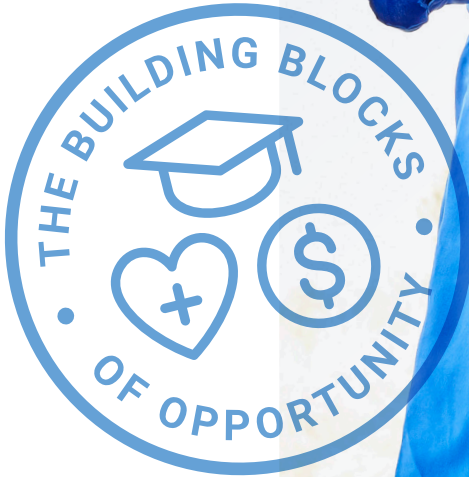


# IMPACT REPORT 2022-23



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## A message from our CEO: Together, we're creating generational change

As I reflect on the last year, I am inspired by and grateful for the corporate and nonprofit partners, donors, volunteers and advocates who comprise the Live United movement. United, this unstoppable force for change improved access to education, income and health for 1.6 million North Texans.

This work is critically important. Even in a prosperous, growing region like North Texas, opportunity is not equal for everyone. Over the last year, our neighbors grappled with challenges old and new, including a difficult labor market, stubbornly high inflation and a growing housing crisis. Meanwhile, local communities of color experienced the sustained and systemic inequities that have persisted for generations, preventing far too many people from thriving.

In the face of these challenges, United Way continued to adapt and innovate, expanding existing initiatives and launching new programs to create transformational change. Together, with our dedicated corporate, philanthropic and community partners, we drove real, quantitative progress toward our Aspire United 2030 community goals and delivered on our commitment to advance racial equity.

We do this work to create lifelong change that transforms the entire trajectory of an individual, a family and a community. We focus on education, income and health because they are interconnected and interdependent: Children who enter school ready to learn are more likely to become strong readers, which in turn makes them more likely to succeed after high school. College graduates tend to earn more, which enables them to save for the future, and financially stable adults can cover the costs of healthcare and support their children's success in school. This is the virtuous cycle that the Live United movement makes possible.

The extraordinary generosity of our donors is what fuels this lasting impact. Despite overall giving levels falling in cities across the U.S., philanthropy in North Texas remains strong. In our region, the Texas miracle is not just economic; it's philanthropic. This is especially true of corporate giving in our region, as reinforced in a recent article

in *The Chronicle of Philanthropy*, which highlighted United Way of Metropolitan Dallas as an organization that creates innovative programs and partnerships and builds relationships across the corporate landscape and all giving channels.

This year, we experienced generosity in all shapes and sizes, as the Live United movement came together to fuel more impact than ever before. Thousands of individual change-seekers from across North Texas invested in our cause, joining a community-wide movement that is committed to making our region more equitable for all. We were honored to receive a historic \$15 million investment from The Perot Foundation—an unprecedented vote of confidence in our ability to drive measurable progress toward our goals. Meanwhile, \$1 million donations each from Trinity Industries, Comerica Bank and Frito-Lay/PepsiCo marked an extraordinary start to our Centennial fundraising efforts.

Our success over the past year was made possible by the inspiring leadership of our board chairs, **Steven Williams**, CEO, PepsiCo Foods North America; and **Terri West**, chair, Texas Instruments Foundation; as well as our annual campaign chair, **Jean Savage**, CEO of Trinity Industries.

As we continue to drive progress toward our Aspire United 2030 goals, we hope this Impact Report inspires each of you to pledge your support to the Live United movement and work together to improve access to education, income and health. Thank you for creating access and opportunity for all North Texans to thrive.

With gratitude,

**Jennifer Sampson**  
McDermott-Templeton President and CEO



# Who We Are

We are a social change organization that unites the community to create access and opportunity for all North Texans to thrive.

Together with dedicated supporters like you, we improve access to education, income and health—the building blocks of opportunity—by driving progress toward our 10-year goals for North Texas, known as Aspire United 2030. We bring together individual change-seekers, corporations, foundations, nonprofits, school districts and more to achieve measurable outcomes for our community, working from a racial equity lens so we can create transformational change that lasts for generations.

Our vision is a North Texas where all students graduate prepared for success at college or on the job, all local families achieve financial stability and all our neighbors access the health resources needed to live longer, healthier lives.

Children who enter school ready to learn are more likely to read proficiently by 3rd grade.

Students who read proficiently by 3rd grade are 5x more likely to graduate from high school ready for college or career.

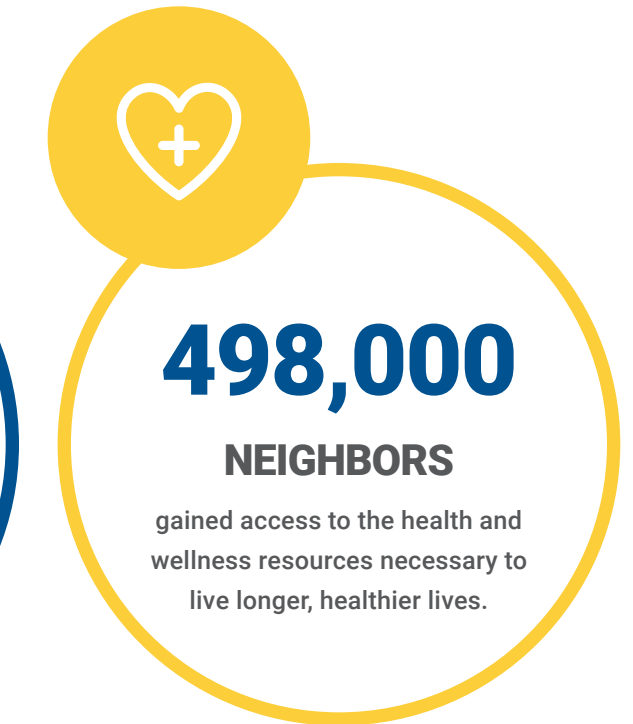
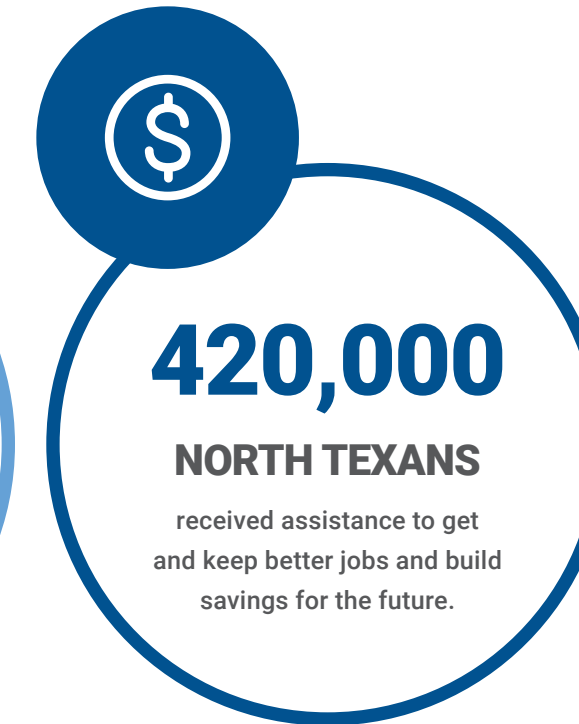
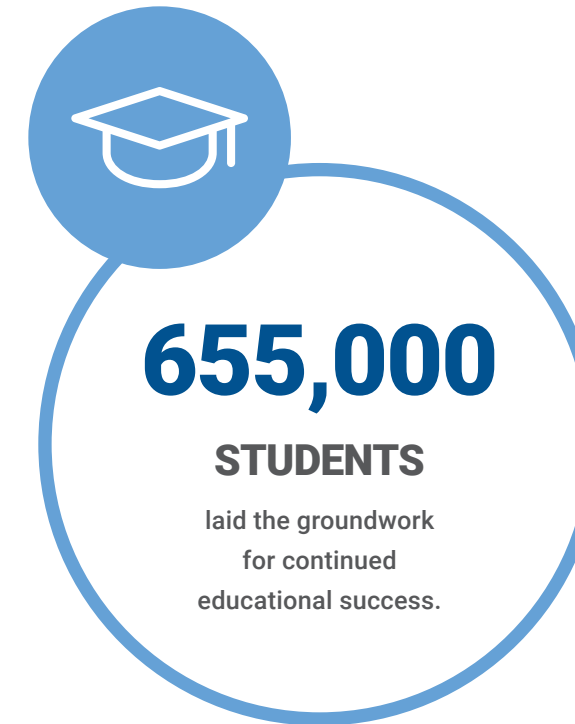


Financially stable adults can cover the costs of healthcare, helping them lead longer, healthier lives.

College graduates earn up to \$36,000 more a year, enabling them to save for the future.

# United, We're Changing Lives

In the last year, supporters like you changed the lives of 1.6 million North Texans—more than 20% of our region's population.



# Our North Star: Aspire United 2030 Goals

Each year, we closely track and assess our progress toward our mission to improve access to education, income and health. To ensure we are driving measurable, meaningful change, we collaborated with a broad spectrum of community partners to develop the Aspire United 2030 goals: our North Star for creating transformational change and advancing racial equity in education, income and health across North Texas through the year 2030.



INCREASE BY

**50%**

the number of students reading on grade level by third grade.



INCREASE BY

**20%**

the number of young adults who earn a living wage, adding more than \$800 million per year to the local economy.



INCREASE TO

**96%**

the number of North Texans with access to affordable healthcare insurance.

## Community Impact Partners Drive Change

We partner with a variety of organizations that are aligned with our Aspire United 2030 goals. Our partners range from long-standing, proven impact solutions to grassroots entrepreneurs and ventures, and they have one thing in common: They engage directly with the communities in which greater investment and equity will have the most impact. Investing in these partners and collaborative initiatives is just one way we drive measurable progress across North Texas.

# Progress Toward Our Goals

We track progress toward our Aspire United 2030 community goals through our partnership with the Parkland Center for Clinical Innovation (PCCI). We carefully selected PCCI as our independent external auditor because they are nationally recognized for their expertise in defining and measuring near-, mid- and long-term success and communicating impact. Setting and closely tracking quantifiable 10-year goals and leveraging a third-party evaluator are key differentiators in our unique approach to community impact work.

Here is the most recent data on our key impact measures in education, income and health in North Texas.\*



### Education

Third-grade reading proficiency decreased an average of 8% (from 55.59% to 47.43%) when compared to the prior baseline year, based on 2021 Texas Education Association data. We can attribute this to the ripple effects of the COVID-19 pandemic and its profound impact on early childhood learning.

>> This is trending in the wrong direction, making progress toward our Aspire United 2030 goals even more critical.

### Income

All counties in our service area saw a small improvement (~2%) in the percentage of adults earning a living wage, as reflected by 2019 American Community Survey (ACS) data. Rockwall County experienced the greatest increase, at +3.2%.

### Health

There was essentially no change in the percentage of individuals with health insurance coverage, as reflected by the 2019 ACS. However, Texas is seeing improved rates of insured individuals overall, with nearly 570,000 new signups for affordable healthcare plans in 2023—the largest jump in the nation.

\* Please note: These are the newest datasets available and do not necessarily reflect our most recent progress in these areas.





## More Student Success

Access to education has a lifelong impact on children, encouraging early literacy and kindergarten readiness, enabling them to excel in school and even supporting their success in college or a career. We lead and invest in programs that ensure North Texas students have what they need to succeed.

### Once Upon A Month™

This popular early literacy program delivers free age-appropriate children’s books and parental reading guides to families every month, stimulating curiosity, language development and learning skills—all of which set kids up for success in kindergarten. Thanks to support from The Boone Family Foundation, we’re moving closer to our goal of distributing 1 million books by 2027.



received free monthly books

distributed to North Texas families

reported reading more to their children



“I did not have books in my home growing up, so now that my child is a part of the Once Upon A Month program and receives books monthly, it makes me smile and heals my inner child while I’m reading to her.”

– Maria, whose daughter receives free books through Once Upon A Month

#### PROGRAM PARTNER



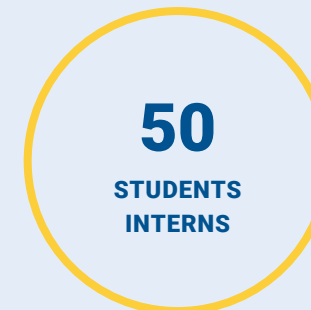
### Heal Play Learn

Made possible by a grant from Texas Instruments Foundation, this partnership with Educate Texas delivers hands-on learning opportunities to students in Lancaster, DeSoto and Cedar Hill school districts. The engaging experiences encourage social and emotional wellness, physical activity, creativity, collaboration and critical thinking skills.



participated in hands-on learning activities

provided to students



facilitated programming

#### PROGRAM PARTNERS



### Early Childhood Development

Parent education initiatives like Healthy Outcomes through Prevention & Early Support (HOPES) and Texas Home Visiting Program provide families with hands-on instruction, community resources and skills that empower parents, encourage healthy child development and prevent child abuse.



participated in a home visiting program

attended early childhood development community events

received supplemental services



“My son Xavier was nonverbal and had developmental delays. The parent educator was able to modify her lesson plans and help me implement strategies at home to support his continued growth and development. This year, he was able to enroll in a public school, and he has made significant progress academically and socially. He is now thriving in his new environment.”

– Mayra, home visiting client



## Greater Financial Stability

Access to a good-paying job and financial stability has a ripple effect, enabling a family to support their children's success in school, save for the future and access quality healthcare. We lead and invest in programs that make better jobs, less debt and higher savings a reality for more North Texans.

### Pathways to Work

This workforce development program, facilitated in partnership with 36 community organizations, gives hardworking North Texans the training necessary to secure jobs in IT, healthcare and more.



served by Pathways to Work



earned by participants



secured for graduates



“What I learned from training was how to be a better ‘me’. I learned how to upgrade myself, and I developed and overcame several obstacles. I’m looking forward to putting all the skills I learned to work.”

– *Michell Ray, Pathways to Work client*

#### Program Partners



### Dollars for College

This partnership with Communities Foundation of Texas seeds college savings accounts for low-income students, making them significantly more likely to attend and graduate college.



opened for low-income students, for a total of 992



for a total of \$343,737



“I didn’t get to attend college myself, and I wanted my son to have that opportunity. The Dollars for College savings program is ensuring my son will have the funds to do what I wasn’t able to do.”

– *Ms. Richmond, parent of a student at Rolling Hills Elementary*

#### Program Partners



### Housing Stability

We work to prevent homelessness in North Texas by creating programs and forming strategic partnerships that encourage housing stability. In 2022-2023, we advocated for affordable housing and continued our leadership of the Dallas Rental Assistance Collaborative, which provides rental and utility assistance to keep families in their homes during challenging economic times.

→ **\$3.8 MILLION IN RENT AND UTILITY ASSISTANCE** provided to families

→ **594 HOUSEHOLDS RECEIVED SUPPORT** through the Dallas Rental Assistance Collaborative



“Receiving rental assistance was a huge weight that was lifted from my shoulders. I was incredibly happy. If I had not received assistance, I would have been homeless with a newborn baby.”

– *Jasmine, Dallas Rental Assistance Collaborative client*

#### Program Partner





## Improved Health for All

Good health allows individuals, families and entire communities to thrive, creating a foundation that impacts everything from how well a child can learn to how much an adult will earn. We lead and invest in programs that improve health access for all North Texans.

### Doorways to Health

This community partnership seeks to improve the maternal health outcomes of Black women in Dallas. Doorways to Health offers a variety of resources and programming, including home visiting and holistic maternal healthcare services, to ensure new and expecting mothers have the support necessary to thrive. In 2023, the partnership also hosted informative community events to highlight the importance of Black maternal healthcare during Black Maternal Health Week.



served by Doorways to Health partners



attended informational sessions about Black maternal healthcare

“

“I felt confident in a place where I could just be a pregnant person of color. They were very informative and always checked on me. Being around women who look like you, who have done the things you’ve done...[it] boosted my confidence that I could actually be a mom. It’s very communal and you feel very supported.”

– Lasean, Doorways to Health client

### North Texas Summer & Supper Council

This partnership with North Texas Hunger Initiative works to improve and amplify summer meals programming to provide regular, nutritious meals to children who qualify for federally funded nutrition programs.



in Dallas and Collin counties, summer 2022



received regular, nutritious meals, summer 2022



### Healthcare Navigators

This collaborative program provides a network of certified Healthcare Navigators for the North Texas community, delivering support for individuals and families looking to sign up for health insurance through the Marketplace, Medicaid or CHIP. Navigators work directly with clients to help them compare health plans, understand benefits and apply for subsidies to lower their monthly premiums.



fielded by Healthcare Navigators



assisted as they signed up for CHIP/Medicaid



received support to enroll in a qualified health plan

“

“My experience signing up was not hard at all. To me it was like a load lifted off, knowing that I was covered in case anything happens or just for my routine visits.”

– Diana R., Healthcare Navigators client

#### Program Partner



# Creating a Targeted Impact

Our targeted impact initiatives are a powerful way to drive systemic change in the areas of North Texas that will benefit the most. Together with our corporate and foundation partners, we develop programs that are customized to the challenges and opportunities of the communities we serve.

Leading businesses across North Texas are committed to investing directly in the communities in which their employees live and work in order to improve access to education, income and health and promote greater equity. Dozens of corporations including Texas Instruments, PepsiCo/Frito-Lay and AT&T have selected United Way of Metropolitan Dallas as a trusted corporate social responsibility (CSR) partner with the deep understanding, close connections and innovative strategy necessary to create meaningful, measurable impact.

**Digital Bridges and Southern Dallas Thrives are just two examples of this collaborative approach.**



## Digital Bridges

This program distributes digital technology to students and young adults across Southern Dallas to enable them to access education, further their learning and stay connected in the classroom and beyond. Through our partnership with Compudopt, the laptops come with two years of warranty and bilingual technical assistance.



distributed in 2022



served in 2022

“

“The laptops we received help complete missing assignments and get caught up... I’ve seen a drastic increase in their grades. The biggest victory is that my oldest daughter will graduate on time—she went from not caring about graduating to now wanting to attend community college!”

– Deambra Green, whose five daughters received digital technology through Digital Bridges

## Investors



**THE EUGENE  
MCDERMOTT  
FOUNDATION**

**RICHARD AND  
MARY TEMPLETON  
FOUNDATION**

“

“By working with the United Way of Metropolitan Dallas, we can scale our impact and bring the tools all individuals and families need to succeed and thrive in today’s world, be it finding a job, completing an education or managing personal finances. We know we cannot narrow the digital divide alone.”



– Charlene Lake, Senior Vice President, Corporate Social Responsibility and Chief Sustainability Officer, AT&T and United Way Board Member



# Southern Dallas Thrives

Created in partnership with PepsiCo Foundation and Frito-Lay North America, this set of programs invests in the communities of Southern Dallas and expands access to early education, nutrition, college and career readiness, and workforce development.

## Campus-based Community Hubs

Resource rooms at Southern Dallas high schools provide a central location for more than 4,500 students, plus parents, teachers and other community members, to access technology, books, health resources and more.



## Childcare Assistance

Southern Dallas Thrives invests in childcare centers to improve the quality of early education and ensure kids thrive from a young age.



## Food Access

In partnership with Goodr, we deploy creative solutions to support families dealing with food insecurity.



“

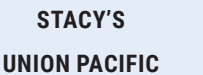
“We’re collaborating, we’re changing the way we look at education and we’re building that bridge between teachers and parents.”

– Johnna Weaver, principal at Lincoln High School

## Southern Dallas Thrives Investors



## Supporting Investors



# Voices of the Live United Movement



United Way leads a community-wide movement to improve access to education, income and health. We bring together individual change-seekers, corporate partners and local organizations from across North Texas to drive meaningful change through volunteer and advocacy opportunities, employee engagement, Giving Society membership and more.



"I believe in the power of giving back, and I don't think there's another organization finer than United Way to partner with to do that. I'll do my best to be the best chairperson for this organization—and we're going to make a big impact in this community."

– *Steven Williams, CEO, PepsiCo Foods North America, 2022-2024 United Way Board Chair, Co-Chair, United Way Centennial CEO Advisory Council, 2024-2025 United Way Campaign Chair*



"I'm continually inspired to see the level of dedication that so many North Texans have for United Way's mission. Together, we're making this community a stronger and more equitable place for everyone to call home."

– *Terri West, Chair of the Texas Instruments Foundation, United Way Foundation Board Chair*



"The Live United movement is energized, unified and committed to making real change in the lives of all North Texans. I always heard the Dallas area was very philanthropic, but I have to say I've been impressed by the level of giving by organizations and individuals. We hope that continues and it inspired others to give."

– *Jean Savage, CEO and President, Trinity Industries, 2022-2023 United Way Campaign Chair, Co-Chair, United Way Centennial CEO Advisory Council*



"Giving back is important to me because there are many underserved communities that lack access to opportunities and resources. United Way of Metropolitan Dallas has helped shed light on those organizations that are doing great work and connect me to them so that I can be a resource."

– *Nick Rodriguez, Vice President, Private Banking, Amegy Bank, United Way Emerging Leader*



"There are some really generous people in Dallas. When we came to town and saw all the amazing things that they've done, we wanted to do our part to make the city a better place. It was really easy to get behind United Way because they were where the action was and they were making a difference in our city."

– *Tom and Karen Falk, 2019-2020 United Way Campaign Chairs, 2023 J. Erik Jonsson Award Recipients*



"No one has ever made it through life without the help of someone else. So I pay it forward by volunteering my time to the community that helped me in the past. United Way always makes it so easy to give back."

– *Te'rica Williams, TXU Energy, Frequent United Way Volunteer*



**HAYNES BOONE**

"I was already active with United Way prior to joining the March Tocqueville Fellows program, but the most interesting part about being a fellow is to truly be able to understand the breadth and depth of United Way's involvement in the community. It inspires me to be get more involved, and I have enjoyed getting to know future philanthropic leaders and taking advantage of volunteer opportunities, leadership development and mentorship."

– *Lindsey Hughes, Counsel, Haynes Boone, United Way March Tocqueville Fellow, Co-Chair, United Way Advocacy Committee*



"As United Way approaches its Centennial year, there is so much excitement building for the future of North Texas—from individuals getting involved to organizations making historic investments in this work. It's incredible to see all of us coming together to achieve our goals, and to watch the next generation get engaged. Let's keep this momentum going as we enter our next century of impact."

– *Mackenzie Kleinert, Co-Chair, United Way 100 Host Committee*



"The only thing that matters is making a positive impact on the community of North Texas. My goal is to make a meaningful contribution through my position. It is endlessly gratifying when an organization does what they came to the United Way Social Innovation Lab to do: accelerate their progress by years by going through our programs."

– *Shawn Leamon, Chief Strategist, LaGrande Marketing, Co-Chair, United Way Social Innovation Accelerator Committee*

# Social Innovation Fuels Lasting Change

Social innovation is part of our DNA, helping to guide everything we do to improve access to education, income and health. Over the past 10 years, we have launched a suite of social innovation programs, known as the Social Innovation Lab, that support and amplify the work of social entrepreneurs who are creating measurable impact in North Texas.



## Social Innovation Incubator

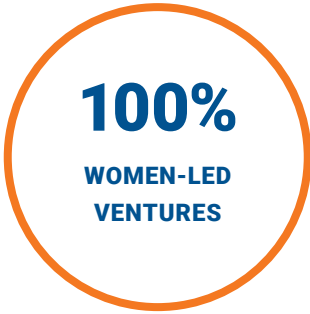
This organizational and leadership development program is designed for early-stage entrepreneurs who have experienced systemic racial and gender inequities. Through our 14-week program, we build up innovative startups by providing mentorship and guidance that empowers them to create a validated business plan and begin building their ventures. The initiative also establishes a stronger, more diverse pipeline of ventures that are ready for the Social Innovation Accelerator.



completed the program



provided to participants



during our 2022-2023 cohorts



identified as people of color

“

I originally started in the Social Innovation Incubator, and the mentorship that I got from that was great. So, when I found out there was an Accelerator program, I realized: Not only can I get more mentorship, but this is going to be something that can catapult our agency from a small nonprofit, solo-type organization to something that can grow and become scalable.”

– Dania Carter, Founder and CEO, Heart of Courage, 2022 Incubator Cohort, 2023 Accelerator Cohort

## Social Innovation Alumni Program

This new initiative, sponsored by Comerica, continues the investment of human, social and financial capital in Social Innovation Lab participants. The program provides professional development, networking and cross-collaboration opportunities to Incubator and Accelerator alumni so they can continue to build capacity, scale their organizations and expand their impact in education, income and health.

## Social Innovation Incubator Investors



UNITED WAY WOMEN OF TOCQUEVILLE FUND FOR WOMEN AND CHILDREN



THE EUGENE MCDERMOTT FOUNDATION



Jacobs

## Social Innovation Accelerator in Collaboration with Accenture

The Accelerator is a rigorous, nine-month-long program designed to test the assumptions of our fellows, shape their goals and empower them to complete key milestones. The program provides social entrepreneurs with critical resources—including funding, professional mentorship and powerful community connections—to scale their ventures and grow their impact. The program culminates at The Pitch, where finalists compete live on stage for additional seed funding.



“For the past six years, Accenture has partnered with United Way on the Social Innovation Accelerator, and we continue to be inspired by the scale and impact of the program. The Accelerator fellows represent the best of North Texas, each with a unique mission and drive, but all bound by selfless dedication to help North Texas be the best it can be for all people.”

– Jorge Corral, Dallas Office Managing Director, Accenture, United Way Board Member



served by Accelerator alumni



invested through the Accelerator and The Pitch



of mentoring and coaching provided to 2022-23 fellows

## Social Innovation Accelerator Investors



CAROL AND KEVIN MARCH  
MARCH TOCQUEVILLE  
FELLOWS INITIATIVE

THE EUGENE MCDERMOTT  
FOUNDATION



SARA &  
GARY AHR



THE MOOZIE  
FOUNDATION  
Grandchildren of  
Caroline Rose Hunt



MELANIE AND SCOTT  
SCHOENVOGEL



## Impact Investing

Since 2020, United Way has tapped into the power of impact investing: supporting for-profit ventures that create a meaningful social impact and then re-investing any return on our investments into new initiatives. Most recently, we partnered with Draper Richards Kaplan (DRK) Foundation to launch the North Texas United Impact Fund, which delivers targeted investments in historically underinvested communities. The fund identifies, funds and supports promising early-stage social enterprises working to drive positive outcomes to the most vulnerable in the region. Any returns on these discrete social impact investments are recycled into the fund.

In late 2023, the fund identified our first two investments, Child Poverty Action Lab and Texas Water Trade. These organizations will each receive \$300,000 in grant funding over three years as well as deep capacity-building support.



“United Way of Metropolitan Dallas has built a highly effective engine for fueling the impact of social entrepreneurs. At DRK Foundation, we are proud to partner with them to support some of North Texas’ most exciting early-stage enterprises that are poised to make a lasting impact on society’s most complex problems.”

– Robert Steven Kaplan, Co-Chair, Draper Richards Kaplan Foundation Board





# Advocating for Change

Advocacy is one of the ways we drive systemic change in education, income and health. This year, during the 140 days of the Texas Legislature’s regular session, we united the community to speak up and speak out on issues that directly impact North Texans. We also lent our expertise on important topics of debate, including rental assistance and home visiting programs, and hosted informational events to give our advocates a full picture of complex topics affecting our region.

- **907** NORTH TEXANS advocated with United Way
- **30** LEGISLATORS engaged during United Way Day at the Capitol
- **166** BILLS TRACKED that touch on our education, income and health goals
- **\$65** MILLION in funding secured for early childhood development programs
- **\$1.8** MILLION in extra funding secured for Texas’ 211 Referral Helpline

“If you want to make big change that impacts a broad number of people, advocacy is a key component of reaching your desired goals.”

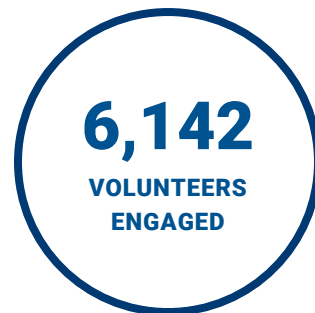
– Karen Tavana, Women of Tocqueville Steering Committee and United Way Advocate and Volunteer, Texas Instruments (Retired)

Scan to sign up for  
Advocacy Alerts



# Volunteering with Purpose

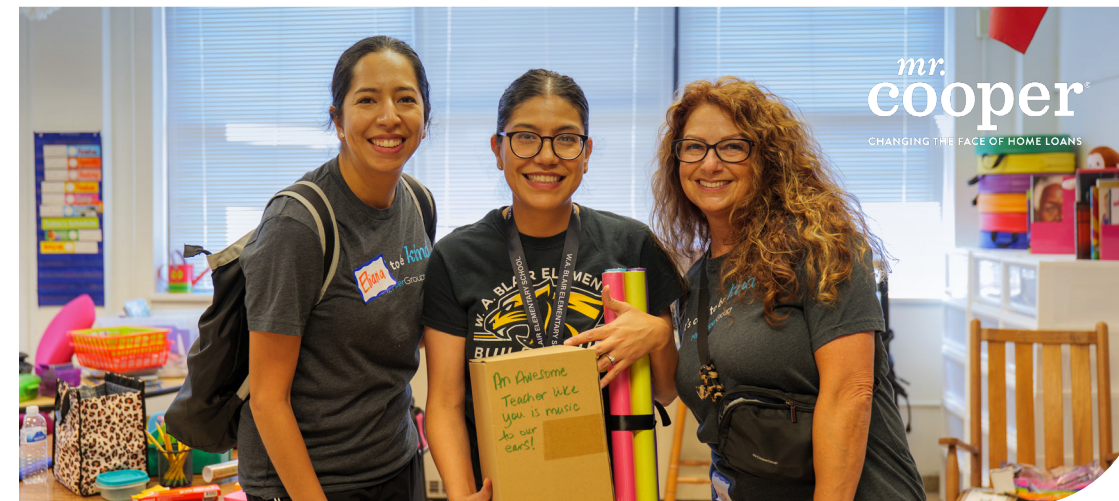
Each year, United Way brings together corporate partners, community organizations and individual change-seekers who want to invest their time and talents to improve access to education, income and health in North Texas.



in education, income  
and health initiatives



dedicated to improving  
North Texas



“

United Way of Metropolitan Dallas plays a significant role in creating opportunity for all North Texans, and our support for them through the years reflects our confidence in their ability to address our community’s most critical needs.”

– Andy Smith, Director of Giving and Volunteering, Texas Instruments, Executive Director, Texas Instruments Foundation



“Together with United Way of Metropolitan Dallas, we have a shared vision: powering a better way forward. We’ve seen firsthand how our investment creates measurable impact in education, income and health. Vistra is committed to creating stronger, more equitable communities, and we couldn’t ask for a better partner.”

– Jim Burke, President and CEO, Vistra Corp



“We’re proud to continue our partnership with United Way of Metropolitan Dallas to inspire a love of reading and education, one of the building blocks of opportunity toward reaching a life full of potential.”

– Michelle Vopni, Dallas Office Managing Partner, Ernst & Young

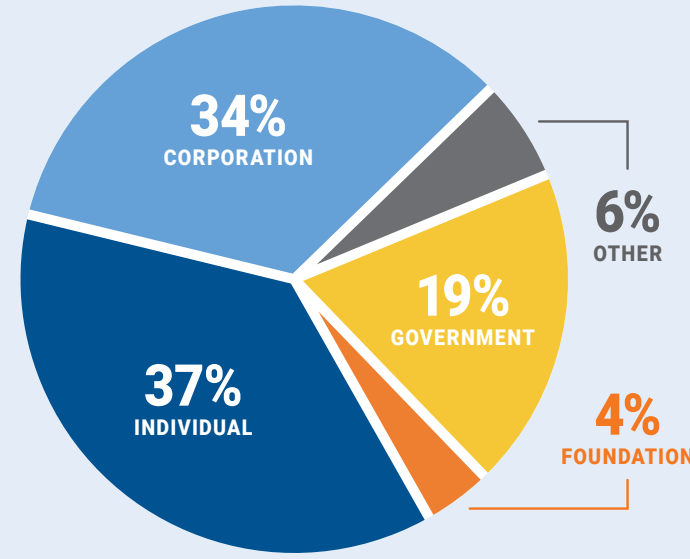




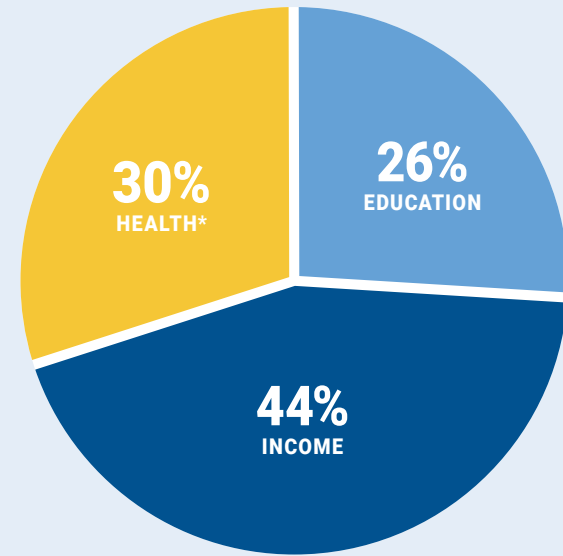
# Driving Meaningful Change

Throughout fiscal year 2023, the Live United movement funded meaningful impact for more North Texas neighbors than ever before.

\*These figures are drawn from unaudited financial statements, which are subject to differ from our final audited financial statements.



Where Our Funding Comes From



How We Invest in Opportunity for All

# Financial Statement Fiscal Year 2023

July 1, 2022 - June 30, 2023



<b>Support &amp; Revenues</b>		<b>67,366,672</b>
Grant & Contribution Revenue		50,302,940
Government Contract Revenue		12,242,693
UWFMD (Foundation) Grant		2,500,000
Other Revenue Sources		1,593,294
In-Kind Goods & Services		727,745
<b>Expenses</b>		<b>51,976,074</b>
Program Services		43,736,999
Fundraising		5,266,382
Management & General		2,972,693
<b>Assets</b>		<b>58,652,292</b>
Current Assets		41,442,714
Land, Building, & Equipment		4,496,477
Other Long-Term Assets		12,713,101
<b>Liabilities &amp; Net Assets</b>		<b>58,652,292</b>
Current Liabilities		12,686,865
Without Donor Restriction		10,566,660
With Donor Restriction		35,398,767

\*Excludes multi-year government grants not dispursed within fiscal year

## Our corporate partners LEAD UNITED to create lasting change in North Texas



Accenture	Central Market H-E-B	Frost Bank	Locke Lord LLP	Samsung Telecommunications America
Amazon	Charles Schwab & Co Inc.	FTI Consulting	Market Street-United	Santander Consumer USA
Amegy Bank N.A.	Clampitt Paper Company of Dallas	GEICO	McKesson Corp	Satori Capital
American Automobile Association	Contran Corporation	Grant Thornton LLP	Morrison Products	Siemer Institute for Family
Arcosa	Costco	Haynes and Boone, LLP	Mr. Cooper	Stability Solar Turbines
Atmos Energy Corporation	Deloitte	Hilti North America	Oncor	Southern Methodist University
Axxess	DFW International Airport	HOLT CAT	PACCAR Financial Corporation	Target Corporation
Baker Botts L.L.P.	Dynacraft	Humana Inc.	Pioneer Frozen Foods, Inc.	TDIndustries
Baker Tilly	East West Bank	IBM	PlainsCapital Corporation	Tenaska, Inc.
Bank of America	Enterprise Rent-A-Car	Illinois Tool Works Inc. (ITW)	PNC Bank	Tenet Healthcare Corporation
Bank of Texas	Exxon Mobil Corporation	JE Dunn South Central, Inc.	Pratt & Whitney	Texas Mutual Insurance Company
Baylor Scott and White Health	EY	Jones Day	PwC	Toyota Motor North America
BMO Harris Bank	Federal Reserve Bank of Dallas	JPMorgan Chase	QuikTrip Corporation	Transamerica Life & Protection
Burns & McDonnell	FedEx Office	Kimberly-Clark Corporation	Raymond James & Associates	Truist
CGI Inc.	Fiserv/Mortgage Servicing Systems	Kirkland & Ellis LLP	Raytheon	USAA
Capital One Bank	Fluor Corporation	KKR	RealPage, Inc.	Wells Fargo
Carrington Coleman	FM Global	KPMG LLP	Regency Centers	
Centene Management Company LLC	Freese and Nichols, Inc.	Lennox International Inc.	Regions Bank	

\*Partners with logos featured support United Way of Metropolitan Dallas with investments of \$1 million and above



## Partner with Us

Join the hundreds of organizations that have chosen United Way as their trusted corporate social responsibility partner. Together, we can create meaningful, measurable impact right here in North Texas.



Scan to learn more



“We believe that strong communities build strong companies, and strong companies build strong communities—a belief that supports our ambition to be a good neighbor and a company we are personally proud to work for. United Way plays a huge role in helping us achieve that ambition.”

– Haviv Ilan, President and CEO, Texas Instruments, United Way Centennial CEO Advisory Council Member



“We are proud to partner with United Way to improve lives across North Texas and further make a lasting impact on our community by demonstrating the Celanese vision of improving the world and everyday life through our people, chemistry and innovation.”

– Lori Ryerkerk, Chairman, President & CEO, Celanese Corp., United Way Board Member, United Way Centennial CEO Advisory Council Member



“At BCG, our purpose is to tackle today’s most urgent challenges. By partnering with United Way, we get to the root of many of the systemic problems impacting North Texas and address them in effective, innovative ways that create visible, measurable change.”

– David Martin, Managing Director and Senior Partner, The Boston Consulting Group (BCG), United Way Board Member



# Our Leadership

## United Way of Metropolitan Dallas Board of Directors 2022-2023

### OFFICERS

**Steven Williams, Chair**  
Chief Executive Officer,  
PepsiCo Foods North America

**Charlene Lake, Vice Chair**  
Senior Vice President, Corporate Social  
Responsibility and Chief Sustainability Officer, AT&T

**Jennifer Sampson, President**  
McDermott-Templeton President  
and Chief Executive Officer,  
United Way of Metropolitan Dallas

**Michelle Vopni, Treasurer**  
Dallas Managing Partner, Ernst & Young LLP (EY)

### COMMITTEE CHAIRS AND AT-LARGE MEMBERS

**Richard Fedock, Chair – Audit  
& Ethics Committee**  
Senior Executive (Retired), Exxon Mobil Corporation

**Ed Galante, Special Appointment (ex-officio)**  
Community Volunteer

**Terri West, Chair – UWFMD;  
Chair – Compensation Committee**  
Chair, Texas Instruments Foundation

**Bob Wright, Chair – Community  
Impact Committee**  
Founder, Wright.law

### MEMBERS

**Dan Berner**  
North Texas Managing Partner, Deloitte

**Karl Bovee**  
Senior Vice President, Southwest Region  
Executive, Bank of America

**Antonio Carrillo**  
President and Chief Executive Officer,  
Arcosa

**Jorge Corral**  
Dallas Office Managing Director,  
Southwest Region, Accenture

**Regen Horchow**  
Early Matters Dallas

**Scott Hudson**  
President, Vistra Retail

**Christy Jacoby**  
Chief Financial Officer, PepsiCo  
Global Business Services

**Sandi Karrmann**  
Chief Human Resources Officer,  
Kimberly-Clark

**Gail McDonald**  
President, Transition Resources, Inc.

**Martina McIsaac**  
EVP and Chief Operating Officer,  
MSC Industrial Supply

**Angela Martin**  
Managing Director, U.S. Strategic  
Partnerships, JPMorgan Chase

**David Martin**  
Managing Director & Senior Partner,  
The Boston Consulting Group (BCG)

**Scott Moore**  
Managing Partner, Greater Texas,  
PricewaterhouseCoopers (PwC)

**John Olajide**  
Founder and Chief Executive Officer,  
Axxess

**Sandra Phillips Rogers**  
General Counsel, Chief Legal Officer  
and Corporate Secretary, Toyota  
Motor North America, Inc.

**Lori Ryerkerk**  
Chairman, Chief Executive Officer  
and President, Celanese Corporation

**Jennifer Saenz**  
Executive Vice President  
and Chief Merchandising Officer,  
Albertsons Companies

**Jean Savage**  
Chief Executive Officer and  
President,  
Trinity Industries

**Peter Sefzik**  
Executive Director, Business Bank,  
Comerica Bank

**Cynthia Hoff Trochu**  
Senior Vice President,  
Secretary and General Counsel,  
Texas Instruments

## Annual Campaign Chair 2022-2023

**Jean Savage**  
Chief Executive Officer  
and President, Trinity Industries

## United Way Senior Leadership Team

**Jennifer Sampson**  
McDermott-Templeton President  
and Chief Executive Officer

**Susan Hoff**  
Chief Strategy and Impact Officer

**Janice Harissis**  
Chief Financial Officer

**Kathy Limmer**  
Chief Growth Officer

**Cynthia Round**  
Chief Brand Strategist

**Rob Shearer**  
Chief Communications Officer



## United Way Foundation of Metropolitan Dallas Board of Directors 2022-2023

### OFFICERS

**Terri West, Chair**  
Chair, Texas Instruments Foundation

**Clint McDonnough, Vice Chair**  
Retired Partner, Ernst & Young LLP (EY)

**Kevin March, Secretary/Treasurer,  
Investment Committee Chair**  
Retired Chief Financial Officer,  
Texas Instruments

**Jennifer Sampson, President**  
McDermott-Templeton President  
and Chief Executive Officer,  
United Way of Metropolitan Dallas

### MEMBERS

**Millie Bradley**  
Retired General Auditor,  
Exxon Mobil Corporation

**Hal Brierley**  
Executive Chairman,  
The Brierley Group

**Jim Burke**  
President and Chief Executive Officer,  
Vistra Corp

**Tom Codd**  
Chief People Officer, Axxess

**Jason Downing**  
Vice Chairman and U.S. Deloitte Private  
Leader, Deloitte LLP

**Curtis M. FitzGerald**  
Retired Manager, Benefits Finance &  
Investment, Exxon Mobil Corporation

**Barry A. Fromberg**  
Managing Partner,  
Creekpoint Capital LLC

**Edward G. Galante**  
Community Volunteer

**Erin George**  
Dallas Managing Director and Senior Partner,  
The Boston Consulting Group (BCG)

**Carol Glendenning**  
Partner, Clark Hill Strasburger PLC

**Peter Kline**  
Retired President,  
Children's Medical Center Foundation

**Pedro Lerma**  
Principal, Founder and Chief Executive  
Officer, LERMA Agency

**Anne Motsenbocker**  
Retired Managing Director,  
JPMorgan Chase

**Ron Parker**  
Retired SVP for Human Resources,  
PepsiCo/Frito-Lay, Inc.

**Stanley A. Rabin**  
Retired Chairman and Chief Executive Officer,  
Commercial Metals Company

**Dave C. Rader**  
Retired Chief Financial Officer,  
Frito-Lay, Inc.

**Carolyn Perot Rathjen**  
Vice President / Executive Director,  
The Perot Foundation

**Debbie Taylor**  
Retired Director of Community  
Development – Southwest Region, Citi

**Mary Templeton**  
Community Volunteer

**Debra von Storch**  
Retired Partner,  
Ernst & Young LLP (EY)

**W. Kelvin Walker**  
Chief Executive Officer,  
Dallas Citizens Council

### EMERITI DIRECTORS

**David W. Biegler**  
Chairman, Southcross Energy

**Becky Bright**  
Civic Leader

**Liz Minyard**  
Former Co-Chair and Chief Executive  
Officer, Minyard Food Stores

**Erle Nye**  
Chairman Emeritus, TXU





# A Growing Movement: United Way Tocqueville Society

The Live United movement consistently attracts extraordinary individuals who are inspired to invest their time and talents with United Way because of the measurable impact we can make—together.

As we march to our Centennial and our second century of service to the North Texas community, we are so grateful for and inspired by supporters like our Tocqueville Society, which attracted more than 120 new members this year; the Women of Tocqueville, who are investing directly in North Texas women and children; and the March Tocqueville Fellows and Teens United, the next generation of change-seekers who are already working to build a community that is more equitable for all.

**To every member of the Live United movement who has played a role in changing so many lives this year—thank you.**



“The 2022-2023 campaign year has been a tremendous success for the mighty, mighty Women of Tocqueville. We increased the frequency and expanded the geographic scope of our ‘Connections’ networking events, demonstrated the strength and reach of our collective network through in-person advocacy efforts, and invested in the future of social innovation through the Women of Tocqueville Fund for Women and Children. All these efforts advance United Way’s work toward ensuring that all North Texans have access to the building blocks of opportunity—education, income and health.”

– Mandy J. Austin, Dallas Market President, Bank of Texas, and 2022-2023 Women of Tocqueville Chair

“Ours is the first-ever Women of Tocqueville-led fund of its kind at any United Way in the country. As Women of Tocqueville members, empowering women and children are the pillars of our organization and are at the center of all we do.”

– Kristy Faus, Co-founder, United Way Women of Tocqueville Fund for Women and Children

“

“Thank you to our Tocqueville leadership; without them, we wouldn’t have been able to accomplish all that we did in the last year. In 2022, we launched our goal to grow the United Way of Metropolitan Dallas’ Tocqueville chapter to become the largest in the U.S., and we have made tremendous progress. Last year, 121 new supporters joined the Tocqueville Society...bringing together more resources to support our goals in Aspire United 2030 and to provide all communities in North Texas with access to opportunities.”

– Erin Nealy Cox and Trey Cox, 2022-2025 Co-Chairs, Ruth Sharp Altshuler Tocqueville Society



“For our family, the Tocqueville Society is a powerful way to support United Way’s important work here in North Texas while engaging with like-minded, local philanthropic leaders in interesting ways throughout the year.”

– Laura and Jason Downing, 2022-2025 Co-Chairs, Ruth Sharp Altshuler Tocqueville Society \$25,000 Circle



“We’ve been long-time believers that if you want to live in a great community, you have to invest in a great community. With the March Fellows program, we’re building the next generation of giving leaders in North Texas.”

– Carol and Kevin March, Founders, United Way March Tocqueville Fellows Initiative



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“Kimberly-Clark has a long history of partnering with United Way to make a real impact in our local communities, which has inspired me to become personally involved in this important work. I call North Texas home, so naturally I want this great place to be the very best it can be—and United Way is helping to make that a reality.”

– *Mike Hsu, Chairman and CEO, Kimberly-Clark Corp., 2023-2025 Chair, Ruth Sharp Altshuler \$100,000 Circle and United Way Centennial CEO Advisory Council Member*

“It’s incredible to see so many North Texans and local organizations come together to make our community a better place for everyone. By investing in United Way, we can all make a difference for our neighbors who simply need greater opportunity.”

– *Carol and Don Glendenning, 2018-2022 Co-Chairs, Ruth Sharp Altshuler Tocqueville Society \$25,000 Circle*

“Through Teens United, I believe we can make a positive impact on our community, while fostering lifelong friendships with like-minded individuals. Together, step-by-step, we can help make a brighter future possible for our city.”

– *Hilton Sampson, 2023 Teens United Co-Chair*

“No individual or organization can singlehandedly change North Texas for the better. Meaningful progress requires a community-wide effort and innovative thinking. Being part of the Live United movement is one of the most effective ways to create an impact that people will truly feel in their lives.”

– *Grace Cook, Trustee, The Eugene McDermott Foundation, United Way Innovation Lab Committee Member, United Way March Tocqueville Fellow and Tocqueville Cabinet Member*



# United Way Committee Leadership

Thank you to the business and community leaders who volunteered their time to lead United Way committees in support of our goals.

**Jim Adams**, Chair, Social Innovation Lab Committee

**Mandy Austin**, Chair, Women of Tocqueville

**Brent Chaney**, Co-Chair, Advocacy Committee

**Erin Nealy Cox and Trey Cox**, Co-Chairs, Ruth Sharp Altshuler Tocqueville Society

**Laura and Jason Downing**, Co-Chairs, Ruth Sharp Altshuler Tocqueville Society \$25,000 Circle

**Richard Fedock**, Chair, Audit and Ethics Committee

**Edward Galante**, Co-Chair, Unite Forever Campaign

**Lindsey Hughes**, Co-Chair, Advocacy Committee

**Bob Kraut**, Co-Chair, Social Innovation Accelerator Committee

**Shawn Leamon**, Co-Chair, Social Innovation Accelerator Committee

**Robbi Luxbacher**, Chair, Women of Tocqueville Fund Advisory Council

**Kevin March**, Chair, Investment Committee

**Mary Templeton**, Co-Chair, Unite Forever Campaign

**Michelle Vopni**, Chair, Finance Committee

**Bob Wright**, Chair, Community Impact Committee



# Looking Ahead

Even as overall levels of charitable giving fall across the country, our region remains an anomaly, with record numbers of North Texans investing their time and resources to make this a better place to live and work—for everyone. Together, we are building incredible momentum and expanding our impact as we march toward our Centennial anniversary in 2025.

Our movement has been bolstered by unprecedented support at all levels, including several strategic partnerships and million dollar plus investments from corporate leaders in North Texas—powerful endorsements of our ability to deliver on our community impact goals.

Our Centennial CEO Advisory Council is another example of the dedication of our supporters and our role as a leader in North Texas philanthropy. Facilitated in partnership with Boston Consulting Group, the Council comprises local CEOs and leaders who have stepped up to provide diverse thinking and strategic networking to help guide the entire Live United movement toward our collective 10-year Aspire United 2030 goals, through our Centennial anniversary and into our second century of impact.

**Together, we truly are building a community-wide coalition of change-seekers who are invested in the future of this great region.**



JAIME R. CARRERO FOR THE CHRONICLE

The United Way of Metropolitan Dallas has been “unapologetically aggressive in reaching out” to corporate leaders who have relocated to the region, says the organization’s CEO, Jennifer Sampson

With recent news about downward pressures on corporate giving, *The Chronicle of Philanthropy* took an in-depth look at the future of this philanthropic channel, with a particular focus on Dallas as a city where corporate philanthropy remains strong. The reporting relied on United Way of Metropolitan Dallas as a primary source for information about Dallas philanthropy, highlighting programs like our Digital Bridges partnership with AT&T. United Way was positively positioned as an organization driving innovative programs and partnerships, building relationships across the corporate landscape.



**“There is no other place in North Texas for corporate leadership and companies to engage to create lasting change in education, income and health.”**

– **Curt Farmer, Chairman, President and CEO of Comerica Incorporated and Comerica Bank, 2023-2024 United Way Campaign Chair**

**“United Way has long played an empowering role within the North Texas community, ensuring that the efforts of corporate, philanthropic, education, civic and nonprofit players reinforce one another for the good of the community. These coordinated efforts have already paid dividends across United Way’s three pillars.”**

– **Overview of United Way of Metro Dallas’ Current Approach and Future Opportunities** *whitepaper, Boston Consulting Group, August 2023*



## CENTENNIAL CEO ADVISORY COUNCIL CO-CHAIRS

### Curt Farmer

Chairman, President and CEO of Comerica Incorporated and Comerica Bank, 2023-2024 United Way Campaign Chair

### Jean Savage

CEO and President, Trinity Industries  
2022-2023 United Way Campaign Chair

### Steven Williams

CEO, PepsiCo Foods North America  
2022-2024 UWMD Board Chair, 2024-2025 United Way Campaign Chair

## MEMBERS

### Jim Burke

President and CEO, Vistra Corp.

### Antonio Carrillo

President and CEO, Arcosa

### Mike Hsu

Chairman and CEO, Kimberly-Clark Corporation

### Haviv Ilan

President and CEO, Texas Instruments

### Aasem Khalil

Head of Dallas Office, Goldman Sachs

### Chris Kleinert

President and CEO, Hunt Investment Holdings, LLC

### Michael Levy

CEO, Crow Holdings

### Lorie Logan

President and CEO, Federal Reserve Bank of Dallas

### Tom Luce

Founder and Chairman Emeritus, Texas 2036

### Fred Perpall

CEO, The Beck Group

### Troy Rudd

CEO, AECOM

### G. Brint Ryan

Chairman and CEO, Ryan, LLC

### Lori Ryerkerk

Chairman, CEO and President, Celanese Corporation

### John Stankey

CEO, AT&T

### Rich Templeton

Chairman of the Board, Texas Instruments

### Brian Tyler

CEO, McKesson Corporation

### Jim Umpleby

Chairman and CEO, Caterpillar, Inc.

# A Strong Foundation for Our Second Century

In 2022, United Way of Metropolitan Dallas received a historic \$15 million donation from The Perot Foundation, the largest single investment in the 98-year history of our organization.

This extraordinary investment has been catalytic for our community, not only for the size of the commitment but equally important for how United Way is structured to leverage it. With carefully researched goals for our region and strategic partners who are deeply invested in achieving them, we are uniquely positioned to create transformative change across our North Texas communities.

With this investment, we are harnessing the power of many to directly address systemic barriers and advance racial equity that will change lives for generations to come. The Perot gift has accelerated impact with 144 community impact partners, which range from long-standing proven impact providers to grassroots organizations bringing bold new strategies to our community's most pervasive challenges in education, income and health.

United, we can create lasting, systems-level change that will positively impact individuals and families across North Texas. This investment by The Perot Foundation has added even more energy to our community-wide Live United movement, accelerating progress toward our Aspire United 2030 goals and bolstering a strong foundation as we march toward our second century of service.



“

**“This investment is a testament to the meaningful impact United Way and its trusted network of community impact partners create. We hope this gift inspires others to join us in advancing United Way’s Aspire United 2030 goals.”**

*– Carolyn Perot Rathjen, VP and Executive Director, The Perot Foundation*

**TOGETHER, WE’RE CREATING ACCESS AND OPPORTUNITY FOR ALL NORTH TEXANS.**



Metropolitan Dallas

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Dallas, TX 75202

[www.unitedwaydallas.org](http://www.unitedwaydallas.org)

