

UNITED WAY OF KENTUCKY 2010 Annual Report



LIVE UNITED

**21 MEMBER UNITED WAYS,
HUNDREDS OF WAYS TO
GIVE, ADVOCATE AND VOLUNTEER.**

LIVE UNITED®

Although 2010 was a year marked with trials and a depressed economy, United Way of Kentucky worked hard to ensure that local United Way organizations across the Commonwealth, along with the Kentuckians they serve, had the tools, resources and support they needed to succeed.

Over the course of the year, we worked with state and federal lawmakers to promote legislation that would help expand Kentucky 2-1-1 information and referral services to the entire state. We continued to support the Governor's KCHIP initiative and outreach to families with eligible children, in an effort to ensure that every child in Kentucky would have access to affordable health care. We supported local United Way earned income tax credit programs to help every eligible citizen take steps toward financial stability.

In March 2010, we joined over 1,000 staff and volunteers from local United Ways across the United States in Washington D.C. to advocate for issues related to education, income stability and health. We stood united with child advocates here in Kentucky at the Step Up for Kids advocacy event, and renewed our commitment to the wellbeing of all Kentucky's children by sponsoring the annual Children's Advocacy Day at the Capitol. We worked alongside our local United Ways to obtain grant funding for the *Ready by 21* initiative, and provided administrative support for the initiative's southeast regional training event held in Louisville last December.

We hosted three Professionals Council retreats, which brought together Kentucky United Way executives to network, share best practices, seek opportunities to collaborate, and build a stronger United Way community.

Thanks to the generosity of Kentucky's state employees and the employees of Enterprise Rent-A-Car, United Way of Kentucky raised over \$1.23 million for local communities through two charitable campaigns.

LIVE UNITED is more than a catch phrase. It is the foundation of everything we do. It's a credo. It's a rally cry. It's about living our lives 365 days a year in a way that constantly connects us to others. It's about creating opportunities for a better tomorrow, for all of us. While 2010 was marked with many challenges, both locally and nationally, United Way of Kentucky stood strong beside its member United Ways, and together, along with thousands of United Way supporters across the Commonwealth, we are LIVING UNITED with our fellow Kentuckians. Our most sincere thanks to you, who help make it happen.

As you read the following pages, note that each time you see an underlined word or phrase, you can click it for additional information.

About United Way of Kentucky

We serve 21 United Ways across the Commonwealth.

Our Vision

Uniting Kentuckians to Give, Advocate and Volunteer.

Our Mission

As a focused team of Leaders, we will align resources and work to advance Education, Income and Health.

Our Value Proposition

As the statewide association for local United Ways in Kentucky, we are uniquely positioned to mobilize the strengths of our collective United Way network to achieve lasting change in communities across the Commonwealth.

Our Core Values

- We believe that sustaining and strengthening local United Ways is the most effective way to create community solutions.
- We believe local United Ways will be strengthened if they are interconnected and that this whole will be stronger than the parts.
- We believe in honesty, integrity, and adding value through careful stewardship of the resources provided to us.
- We believe in treating our volunteers and customers with respect and valuing the diversity each brings to our mission.
- We believe that accountability to each other and our customers is essential to our success.



Delivering results.

In January 2009, United Way of Kentucky (UWKY) adopted a new strategic plan to achieve lasting change. Over the past two years, we have delivered on that plan. One of our core values is the belief that the whole of a system, operating as one, is stronger and more effective than any of its parts operating alone. This value is evident in any community, and remains true in our state.

Advancing the common good in Kentucky communities means building a better life for all. Every Kentucky citizen needs a chance for a quality **EDUCATION** that leads to a stable job, enough **INCOME** to support a family through retirement, and good **HEALTH**. We believe that together, united, we can make a difference today, and create hope for tomorrow.

We deliver results by increasing access to needed services for individuals and families, advocating for policies that will strengthen Kentucky's greatest asset--it's citizens, and supporting local United Ways in their ongoing efforts to advance the common good in their communities. That's how we **LIVE UNITED**.

United Way of Kentucky seems to stay ahead of the curve with the latest United Way information, best practices and most updated policies.

I am very satisfied with the support that Terry and her staff have shown me as someone new to the Kentucky United Way network.

*Chris Wilborn, Executive Director
United Way of Central Kentucky*

Increasing access to services.

UNITED WAY 2-1-1

2-1-1 is an easy to remember phone number, designated by the FCC in 2000, linking callers in need to available health and human service programs in their area. Since implementation, United Way 2-1-1 call centers across the nation, and across Kentucky, have witnessed steadily increasing call volume - specifically during the economic downturn of 2008 and 2009. In 2010, despite signs of economic recovery, people still turned to 2-1-1 for information and referral services more than ever before. The most common needs addressed, making up two-thirds of all calls to 2-1-1 in Kentucky, are income assistance, housing, utilities and food-related needs. In Kentucky, 2-1-1 is currently available to approximately 1.7 million people in 22 counties, roughly 47% of the state's population through United Way 2-1-1 call centers in Louisville, Lexington and Northern Kentucky.

The federal "Calling for 2-1-1 Act" was introduced in both the U.S. Senate and House of Representatives in 2010. Kentucky secured a record number of co-sponsors for the legislation - Ed Whitfield, Brett Guthrie, John Yarmuth and Ben Chandler. While the legislation did not pass last year, we will continue to work with our member United Ways and national partners to advocate for this or similar legislation in the future.

In Kentucky's 2010 legislative session, State Representative Jim Glenn introduced HJR 199 to direct the study of 2-1-1 services in the state by the Public Service Commission. The resolution required a study to assess the impact of 2-1-1 service and make recommendations to the General Assembly regarding the means for securing financial support for 2-1-1 service in a public-private partnership.

While the legislation did not make it out of committee during 2010 and was not introduced in the short 2011 session, we are hopeful that Representative Glenn will reintroduce it in 2012.



UNITED WAY DAY ON CAPITOL HILL - MARCH 2010

The training and knowledge sharing that United Way of Kentucky provides is invaluable.

I also appreciate the opportunity to network with other United Way Executives.

*Ashley Wright, Executive Director
United Way of Paducah -
McCracken County*



READY BY 21 TRAINING - DECEMBER 2010

Increasing access to services (continued).

KCHIP

By January 2010, after the first full year of outreach by state government, United Way organizations and other community partners, approximately 31,000 eligible Kentucky children remained without health insurance. While this number represented a 55% reduction in the number of eligible uninsured kids since the start of the Governor's KCHIP initiative, even one child who does not have access to proper health care for lack of insurance is too many.

Throughout the year, United Ways across the state continued to seek out new and innovative ways to reach families with eligible uninsured kids. United Way's efforts were recognized by Governor Steve Beshear as vital to the success of the initiative. In January 2011, Kentucky was one of eleven states recognized nationally for success in innovative approaches to outreach. Those approaches got results over the course of 2010, and by late November, only 12,000 of the original 68,000 eligible children were estimated as remaining without health insurance. United Way of Kentucky is committed to working with its partners to seek out those children and to promote KCHIP across the Commonwealth.

READY BY 21

In June 2010, United Way of Kentucky announced that, in partnership with United Way Association of South Carolina, and on behalf of the United Way Council of States, it would receive a \$50,000 grant from United Way Worldwide and Altria to build capacity among United Way state organizations to do state-level policy work - advocating across the education continuum, from birth to 21. In accordance with the grant stipulations, UWKY also provided technical assistance to the five communities chosen to pilot the work - two of which are UWKY members (Louisville and Northern KY).

In December 2010, United Way Worldwide and Metro United Way in Louisville co-hosted a *Ready by 21* training event for the five capacity grant recipients, with support from UWKY. This training offered community engagement frameworks, strategies, and tools designed to help deepen and strengthen each organizations' ability to deliver on the objectives of the *Ready by 21 framework*, and build communities committed to preparing kids for college, work and life.

When the pilots end in 2011, UWKY will continue to work both with other state organizations and with a Kentucky team working on statewide implementation.

Representing United Way through Advocacy.

Public policy advocacy is one key to advancing the common good. UWKY reviews its policy agenda annually with feedback from local United Ways.

In March 2010, UWKY President Terry Tolan joined over a thousand executives, staff and volunteers from across the country (including representatives from Metro United Way and United Way of Greater Cincinnati / Northern Kentucky) in Washington D.C. for United Way Day on Capitol Hill. In addition to increasing awareness of United Way's work across the nation and right here at home, UWKY called on Kentucky's Senators and Representatives to support the passage of the federal "Calling for 2-1-1 Act" (Senate / House).

In Frankfort, Terry continued to represent United Way on the Kentucky Commission on Philanthropy, the Governor's Task Force on Early Childhood Development and Education, and the Early Childhood Development Authority. Through these important connections, UWKY is able to ensure that the long experience and strength of the United Way system is brought to bear on important education issues facing the state.

Supporting Local United Ways.

The United Way system in Kentucky serves naturally aligned geographic areas, each with their own special needs and circumstances. UWKY provides local United Ways with training and networking opportunities that help them address those unique needs. In 2010, we convened three Professionals Council retreats, addressing a wide variety of topics, from accountability, to education, income and health mobilization, to “consultative selling”. We conducted quarterly “Communicators Councils”, to provide marketing and communications support for local United Way staff. We are available to our members for consultation and guidance 24 hours a day, as needed. Our staff and volunteers are called on each year to address boards and community groups, in support of local United Way activities.

We provide financial support to our members through two fundraising campaigns. Geographically, each covers the entire

Commonwealth, touching every county, and the proceeds from those campaigns support services all across the state.

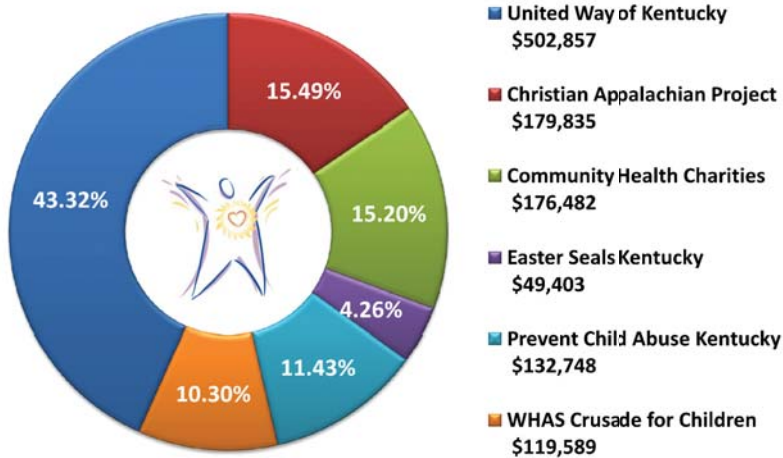
The first is the Kentucky Employees Charitable Campaign (KECC). UWKY has administered the KECC on behalf of the state since 1993. The campaign supports six federated charities, covering over a thousand agencies serving Kentucky communities. In 2010, the “Because We Care” campaign raised over \$1.16 million to assist struggling individuals and families across the Commonwealth.

Thanks to the generosity of Enterprise Rent-A-Car employees and their corporate office matching gift program, their 2010 campaign showed a 8.7% increase over 2009. Results for both campaigns are shown in the figures below.

Kentucky Employees Charitable Campaign (KECC)

<http://www.kecc.org>

Total Raised: \$1,160,914



Enterprise Rent-A-Car Campaign

Total Raised: \$72,850

United Way of Kentucky leveraged over \$1,230,000 for Kentucky communities in 2010!

Thank you Enterprise Rent-A-Car and Kentucky State Employees!

The Kentucky Employees Charitable Campaign is run efficiently and professionally. The follow-up meetings are encouraging and accountability based. I'm very impressed with the United Way of Kentucky team and feel everything was done well! Thank you for leading this tremendous effort!

*Randy Roberts, Executive Director
United Way of Franklin County*

2010 Board of Directors

United Way of Kentucky welcomed four new members to our board of directors in 2010.



MARY JO BEAN is the Vice President of Planning and Business Analysis with Norton Healthcare in Louisville. She has over 21 years of healthcare business planning experience, and joined Norton Healthcare in 1999.



BEN LARUE is the owner of LaRue Financial Advisors in Elizabethtown. He has served on the board of the Hardin County Community Foundation, as chair of the Elizabethtown Civil Service Commission, and on the board of United Way of Central Kentucky for the last three years.



SARAH MILLS works as Counsel to Stoll Keenon Ogden, PLLC in Lexington. She practices in the areas of corporate, business, finance, mergers and acquisitions, securities law and health care law. She has served on the board of United Way of the Bluegrass since 2004.

TORI MOLFESE is a Professor and the Ashland/Nystrand Chair in Early Childhood Education for the University of Louisville College of Education and Human Development. She received her Ph.D. in Developmental Psychology from Pennsylvania State University. She has served on many coalitions researching child development, including Kentucky's Early Childhood Development Authority.



Marion Gee, *Chair*

Budget and Finance Director
Metropolitan Sewer District

Helen Carroll, *First Vice Chair*

Manager, Community Relations
Toyota Motor Manufacturing

Peter MacDonald, *Second Vice Chair*

Ethics Committee Chair
Retired District Court Judge
Former Vice President,
United Way of the Pennyrile

Ginny Stradley, *Treasurer*

Director of Budgeting
Jefferson Community & Technical College

David Adkisson

President/CEO
Kentucky Chamber of Commerce

Mary Jo Bean

Vice President
Planning and Business Analysis
Norton Healthcare

Mary-Gwynne Dougherty

Vice President, Human Resources
Metro United Way

Doug Eberhart

President
United Way of Southern KY

Hollie Hopkins

General Counsel
Public Protection Cabinet
Commonwealth of Kentucky

Ben LaRue

Owner
LaRue Financial Advisors

Stephone Mack

Senior Account Manager
Business Development
UPS

Dana Mayton

Deputy Attorney General
Commonwealth of Kentucky

Janie Miller

Secretary
Cabinet for Health & Family Services
Commonwealth of Kentucky

Sarah Mills

Of Counsel
Stoll Keenon Ogden, PLLC

Tori Molfese

Professor & Ashland/Nystrand Chair
University of Louisville
College of Ed. & Human Development

Janie Pass

Executive Director
Heart of Kentucky United Way

David Ross

Executive Director
United Way of the Ohio Valley

Elizabeth Taylor

Director of Development & Community Relations
Community Hospice

Joseph Wind

Vice President
Government & Community Relations
Northern Kentucky University

STAFF

Terry Tolan, President & CEO
Kevin Middleton, Director of Member Services
Deby Davis, Administrative Manager

Financials



KY PROFESSIONALS COUNCIL - JUNE 2010

Statement of Financial Position

Assets	2010
Current Assets	
Cash and cash equivalents	\$306,850
Grants receivable	25,000
Accounts receivable	36,099
Pledges receivable	643,058
Total current assets	<u>1,011,007</u>
Assets whose use is limited	
Cash and cash equivalents	-----
Property and Equipment, at cost	
Equipment	48,155
Less accumulated depreciation	<u>46,561</u>
	1,594
Total Assets	<u>\$1,012,601</u>
Liabilities and Net Assets	
Current Liabilities	
Accounts payable	\$2,774
Agency payables	715,979
Deferred revenues	0
Total current liabilities	<u>718,753</u>
Net Assets	
Unrestricted:	
Undesignated	248,103
Investment in fixed assets	<u>1,594</u>
Total unrestricted net assets	249,697
Temporarily restricted:	
Total net assets	<u>44,151</u>
	<u>293,848</u>
Total Liabilities and Net Assets	<u>\$1,012,601</u>

2010 Audited Statement of Activity

Revenues, gains and other support:	Totals
Membership dues from Kentucky United Way agencies	\$147,081
Grant revenues	50,000
Misc. contributions	10,248
Administrative fees	67,727
KECC reimbursement	81,674
Interest income	3,287
Misc. income	<u>17,055</u>
Total revenues, gains and other support	<u>\$377,072</u>
Expenses:	
Brand awareness	\$27,079
Training and networking	97,493
Leveraging resources	17,626
Statewide initiatives	31,928
Board development	10,399
KECC	<u>133,243</u>
Total program services	<u>\$317,768</u>
General and administrative	<u>26,345</u>
Total expenses	<u>344,113</u>
Net increase (decrease) in total net assets	32,959
Net assets, beginning of year	<u>260,889</u>
Net assets, end of year	<u>\$293,848</u>



INCOMING BOARD CHAIR, HELEN CARROLL, HONORS
OUTGOING CHAIR AND LONG-TIME BOARD MEMBER, MARION GEE,
WITH AN AWARD FOR HIS SERVICE - NOVEMBER 2010 BOARD
MEETING, LEXINGTON

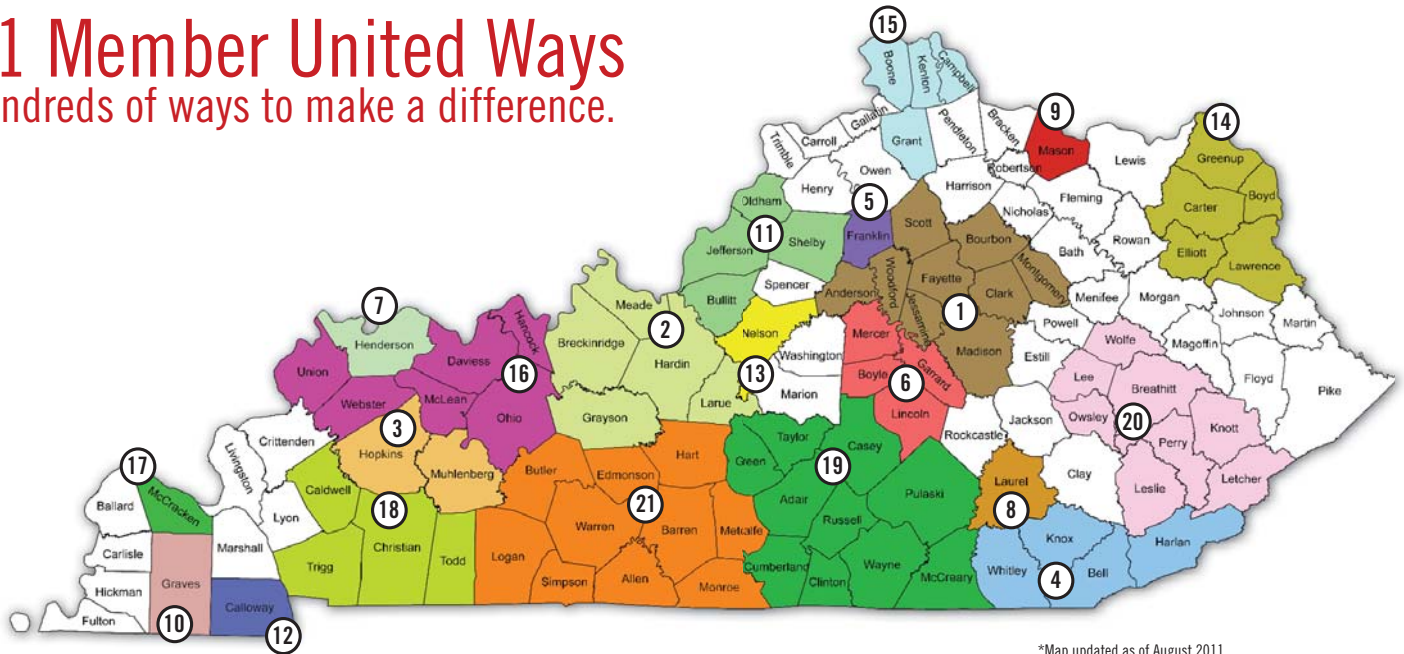
United Way
of Kentucky

United
Way



21 Member United Ways

hundreds of ways to make a difference.



*Map updated as of August 2011

1. United Way of the Bluegrass
2. United Way of Central Kentucky
3. United Way of the Coalfield
4. Cumberland Trails United Way
5. United Way of Franklin County
6. Heart of Kentucky United Way
7. United Way of Henderson County
8. United Way of Laurel County
9. United Way of Mason County
10. Mayfield-Graves County United Way
11. Metro United Way
12. United Way of Murray/Calloway County
13. United Way of Nelson County
14. United Way of Northeast Kentucky
15. United Way of Northern Kentucky
16. United Way of the Ohio Valley
17. United Way of Paducah/McCracken County
18. United Way of the Pennyryle
19. United Way of South Central Kentucky
20. United Way of Southeastern Kentucky
21. United Way of Southern Kentucky

Contact Us

UNITED WAY OF KENTUCKY
P.O. BOX 4653
334 EAST BROADWAY, SUITE 308
LOUISVILLE, KENTUCKY 40204
502.589.6897
<http://www.uwky.org>