



**UBT** Union Bank & Trust

## 2022 Community Impact Report

Our local nonprofits do such an incredible job — every day — of supporting thousands of people in need, and it's vital that UBT and other companies, in turn, support the people and missions of those nonprofits. Here's a look at how the people of UBT, working side by side with these nonprofits, impacted people's lives through philanthropy and green initiatives.

**UBT** Union Bank & Trust®

If you're reading this, we already have something in common: caring for our community.

I'm so excited to share this Community Impact report with you. It's both rewarding and humbling to quantify the efforts of hundreds of Union Bank & Trust employees. When my grandfather, Jay Dunlap, purchased the bank in 1965, he started a strong tradition of supporting the communities we serve that is deeply ingrained in our culture.

Today, two generations of family leadership later, that commitment is as strong as ever. We're here to help individuals, families, businesses, and neighborhoods thrive. We all live, work, play, and pray here. For us, it's natural to want to make our communities the best they can be through philanthropy and green initiatives that impact many people's lives while decreasing our impact on the environment.

It's this feeling of connectedness that makes our communities so great, especially during tough times. A helping hand, pat on the back, and encouraging words are never too far away. And in 2022, that commitment even extended to the amazing people in Ukraine.

So let's take a look at just some of the amazing work being done by our area nonprofits, and how the people of UBT rolled up their sleeves to pitch in, both through our Community Involvement Program and their own initiatives that they're passionate about. Our people are volunteers. Our people are board members. Our people are coaches, mentors, and prayer leaders. But most of all, our people are your people.

Thank you for reading this report, and as you read it, know that we're eagerly working to make 2023 even better and brighter for our communities.

Sincerely,



Jason Muhleisen  
Executive Vice President, Union Bank & Trust





An aerial photograph of a city, likely Lincoln, Nebraska, showing a mix of urban buildings and residential areas. The image is split diagonally from the bottom-left to the top-right. The upper-left portion is in black and white, showing a dense urban core with various skyscrapers and commercial buildings. The lower-right portion is in color, showing a more suburban or residential area with smaller houses, trees, and greenery. The transition is smooth, with the diagonal line acting as a visual separator between the two different parts of the city.

## Community Outreach

### Overall charitable giving

- Focus areas: Education, arts, community betterment, and direct services
- Capital campaigns supported: Eight, including Lincoln Parks Foundation, Community Action Partnership of Lancaster and Saunders Counties, Malone Community Center, Eastmont Towers Foundation, Camp Sonshine, and Boys & Girls Club of Lincoln
- Number of nonprofits supported: 200+
- Donation totals: More than \$2 million to nonprofits, not including \$1 million for The Big Give and \$1.5 million for the Northwest High School Football Stadium

## Financial Literacy program

The UBT Financial Literacy program is designed to serve nonprofit organizations within Lincoln, Nebraska. For many Lincoln residents, there is a need to learn basic money management skills that build a foundation for a better financial life. Currently, these valuable financial skills may not be shared at home, and they haven't always been taught in our schools. There is simply an absence of knowledge when it comes to money, and the Financial Literacy program is here to bridge that gap in our community.

- 31 community workshops hosted
- 14 nonprofit organizations supported
- 352 community members served
- 24 individual coaching sessions



### Brittany Planos

Financial Literacy Program Manager



"There was a time in my life where I couldn't find stable work. I was sleeping on the floor, had no money in my bank account, and everything I owned fit in my car. Traditional personal financial education hasn't always been relevant or accessible for community members from low-income backgrounds.

I am seeking to change that.

Financial education is an important part of community wellness. UBT's Financial Literacy program removes barriers by providing free financial literacy workshops within the community. The program empowers youth and adults by teaching real-world skills to take steps forward to financial independence. Through UBT's Financial Literacy program, I am grateful to be able to support community members by providing a pathway to a more equitable financial future."





### **Magic Moments 20th anniversary**

Union Bank celebrated a milestone 20th year of our Magic Moments program in 2022. This program is a great opportunity for us to give back; we invite Lincoln churches, organizations, and community members to submit nominations on behalf of neighbors, friends, or family who deserve recognition or could use some extra love. This year, in honor of our 20th anniversary, we doubled the number of recipients from 10 to 20!

► **[ubt.com/magicmoments](https://ubt.com/magicmoments)**

See all the stories, photos, and a video highlighting some special moments from the program.

## Learn to Dream scholarships

The Learn to Dream Scholarship, established in 2007, is generously funded by the Acklie Charitable Foundation, Nelnet, and Union Bank & Trust, and is a partnership with Southeast Community College. The scholarships give economically disadvantaged students the opportunity to complete up to 60 semester credit hours at one of the Southeast Community College campuses in Beatrice, Lincoln, and Milford without paying tuition and fees. All juniors and seniors who qualify for free or reduced lunch are eligible for the scholarship. UBT provides \$560,000 each year toward Learn to Dream and People of Prosperity scholarships. All told, more than 500 scholarships were awarded throughout 2022 and each year prior.



## Other scholarships funded by UBT include:

- Bryan Foundation — Bryan College of Health Sciences Scholarship
- Lincoln Journal Star — Inspire Scholarship
- Lincoln Education Foundation — Future Teacher Scholarship
- LPS Foundation — Financial Literacy Excellence Award
- Lincoln G.O.L.D. — G.O.L.D. Scholarship

Top left to right: Barb Hetcko, LEAR; Margie Nowak, LEAR; Jim Baumann, Union Bank; Mary Lou Sandell, LEAR  
Bottom left to right: La'Rae Pickens-Bonebright, UNL; Makenzie Haskins-Rowe, Wesleyan; Ashley Kallhoff, UNL; Jordan DeVoogd, UNL



"Union Bank & Trust was honored to again partner with the Lincoln Education Association Retired Teachers (LEAR) to present scholarships to these recipients. I'm guessing we all remember a favorite teacher from our past — each with their own personal style. Some had a great sense of humor, some were good listeners, some were patient, and maybe others were good at conveying difficult concepts — there are lots of different reasons why we remember great teachers. But there are also many similarities in why they are our favorites. Things like honesty and integrity. They're real, genuine, solid individuals who loved to do what they do.

To our scholarship recipients, always keep in mind the tremendous and powerful influence that a good teacher has on students. Students learn from, and never forget, a good teacher who loves to do what they do."

▲ **Jim Baumann**, Vice President & Donations Committee member

## Office space for TeamMates

In Lincoln, office space for the TeamMates mentoring program is provided by UBT, complementing their home office in Omaha.

## VIP (Ventures in Partnership) school program

The VIP program was started by LPS in the 1980s, and Union Bank started participating in the program in 1997. The goal of this program was to pair schools and programs with businesses and organizations to work on mutually beneficial projects. While this program was discontinued by LPS in 2004, UBT continues to have a VIP relationship with Calvert Elementary School, Morley Elementary School, Schoo Middle School, and Lincoln Southwest High School.

- Teacher Appreciation Day luncheon for all staff at three schools
  - Served 70 staff members
- Read Across America at Morley and Calvert
  - All grades K-5, about 25 volunteers at each school
- Teach financial literacy in classes
  - Fourth and fifth grades at Morley and Calvert Schools; one class per grade each semester
- Provide the opportunity for nine students to have lunch with UBT professionals at a UBT location
- Provide opportunities for students to job shadow at UBT's 70th & Pioneers location
  - Five fifth graders from Morley shadowed UBT staff
- Employees purchase and donate items wanted by four families of LPS students during the holiday season
- Assist with Backpack Food Program at Schoo Middle School
  - Once a month during the school year, two employees help facilitate a food distribution site, working with the Food Bank of Lincoln





## Environmental Initiatives



**Green Team:** UBT's Green Team was formed with the mission of implementing and improving "green" initiatives bank-wide. The team's vision is to make UBT a sustainable, environmentally friendly leader in all communities we serve — now and in the future.



**Recycling:** Recycling services are in use at nearly every UBT location (25 sites total). UBT recycled 20,780 pounds of metal in 2022.



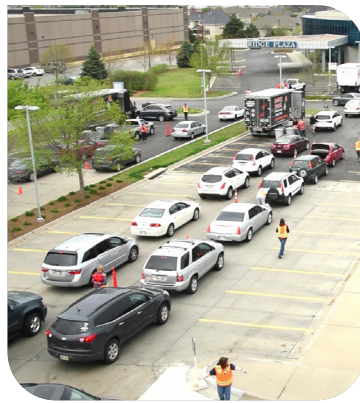
**Compost programs:** Composting service has been established at five larger UBT offices.



**Energy reduction:** Fluorescent bulbs were replaced with LED fixtures at four locations per year, cutting energy consumption in those locations by 66%.



**Furniture donations:** Eight office sets were donated to local nonprofits consisting of desk, chair, guest chairs, and bookcases.



### Shred Day: April 2022

Shred Day is an annual community event that offers community members free document shredding services to help them avoid identity theft and fraud, reduce clutter, and help the environment. We partner with Paper Tiger to provide this service. We also partner with a local nonprofit to collect in-kind donations on their behalf. In 2022, we partnered with Community Action Partnership of Lancaster and Saunders Counties to collect 2,600 personal hygiene items.

- 2,400 cars came through
- 52,300 pounds of documents were shredded



[ubt.com/shredday](https://ubt.com/shredday)

See the video and get more information about our annual day!

## Annual trash pickup and recycling day

In April 2022, 118 volunteers on 12 teams of UBT employees fanned out to sites all over the city, picking up litter, trash, and recyclable materials. We hit parks, schools, and other public areas in an effort to make our city just a little more beautiful.

### Picking it up:

- Partner: Keep Lincoln & Lancaster County Beautiful (KLLCB)
- Volunteers: 118
- Number of sites: 7
- Weight of collected trash: 539 pounds
- Weight of recycling: 98 pounds (recycling is less due to guidelines regarding what we were able to recycle)
- Distance covered: 105 miles/57 acres
- We were awarded a grant of \$3,000, which we in turn split between the following:
  - Lincoln Food Fort
  - Southern Heights Food Forest



## Employee Volunteer Spotlight: Junior Achievement

"I started volunteering for JA six years ago because I love working with kids. To me, it's something small I can do to have an impact on the future of our community. I started with one class and still volunteer for that same teacher every year. Now, I average about seven classes per school year, ranging from kindergarten to fifth grade. The kids are so excited to learn about how to make good money choices, how goods and services flow throughout the world, and how to become an entrepreneur. The JA materials make it fun for the students to learn, and the kids are so creative with their ideas. It has been fun to expand on their learning. One year with our VIP School Partner, Calvert Elementary, the students took an idea of creating their own business of a lemonade stand to reality. They set up a stand outside of Calvert, and all proceeds went to help flood victims. Getting to know these kids and watching their knowledge and future possibilities grow during our sessions is what makes this experience so rewarding for me."



▲ **Jennifer Schnieders,**  
Vice President, Network Services



Michael Henkenius, Michaela Rasmussen, Jade Poggensee, Jennifer Schnieders, TJ Casady

**UBT employees named Silver Apple Society inductees by Junior Achievement in 2022 (completed 12 classes):**

- TJ Casady, Michael Henkenius, Jennifer Schnieders

**JA Red Apple Status (completed 6 classes):**

- Jade Poggensee, Michaela Rasmussen



## Community Involvement Program, Lincoln:

- 525 employees participated (75% of UBT's Lincoln employee base)
- 1,962 volunteer hours tracked (a 12% increase from 2021)
- Pet Supply Drive: supported five local nonprofits with food, toys, supplies, and \$1,025 in donations
- Personal Care Drive: supported five nonprofits with personal hygiene items and \$2,250 in donations
- Blood donations
  - Number of drives: 8
  - Number of unique donors: 135
  - Total number of employee blood donations: 330
  - Amount of blood donated: 213 units and 30 red blood cell units

## United Way/CHAD Campaign, Lincoln:

- 453 givers = 60% participation
- \$329,933 in employee pledges
- Campaign total: \$650,507 with UBT's employer match
- 178 Leadership Givers
- Second-largest campaign in Lincoln/Lancaster County

## Supporting the communities we serve

Whether we're planting trees in city parks or donating life-saving blood, we're eager to roll up our sleeves and make a difference. It's part of Union Bank's culture — employees of all levels are empowered to be leaders in philanthropy, inspiring others to consider how any contribution of time, talent, or money can change lives.

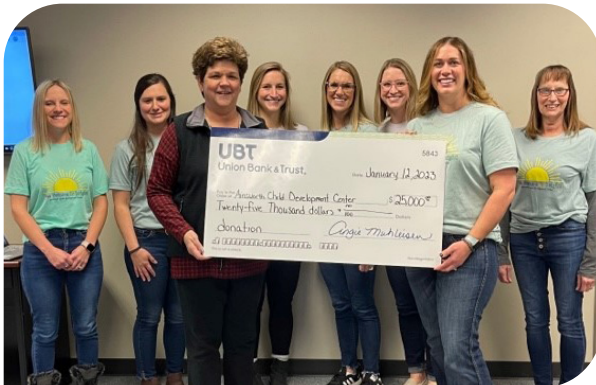


### Community Involvement in Greater Nebraska, Omaha, and Kansas:

- 112 employees participated = 80%
- 1,513 volunteer hours tracked
- 60 nonprofits supported through drives collecting much-needed items
- 41 employees donated blood
- 154 nonprofits supported through charitable giving for a total of \$325,000+
- Capital campaigns supported: Community Alliance, Grand Island Central Catholic Elementary School, York College New Student Housing, Columbus Children's Museum, Columbus Wellness Center

### United Way Campaign, Omaha:

- 49 donors = 88% participation
- \$18,579 in employee pledges
- Campaign total of \$37,279 with UBT match (8% increase from 2021)
- 19 Leadership Givers



### Nonprofit board involvement:

- 149 employees serving on nonprofit boards
- Serving 187 nonprofits

### Community recognition received for volunteerism and fundraising:

- Cornhusker State Games: Bronze Partner Award
- United Way of Lincoln & Lancaster County:
  - Second place United Way Campaign
  - Second place Resources Under Management





◀ **Lisa Nelson,**  
Senior Banker, Omaha

"One of Omaha's community service events is Project Linus, where we collect donations of materials from employees and make blankets for children in foster care, hospitals, and shelters. These blankets provide a sense of security to children who are seriously ill, traumatized, or otherwise in need. In doing so, it became very close

to my heart, as my best friend had two of her grandsons that needed bone marrow transplants. They would need to be hospitalized for around 40 days. We made blankets that year and donated two of them to the boys so they could have these during their stay in the hospital. They loved seeing the bright colored dinosaur blankets, and they kept these with them through their entire journey."

**Hope Maginnis,**  
Assistant Branch Manager, Fairbury ▶

"Bonham Theatre in Fairbury is such a big piece of history for not only the town, but in people's lives. I grew up just 20 miles away, and the Bonham was the first movie theater I ever experienced, seeing *March of the Penguins* when I was nine years old. The theater closed in 2012 for five years — a big loss for this little town, as there is only so much to do for local entertainment. The theater reopened in 2017 on a volunteer basis and is a favorite for our branch to support. Brian, the manager, is always so appreciative of our help, and we get to watch a movie on the big screen, so it's truly a win-win for everyone involved. Brian has also given a handful of us a tour of the historic building and educated us on what they are doing to keep its memory alive. I am so glad they were able to reopen their doors and allow us an opportunity to give back locally."



▶ **Alex Heinz**  
Personal Banker, York

"I volunteered time to paint the York County Fair Office because this was a facility that was extremely dated and run down in our community. The County Fair is a highlight of the summer in York, and the Fair Office is a communal gathering place to buy tickets and show off art exhibits. This upcoming year will be the York County Fair's 150th anniversary celebration, so I wanted to help refurbish the office to be a building that our community can be proud to showcase to visitors from both in and out of town. It brought me great joy to see the positive impact that the revamping of our Fair Office made not only on the building itself, but also to all fair attendees. I hope that this project helps kickstart the York County Fair Foundation's upcoming plans to showcase past pictures of the York County Fair to celebrate their 150th celebration."






## Ukraine: From Poland With Love

"After watching the devastation in Ukraine on the nightly news, I was moved — driven, in fact — to do something to help. And I felt compelled to make an impact beyond opening my checkbook; to physically assist. That sounds crazy, but I felt so strongly about being an active part of positive change, in whatever capacity presented itself. I think the point is everyone knows this war is wrong on so many levels and I truly felt the need to do something, however small, to help. When I heard of Steve Glenn's organization, Safe Harbor Ukraine, I knew instantly that this was the opportunity, and I was seizing it. I immediately started thinking about how many others at our organization would feel the same and how great it would be to make this a mission trip. The rest is history — that's the honest truth. Spending time with these refugees and seeing how they had absolutely nothing, and how they had suffered, truly makes you think. This experience was such a memorable one for all who participated, and it was no doubt a great lesson in gratitude. I believe we all learned a great deal about how lucky we are in SO many ways."

- Angie Muhleisen
- Doris Robertson
- Casey Franklin
- Matthew Clare
- Andy Kafka
- Jason McCown
- Chris Wagner
- Fred Seckman
- Jade Hood
- Hope Viets
- Jordon Kavan

**Angie Muhleisen,**   
President & CEO



### Donations made as part of Safe Harbor Ukraine:

- Total donated/paid by UBT: \$93,028  
(this covered travel expenses and donation expenses while the group was in Poland)
- An additional \$66,000 was donated to power one full month of operations



“ While helping a young Ukrainian lady named Camille, she asked me, ‘Why are you doing this?’ I responded that I have been very blessed, and I know you have been through a rough journey and I just want to help you. She gave me a big hug with tears streaming down her face. It was a truly impactful moment. ”

– Doris Robertson

### May 13–24, 2022

- The UBT team helped provide many essentials, such as personal care items, medication, clothing, and luggage
- We provided fresh fruit and other snacks to help carry everyone over between meals
- We put together and provided activities for the families, such as a trip to the zoo, a trip to an indoor jungle gym, daily trips to the park, English classes, arts and crafts, and more





Our local nonprofits are the lifeblood of this community, and never has that been more evident than over the past couple of years. They've worked hard to keep our community safe and cared for, and we decided it was our turn to give back to the local organizations who give so much to our most vulnerable citizens.

In September 2022, Union Bank gave away \$1 million, split evenly among 10 different nonprofits to fund projects or programs that are serving our community — and we looked to the community to help us determine who should get the funds. Here are the 10 nonprofits the community chose for us to fund:



### **Uplifting Paws**

Uplifting Paws therapy dog program provides the Lincoln community with comfort companions that can alleviate mental health issues caused by traumatic events, health conditions or disorders, or overall anxiety. With their \$100,000 gift, they will be able to add a full-time dog trainer to their staff that will double their impact in the community.

### **Catholic Social Services**

With their \$100,000 gift, Catholic Social Services will be able to provide financial assistance to families to help pay rent utilities and feed the growing number of people requesting food from their CSS Food Market.

### **Clinic With a Heart**

For 20 years, Clinic With a Heart has helped thousands of our neighbors access quality healthcare for free. With their \$100,000 gift, Clinic With a Heart plans to expand their free clinic services by adding a daytime primary care medical clinic, make their current space more accessible to patients, and purchase an Electronic Health Record system to better maintain patient records.





### Autism Family Network

The Autism Family Network is a community resource not only for families with autistic children, but also other developmental disabilities, learning disabilities, and physical disabilities. With their \$100,000 gift, AFN will expand their programming and outreach by providing education and training; advocating for support, services, and inclusion; hosting recreational and social activities; and funding special needs and crisis support.

### Center for People in Need

The Center for People in Need's Diaper Bank program helps keep more than 800 babies dry and healthy every month — but the diaper need in Lincoln continues to grow. With their \$100,000 gift, the CFPIN will be able to provide diapers and wipes for more low-income families.



### Camp Sonshine

Camp Sonshine will use their \$100,000 gift to help build a new recreation facility and climbing wall to continue impacting kids with powerful and positive summer camp experiences. The addition of this gym and climbing wall will provide kids with an indoor space to continue building friendships and connections on days when extreme weather makes it difficult to be outdoors.

### I've Got A Name

The statistics on sex trafficking from those working day in and day out to put a stop to it are sobering. With their \$100,000 gift, I've Got A Name's Connect to Protect initiative will provide more resources to fight sex trafficking in Lincoln, and they will host the Connect to Protect Conference, the first in Lincoln to address sex trafficking on a local level.

### Capital Humane Society

Capital Humane Society launched its Pawsitive Impact initiative in early 2022 to provide resources for income-qualified individuals to help them afford veterinary care, pet food, and supplies. With their \$100,000 gift, CHS will have the means to offer even more services through this initiative.

### Pius X Foundation

With their \$100,000 gift, Pius X Foundation will be building a new secure front entrance and central welcome center for the school, which enhances security and improves the visiting experience for students' families and community members.

### The White Cane Foundation

With their \$100,000 gift, The White Cane Foundation will accelerate their goal to provide new clothes to impoverished students in Lincoln by expanding their partnership from seven Title I elementary schools to 12.



[ubt.com/give](https://ubt.com/give)

See all the stories, photos, and video presentations to these 10 amazing organizations



For more information about UBT and our community involvement efforts, please visit [ubt.com/about](https://ubt.com/about) or contact Jill.

**Jill Smith**

Community Outreach AVP  
402.323.1447  
[jill.smith@ubt.com](mailto:jill.smith@ubt.com)



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