide young men of color with academic and life skill support to graduate college and enter the workforce. Scaled by United Way Worldwide based on best practices piloted locally, the program supports cohorts of participants in deepening their skills for success. For example, in Wilmington, the United Way of Delaware's first Young Men United class will graduate in 2024. By addressing systemic barriers and broadening career perspectives, the program empowers students to achieve their full potential academically and personally.

Together with supporters, we're fostering a future where every young person can realize their dreams.

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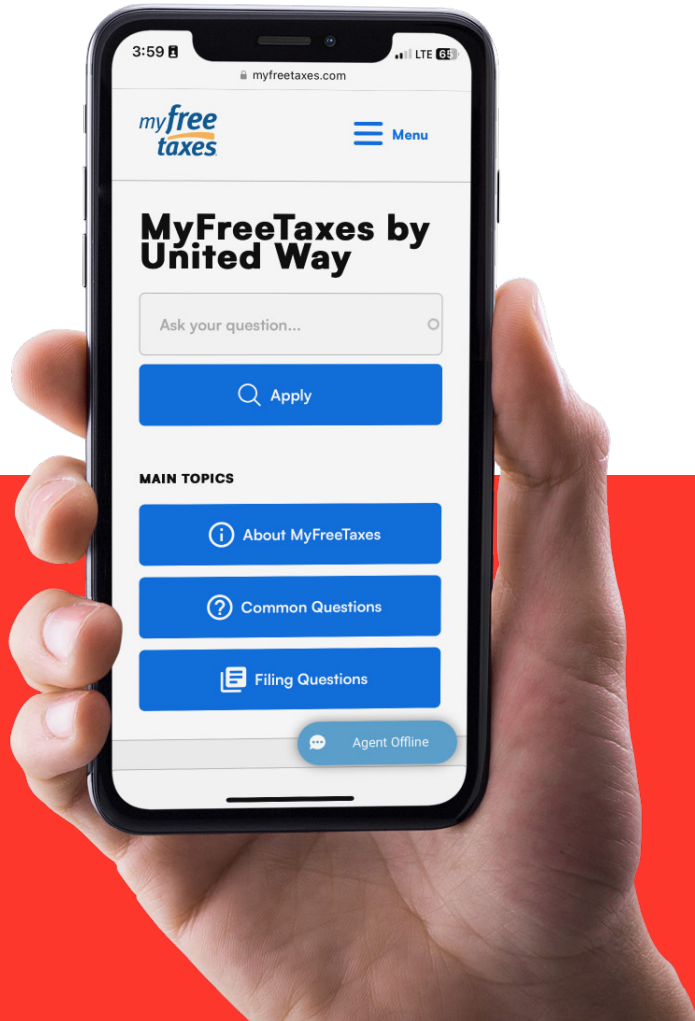


FOSTERING FINANCIAL SECURITY

In 2023, we worked to create a stronger financial future for every generation. That included helping hard working families make ends meet while connecting them with education, financial tools, and job training to enable creation of a better, more sustainable future.

Providing Financial Education and Coaching

Every day, our MySmartMoney resources help people navigate financial challenges. We also work with financial institutions and community partners to make financial education, coaching, and related services more accessible to people who need them. In 2023, more than 475,000 people accessed these digital resources to get the help they needed.



Saving People Time and Money on Tax Preparation and Filing

To help increase access to free, easy tax filing services for those in need, United Way proudly partners with the United States Internal Revenue Service (IRS) and its Volunteer Income Tax Assistance (VITA) program on our MyFreeTaxes program. More than 300 local United Ways participated in MyFreeTaxes, providing more than 48,000 people with free, qualified tax prep in 2023.

Fighting Exploitation and Human Trafficking

At United Way Worldwide, we bring anti-trafficking efforts to scale by energizing, coordinating, and mobilizing the United Way network. Whether it's spearheading innovative community-based programs, leading global awareness campaigns, or building career pathways for survivors, our aim is to build a united front in the fight against human trafficking. In 2023, we equipped local United Ways around the world with best practice training, coaching, and subject matter expertise, enabling them to implement localized community-based programs to detect, stop, and prevent human trafficking and support survivors. For example, United Way South Africa taught over 1,000 teenagers about their rights and the risks of human trafficking, while United Way of Greater Atlanta educated more than 300 direct service providers on human trafficking myths and misconceptions.

48,000

individuals qualified for tax prep through the MyFreeTaxes program in 2023

BUILDING COMMUNITY RESILIENCE

In 2023, we addressed urgent needs and worked to build resilient communities. Through initiatives in crisis response, environmental stewardship, and disaster preparedness, we are strengthening the foundations of communities for a more sustainable and secure future for all.

Providing Disaster Relief and Recovery

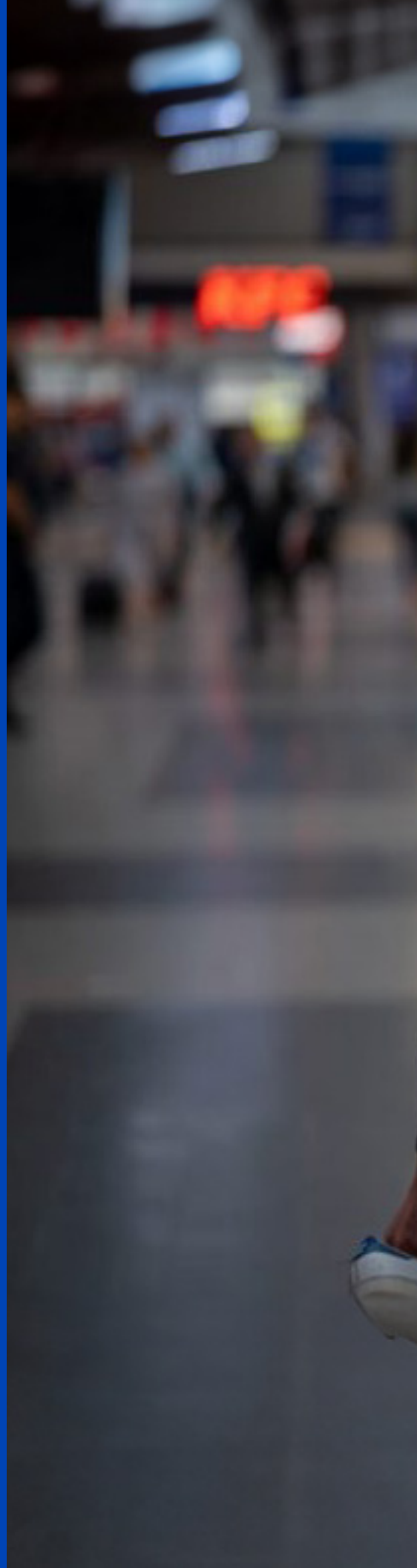
From Hurricane Idalia to the Maui wildfire, United Way was on the ground to help people who found themselves without homes, clean water, grocery stores, pharmacies, schools, or vital community services. And we were there long after the first responders were gone. For example, Maui United Way galvanized resources, coordinated volunteers, and supported their neighbors to meet not only their short-term needs but to help ensure the community's long-term resilience. United Way Worldwide supported Maui United Way with operational needs, tapping our deep partnerships with the Federal Emergency Management Agency (FEMA) and National Voluntary Organizations Active in Disaster (NVOAD).

Connecting Millions of People to Help

United Way is the largest investor and supporter of 211, a 3-digit dialing code that connects to a free, confidential service for information and referrals to a wide range of social services programs and resources. In 2023, caring 211 specialists responded to, on average, 42,000 requests for help per day – connecting people to critical resources like food, childcare, housing, health care, transportation, and job support. This included 5.3 million people looking for housing assistance, 2.8 million people in need of utility assistance, 2.4 million calls about food and meals, and 1.1 million referrals for mental health assistance. In 2023, United Way's federal advocacy efforts included increasing awareness and support for the 211 Network through the bipartisan introduction of the Human Services Emergency Logistic Program (HELP) Act in the House and Senate that would connect vulnerable families and individuals to the local resources they need, ensuring all communities have an equal opportunity to thrive.

Supporting Ukrainian Refugees

Thanks to our ardent supporters, United Way Worldwide provided continued support to Ukrainian refugees forced to leave their homeland following the Russian invasion. Partnering with organizations in Romania, Hungary, Poland, Germany, Spain, and the Netherlands, we provided essential aid to more than 210,000 people—especially women and children forced to flee the conflict. In 2023, we provided immediate support at the borders to 21,000 people and helped 35,000 receive long-term support, like job assistance, training and education.



United Way provided essential aid to more than 210,000 people—especially women and children—forced to flee the conflict in Ukraine.





OUR PARTNERS AND SUPPORTERS

Every donation to United Way Worldwide is an investment in a world where every person in every community is thriving. We are grateful for every gift that helped to power our mission in 2023. In this report, we would like to provide special recognition to a selection of donors and partners who make United Way's work possible.

SPOTLIGHTS

GENEROUS PLANNED GIFT DONORS

Supporting Women and Children in Need

Durean Volk was known for her love of travel, passion for the Spanish language, and advocacy for the well-being and empowerment of women and children. When she made her estate plans, she carefully selected nonprofit organizations that championed her values, naming United Way Worldwide as a beneficiary of her IRA. Her thoughtfulness and generosity will contribute to stronger support systems for more women and children for years to come.

A Legacy of Leadership

As the former President of Pfizer Global Manufacturing, John Webster Mitchell was exposed to United Way through the thousands of dedicated Pfizer employees who contribute to the company's workplace campaign. His colleagues knew him for his integrity, work ethic and fairness. His bequest to United Way Worldwide's mission builds on his career accomplishments leading a global healthcare brand by ensuring that well-being is within reach for every community.

A Generous, Creative Approach to Ongoing Impact

Throughout his life, Professor Richard Oliver was known both as one of the world's foremost experts on consumer psychology and an avid Harley-Davidson motorcycle aficionado. When he passed, he added another title to his legacy: philanthropist. Annual workplace campaigns were a mainstay at three of the five universities where he taught. His generous bequest immediately after his passing and then his continuing gift of the royalty income from his publications and recorded lectures continues to generate positive impact for people and communities across the globe.





In 2023, Cummins employees built more than 2,000 bicycles for youth in their communities.



SPOTLIGHTS

THE POWER OF PARTNERSHIPS

Next-Generation Leaders Initiative

Leveraging a multi-year investment from the W.K. Kellogg Foundation, United Way Worldwide partnered with Institute for the Future to develop the Next-Generation Leaders Initiative for early career leaders across our network. This professional development experience is designed to grow their leadership skills so that they are even better positioned to serve their communities around the world.

A Commitment to Equity and Impact

With a \$300,000 general support grant from the Robert Wood Johnson Foundation, United Way Worldwide continued to develop tools and resources to support the implementation of our Equity Framework. Our newest tool, the Equity Impact Agendas Playbook, provides resources to create equitable impact agendas addressing gaps and disparities faced by historically disadvantaged and/or marginalized communities.

Tax Preparation Assistance in the U.S.

United Way Worldwide received a grant from the Internal Revenue Service (IRS) to support the MyFreeTaxes program. MyFreeTaxes is a bilingual, free online tax filing program designed to make tax preparation assistance more accessible. In 2023, the program served 48,000 people and United Way provided live support via 211 helplines in more than 150 languages to help all U.S. taxpayers access the support they need.

Employee Volunteers Creating Local Impact

With the support of more than 35 local United Ways across North America, employee volunteers from Cummins are working to improve the communities where they live and work. From planting trees to building Back-to-School Kids or sharing literacy materials, their volunteer work brings people together. In 2023, Cummins employees built more than 2,000 bicycles for youth in their communities. In addition to providing an opportunity for healthy activity and recreation, a bike opens up a world of exploration, adventure and newfound freedom for a child.

GLOBAL CORPORATE LEADERSHIP COMPANIES

The United Way Global Corporate Leadership program recognizes those companies that contribute significantly to the mission of United Way and that are national or global in scope. The employees of these companies contribute through employee campaigns and many of the companies invest in the impact of United Way by supporting important programs and initiatives. United Way understands the power of partnerships to make communities stronger and appreciates the commitment of these companies to the mission of United Way.

3M	Dow	JCPenney	Synchrony Financial
Abbott	Duke Energy	Johnson & Johnson	T.D. Williamson, Inc. (TDW)
AbbVie	Eaton	Kellanova	Target
Accenture	Ecolab	Kendall-Jackson	Texas Instruments (TI)
American Express	Elevance Health	Keurig Dr Pepper	Toro
AT&T	Eli Lilly	Kimberly-Clark	Toyota Motor North America
Auto Club Enterprises (AAA)	Enterprise	Land O'Lakes	Travelers
Avery Dennison	Exxon Mobil	Lumen	Truist
Bank of America	EY	Lyft	U.S. Bancorp
Best Buy	FedEx	Medtronic	United Services Automobile Association (USAA)
BMO	Fifth Third	Microsoft	UPS
C&S Wholesale Grocers	Fluor	Mosaic	Valero
Cargill	Ford	Nationwide	Walmart
Caterpillar	GE	Perdue Farms	Wells Fargo
Chevron	GEICO	Pfizer	WEX
Citi	General Mills	Pitney Bowes	Whirlpool
Comcast	General Motors	Principal Financial	Williams
Costco Wholesale	Genpact	Procter & Gamble (P&G)	Xcel Energy
Cummins	Hershey	Publix Super Markets, Inc.	Xerox
Deere	IBM	PwC	
Deloitte	Illinois Tool Works, Inc. (ITW)	Shell	
Delta Air Lines	International Paper	Stellantis	





UNITED WAY WORLDWIDE BOARD OF TRUSTEES*

Thank you to our Board of Trustees for providing their time, expertise, deep experience, and commitment to the mission of United Way. The United Way Worldwide Board of Trustees has fiduciary oversight of United Way Worldwide, and is responsible for overseeing the business affairs of the organization.

Marc Bitzer

Chair of the Board

Mariame McIntosh Robinson

Vice-Chair*

Yuri Fulmer

Chair-Elect**

Michael K. Hayde

Treasurer of the Board

Mark S. Howard

Secretary of the Board

Anthony Early*

Bill O'Dowd**

Brian Hulseman-Abrams

Cristina Gutierrez de Piñeres**

Darrienne Driver Hudson**

David Preschlack

David Shaffer

Deanna Strable

Elaine Chao

Francesco Vanni d'Archirafi

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Orv Kimbrough

Rosie Allen-Herring**

Steve Ortiz**

Suneeth Katarki

Swati Mylavaram

Tom McInerney**

Yuri Fulmer

*Through June 2023

**Starting July 2023

UNITED WAY WORLDWIDE LEADERSHIP TEAM*

Angela F. Williams

President and CEO

Alice Archabal

EVP, Chief Development Officer

Bruce W. Friedman, CPA

EVP, Chief Financial Officer and

Assistant Treasurer

Byron V. Garrett

EVP, Government Partnerships

Chris Jackson

EVP, Chief People and Culture Officer

Dr. Nicole M. Cooper

EVP, Chief Strategy and Innovation Officer

John Farden

EVP, Global Network Advancement

and Operations

LaDawn Naegle

EVP, Chief of Staff and Administration

Lawana Jones

SVP, Chief Technology Officer

Odessa P. Jackson, Esq.

EVP, General Counsel, Chief Ethics and

Compliance Officer and Assistant Secretary

Omoiyi O. Kinney

EVP, Chief Marketing Officer

*As of December 2023

FINANCIAL SUMMARY

In 2023, United Way raised \$4.4 billion for long-term community solutions around the world. Below is a summary of financial information for United Way Worldwide, the leadership and support organization for the global network.

UNITED WAY WORLDWIDE 2023 FINANCIAL INFORMATION

Revenues and Expenses for the year ending December 31, 2023 (Dollars in Millions):

United Way Worldwide Revenues:		\$53.4
Membership dues and services	\$30.3	
Donor Contributions		
Contributions without donor designation or restriction	12.1	
Contributions with donor designation or restriction	9.0	
	<u>\$21.1</u>	
Total Donor Contributions		\$21.1
Other Revenues		\$2.0
United Way Expenses:		\$66.5
Programmatic Expenses		
Global Advancement	\$33.4	
Donor Advised Giving	6.3	
Brand and Strategy Marketing	8.3	
Digital Services	2.6	
Other Program Services	5.2	
	<u>\$55.8</u>	
Total Program Service Expenses		\$55.8
Support Services		
General and Administrative	\$8.8	
Fundraising	1.9	
	<u>\$10.7</u>	
Total Support Services Expenses		\$10.7
Non-operating income		\$0.6
Total Change in Net Assets for the year ending December 31, 2023		\$(12.5)
United Way Worldwide Net Assets at December 31, 2023		\$49.2

GET INVOLVED

Get Involved. Give Back. Take Action.

unitedway.org

Connect on Social

 facebook.com/UnitedWay

 [@unitedway](https://instagram.com/unitedway)

 linkedin.com/company/united-way-worldwide

