

Heart of Kentucky  
United Way



GIVE ADVOCATE  
GIVE ADVOCATE VOLUNTEER  
VOLUNTEER  
2010 REPORT TO THE COMMUNITIES.

# A Bold Plan of Action

Together we are working to advance the common good in our communities. With your help, United Way's work centers on two distinct, but equally important, strategic goals:

**1) Helping People in Need Right Now** through a commitment to supporting 39 essential local programs; and

**2) Helping to Eliminate Future Needs** through a commitment to addressing the underlying causes of critical problems.

Our plan for Central Kentucky is bold. We lead efforts to prepare our children and youth for success in school and in life. By focusing our resources and communities on children and families, we stand to make the greatest impact possible. If we can change the future for young people, we can change the future for our communities. Efforts to provide resources for affordable health care enhances productivity and overall well-being. A continued commitment to support our aging population delivers programs stemming from all three strategic impact areas, health, education, and financial stability.

We invite you to be a part of the change. Together, united, we can inspire hope and create opportunities for a better tomorrow. That's what it means to

LIVE UNITED.

**HELPING PEOPLE IN NEED RIGHT NOW.  
ELIMINATING FUTURE NEEDS.**

The Burrus family created a home in Mercer County last year through HKUW partner, Habitat for Humanity.

2010 REPORT TO THE COMMUNITY.



# COMMUNITY

## 2009 CAMPAIGN SNAPSHOT

\$1,312,475 was raised in pledges.

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Ephraim McDowell Health and Fort Logan Hospital employees approached campaign in earnest, raising \$150,774, the largest employee investment in HKUW's campaign.

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97 companies participated in the campaign.

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Affinia employees were inspired by impact stories and company incentives to more than triple their HKUW investment from the year before pledging \$42,914.

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78 workplace campaigns were conducted.

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62 companies contributed a corporate gift representing 29.5% of the total campaign.

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2 new campaigns contributed \$4,462 in employee and corporate gifts.

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234 Leadership Circle Members who give \$1,000 or more contributed \$330,135.

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One Tocqueville Society donor contributed a gift of \$10,000.

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6 Emerging Leader Society Members.

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Employees of Red Wing Shoes implemented a workplace campaign even with knowledge jobs would be eliminated due to plant closing in six months.

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To kick off campaign, Trim Masters Foundation invested \$150,000 in HKUW creating a positive tone for seasonal giving.

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## NON PROFIT BOARD WORKSHOP

On March 24th, Danielle Clore, director of the Kentucky Nonprofit Leadership Initiative, led a fast-paced and informative discussion about the roles, responsibilities and best practices for serving on a nonprofit board of directors. The workshop is designed to complement an organization's board orientation for new members and provide a refresher for existing board members. The event, sponsored by HKUW, was well attended by Community Partners and respective board members.

## COMMUNITY IMPACT

Through community impact, Heart of Kentucky United Way strives to make a difference in the communities we serve in central Kentucky. We are increasingly more interested in addressing root causes of problems rather than 'quick fixes'.

As we move forward with Strategic Planning in 2010-2011, we will strive to impact program participants and conditions at a community level, identifying community priorities, determining with community members how problems can be addressed and implementing specific and tested strategies.

Traditional and non traditional partners will work together to reduce underlying causes of community needs and will align resources around problems and strategies. Success will be measured through outcomes that evaluate our impact on the human condition.

## TWO DAYS OF SERVICE

Changing lives reached new proportions as HKUW staff and volunteers produced and implemented two days of regional service. In keeping with United Way Worldwide's vision, Day of Caring was re-branded as Day of Action. DOC was held September 23, 2009 and Day of Action on June 23, 2010. The modification enabled staff to incorporate volunteer and campaign recognition with service.



\*Statistics reflect 2009 services and programs. In only one year, many lives were impacted.

## EDUCATION: HELPING CHILDREN, YOUTH AND ADULTS ACHIEVE THEIR POTENTIAL.

**BIG BROTHERS/BIG SISTERS** served 319 boys and girls in its school mentoring program alone, providing them with positive role models and an opportunity for caring relationships. In its community based program, BBBS provides one-on-one interaction with a carefully selected adult volunteer for children and youth ages 6-13 from single parent homes, reaching many more children. Outcomes include the children's positive self esteem, self confidence and improved school attendance and academics.

**CENTRO LATINO** served 293 children and families in the Latino communities, connecting them to existing social services, providing interpreters for medical appointments, and assisting with educational needs.

**DLDA: DANVILLE LEARNING DISABILITIES ASSOCIATION** served 30 parents in Advocacy and 241 students in their Annual Art Show. DLDA provides support and advocacy for children with learning disabilities and their families.

**4 H COUNCILS** in Boyle, Garrard, Lincoln and Mercer counties serve youth, ages 9-19, providing school clubs, leadership development, camp, a variety of special projects, and opportunities for communities service. In Boyle County a total of 2,963 were served and in Garrard 298 in camp; 944 in clubs, and 2100 in school programs. In Lincoln a total of 2,482 youth were served and in Mercer 1,295 youth were served with 142 4H leaders.

**GIRL SCOUTS** served 767 girls and young women developing high values, self esteem, leadership, and offering career education exploration.

**MERCER COUNTY ADULT EDUCATION & LEARNING CENTER** served 106 adults providing GED preparation, teaching English thru ESL (English as a Second Language), individual instruction in reading and math, including one-on-one tutor-student interaction.

**WILDERNESS TRACE CHILD DEVELOPMENT CENTER** served 59 preschool children with mental or physical disabilities, providing evaluation, special education and speech, occupational and physical therapy, and parental support. Programs include First Steps: Home Based (21) and Center Based (9) and Preschool (29).



## FINANCIAL STABILITY: PROMOTING FINANCIAL STABILITY AND INDEPENDENCE.

BGCAP SENIOR COMPANION PROGRAM served 495 senior citizens providing the homebound elderly with a senior companion to assist with transportation, light housekeeping, and respite for caregivers.

BLUEGRASS DOMESTIC VIOLENCE PROGRAM served 2,125 women and children in Outreach and 500 with Crisis Intervention. Bluegrass Domestic Violence provides advocacy for those affected by domestic violence. Safe shelters are available, as well as professional resources including counseling, education, and job skills.

BGCAP SELF-SUFFICIENCY PROGRAM provided services to 2,372 low income Mercer County residents, helping them become self-sufficient by offering money management classes, short term assistance with utility bills and rent, as well as access to job placement, education and community resources.

FAMILY SERVICES serves low-income Boyle County residents by providing short-term assistance for basic living expenses for those experiencing temporary financial difficulty. 542 clients received direct assistance; 1,286 received resources/referrals, and 10 were involved in community initiatives.

HABITAT FOR HUMANITY in Boyle and Mercer counties builds houses for qualified low-income families giving them the opportunity for first time home ownership. Sweat equity hours are required from the families who are also provided with financial counseling, budgeting, and training on home maintenance and repair. A total of 16 families were served in Boyle and Mercer counties.

LEGAL AID OF THE BLUEGRASS served 6,662 adults and 4,011 children providing high quality civil legal assistance to low income families through direct representation, education, advice and advocacy.

THE SALVATION ARMY served 16,966 individuals in their Social Services programs, providing food, shelter, clothing, and utility assistance to people in emergency situations. The Army also offers character building, educational, recreational and life skills programs for youth and adults, serving 14,121 in their Prevention/Development programs.

SPAN: SPECIAL PERSONS ADVOCACY NETWORK served 45 families, offering support for their developmentally disabled adult children, as well as respite for caregivers and opportunities for camp.

## HEALTH: IMPROVING PEOPLE'S HEALTH AND WELL-BEING.

AMERICAN RED CROSS IN CENTRAL KENTUCKY serving Boyle and Mercer counties and the DANIEL BOONE CHAPTER serving Garrard and Lincoln counties, provide disaster relief and community education for emergency awareness and serve as a liaison for military families. 100 individuals were served in Lincoln. In Boyle and Mercer counties 52 were served in AFES; 100 in Disaster Services and 2,587 in Community Services.

BGCAP MERCER COUNTY ADULT DAY served 20 individuals, providing personal care, medication supervision, medical support, nutritious meals with snacks, physical exercise, education activities, socialization and cognitive stimulation for adults with Alzheimer's or dementia, physical, mental or social impairments and adults who have special needs.

**BLUEGRASS RAPE CRISIS CENTER** provides support and information to victims of rape and/or sexual assault and their families/friends. The center also provides safety education to children and youth. 496 individuals were served in Crisis Intervention; 47 in Psychotherapy and 233 in Advocacy.

**CASA@ WOODLAWN: COURT APPOINTED SPECIAL ADVOCATES** trains and provides court appointed special advocates who represent abused, neglected children. Advocates work with children, court system and the family to decide what is best for the child. 48 children were served in Boyle and Mercer counties.

**HERITAGE HOSPICE: TRANSITIONS** served 72 individuals offering information, referral assistance, encouragement and support through case management and volunteer services.

**HOPE CLINIC & PHARMACY** served 186 individuals in more than 9 counties, providing access to health care services for the uninsured and low income population with chronic diseases.

**KIDNEY HEALTH ALLIANCE OF KENTUCKY** served 676 individuals providing patient services, nutritional supplements, education and support for families to improve their quality of life. The Alliance also seeks solutions to kidney disease through education and research. 676 received direct patient services; 2198 were reached through public education.

**NURSING HOME OMBUDSMAN OF THE BLUEGRASS** served 1,334 individuals as advocates for nursing home residents and their families to address concerns, assert legal rights, maintain dignity and ensure the best possible professional and personal care.

**RECOVERY CENTER** served 343 individuals providing individual and family outpatient treatment for drug abuse/dependence and domestic violence.

**REGAIN** provides a community-based outpatient program that promotes cardiac health, education and rehabilitation to uninsured recovering cardiac patients. 70 patients were served in Phase 2 and 32 in Phase 3 of Cardiac Rehab.

**SANDERS CRISIS STABILIZATION CENTER** served 136 children and youth providing short-term, emergency housing, as well as counseling for them and their families.

**SENIOR CITIZENS CENTERS** in Boyle, Lincoln, and Mercer Counties provide homecare and personal services, including meals, transportation, wellness care, and recreation, socialization, and referral services. In Boyle, 2,578 were served in Title III; 27 in Adult Day Care and 88 in Home Care. In Lincoln, 628 were served in Title III and 61 in Home Care. In Mercer, 1,850 were served in Title III with 440 in Home Care and a total of 1031 meals.

**WILDERNESS TRACE YMCA** served 4,388 youth and families through programs to promote and develop wholesome lifestyles for youth and adults.

# FINANCIAL STABILITY

## Volunteer Income Tax Assistance

### Program Overview

Free tax return preparation for qualifying low-income households  
Volunteer-driven  
Local organizations provide space, technology and volunteers  
Use opportunity to develop/market other financial stability products and services  
Open end of January through April 15  
Training supplied by CKEEP (Central KY Economic Empowerment Project)

### 2010 Goals

Learn how to operate sites, file returns and  
50 returns per site  
Increase number of working individuals receiving EITC  
Venture into Community Impact work (Health, Education, Financial Stability)

### Extraordinary Volunteers!

4 site managers (PBK Bank, Farmers National Bank, HKUW)  
5 volunteer tax preparers (Corning, Ephraim, Boyle Community Education)  
8 -12 hours of classroom training, homework/practice, certification  
Each site operated 8 hours per week, 320 hours total

### Sites Managers

Mae Renner, PBK Bank  
Brian Duncan, PBK Bank  
Roger Miller, Farmers National Bank  
Liz Cook, Heart of KY United Way  
Tyler Young, Corning

### Volunteer Tax Preparers

Cliff Ross, Corning  
Lana Smith, Ephraim McDowell Health  
Sueticia Sutton, Boyle Co Community Ed  
Randy Miller, Corning

### 2010 Results

4 site managers (PBK Bank, Farmers National Bank, HKUW)  
Services offered at sites in Lincoln, Garrard, Boyle and Mercer counties  
Completed 197 returns  
Total refunds equaled \$315,388  
Total EITC equaled \$170,252  
54% of refund was Earned Income Tax Credits  
Average Earned Income Tax Credit was \$1,306  
Average household income of households served was \$15,573

**“True individual freedom cannot exist without economic security and independence.”**

*- Franklin D. Roosevelt*

**HEART OF KENTUCKY UNITED WAY**  
**Statement of Condition**  
June 30, 2010

**ASSETS**

<b>Current Assets:</b>	
Restricted Cash	\$ 248,412.73
Unrestricted Cash	230,963.77
Endowment Account	567,393.66
Net Pledges Receivable	<u>370,893.72</u>
Total Current Assets	1,417,663.88
<b>Fixed Assets:</b>	
Building/Equipment	220,506.84
Other Assets:	<u>4,233.63</u>
<b>TOTAL ASSETS:</b>	<b>\$ <u>1,642,404.35</u></b>

**LIABILITIES AND NET ASSETS**

<b>Current Liabilities:</b>	
Accounts Payable	\$ 2,114.05
Agencies Payable	396,770.84
Payroll Liabilities	52,236.03
Other Current Liabilities	<u>17,784.64</u>
Total Current Liabilities	468,905.56
<b>Long Term Liabilities:</b>	
Agencies Payable	239,905.00
Other-Retirement Payable	<u>9,940.86</u>
Total Long Term Liabilities	249,845.86
Net Assets	219,146.91
Retained Earnings	550,923.15
Net Income	<u>153,582.87</u>
<b>Total Liabilities &amp; Net Assets</b>	<b>\$ <u>1,642,404.35</u></b>

HEART OF KENTUCKY UNITED WAY  
Statement of Activities  
July 1, 2009 through June 30, 2010

REVENUE

Restricted Revenue	\$ 26,055.96
Pledge Revenue	1,311,475.07
Less Shrinkage	<u>(83,799.54)</u>
Net Pledge Revenue	1,227,675.53
Interest Income	8,399.57
Unrealized Market Gain	63,475.97
Realized Gain/(Loss) on Sale of Assets	<u>(248.52)</u>
Total REVENUE	\$ 1,261,882.54

EXPENSE

Program Services	\$ 947,713.91
Fund Raising Expense	113,167.78
General/Administrative Expense	<u>110,893.95</u>
Total Expense	<u>1,171,775.64</u>
Change in Net Assets	<u>\$ 71,627.02</u>

# BOARD MEMBERS

## **FYE 2010 Executive Committee**

**2009 Campaign Chair**  
**President**  
**Vice President**  
**Treasurer**  
**Secretary**

**John Winkler**  
**John Trisler**  
**Joye Hunt**  
**John Rodes**  
**Janie Pass**

**Philips Lighting**  
**Community at Large**  
**PBK Bank**  
**Kerbaugh and Rodes**  
**Heart of Kentucky United Way**

## **FYE 2010**

Linda Dye  
David Martin  
Kathy Miles

Caregivers by Linda, LLC  
Community at Large  
Centre College

Jo Ann Rice  
John Rodes

Symbiotix Inc.  
Kerbaugh & Rodes, CPA

John Trisler  
John Winkler

Community at Large  
Philips Lighting

## **FYE 2011**

Mike Angolia  
J.H. Atkins  
Kim Frazier  
Mike Jackson  
Angela LaMere  
Shay Pendygraft  
Alan Turbyfill

Corning, Inc.  
Centre College  
Women's Care for the Commonwealth  
Fort Logan Hospital/EMH  
Caterpillar Track Components  
First Southern National Bank  
Kentucky Trust

## **FYE 2012**

Melanie Clark  
Carmen Coleman  
Joye Hunt  
Dale Kihlman  
Vince Pennington  
Aaron Rowland  
Scott Schurz

Clark Law Office  
Danville Schools  
PBK Bank  
Community at Large  
Sheehan, Barnett, Dean, Pennington & Little PSC  
Heartland Veterinary Hospital  
The Advocate Messenger

# Heart of Kentucky United Way Staff

Janie Pass, Executive Director  
Jane Boyd, Community Investments  
Liz Cook, Resource Development  
LeeAnne McCann, Finance  
Libby Suttles, Marketing

## HEART OF KENTUCKY UNITED WAY

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### Mercer Office

513 Legion Drive, PO Box 234  
Harrodsburg, KY 40330

### Lincoln Office

305 East Main Street  
Stanford, KY 40484

Website: [www.hkuw.org](http://www.hkuw.org)

Facebook.com/hkunitedway

Twitter.com/hkunitedway



# THANK YOU.

Your support of Heart of Kentucky United Way is critical to making sure that people in need right now can find help. Together we also look to find solutions to our community's most pressing issues. By tackling these root causes head on, we truly can eliminate future needs for so many by positively impacting school readiness of our children, access to healthcare for the underinsured, and enhanced financial stability of individuals and families throughout Central Kentucky.

None of this important work is possible without the support of you and your neighbors throughout our communities. On behalf of the local programs that you support, as well as the individuals, families and neighborhoods that you help through your generosity, thank you.

Thank you for caring. Thank you for sharing.  
Thank you for making the choice to

## LIVE UNITED.