

GIVE. ADVOCATE. VOLUNTEER.

KINDERGARTEN
READINESS

IMPACT

resources

ENGAGE CHANGE

EARLY LEARNING

partner

IMAGINE

FINANCIAL
STABILITY

TEAM

COMMUNITY

LIVE UNITED

Grow

AFTER SCHOOL

Volunteer

OUT-OF-SCHOOL

EXPLORE

PASSION

together

SUPPORT

DREAM

Learn

GIVE Healthy Lives

CLASSROOM

FAMILY HOME

HIGH SCHOOL GRADUATION

Advocate

SHAPING THE FUTURE

2015 Annual Report



CHANGING THE ODDS

SHAPING THE FUTURE

Real change occurs from the bottom up; it occurs person to person, and it almost always occurs in small groups and locales and then bubbles up and aggregates to larger vectors of change.

- Paul Hawken

collaborate
for results

UNITED WAY
OF SOUTHERN KENTUCKY
**COMMUNITY
IMPACT**

invest
in initiatives

identify
the issues

BUSINESS & INDUSTRY • COMMUNITY • EDUCATORS • GOVERNMENT • DONORS • HEALTH & HUMAN SERVICES

OUR MISSION

To be the leader in bringing together the resources to build a stronger, more caring community.

SHAPING THE FUTURE

Dear Supporters,

It has been an honor and privilege to serve as Chairman of the United Way of Southern Kentucky Board of Directors in 2015. My year has offered me a unique opportunity to see firsthand the countless hours that our volunteers have spent helping to transform our organization to implement our new Community Impact work. I am truly inspired by the dedicated staff and volunteers who tirelessly give of their time, talents and financial resources to help make our communities a better place to live, work and play.

I hope the information in this report makes you proud of our accomplishments and inspires you to believe that there is so much more we can do if we all work together and LIVE UNITED! There are so many needs in our communities that it can be overwhelming at times to decide what needs to be tackled first. Our Community Impact work has given us a focus like never before. Our goal is to stop being the band-aid by treating the symptoms of poverty, abuse and addiction and focus our efforts to begin working on the root causes of these issues. This won't happen overnight and it will mean a change in how we operate, but I couldn't be more excited about our future.



Thank you for the privilege of serving you this past year. I have been passionate about the work of United Way for many years but my excitement for our new efforts can't be contained. On behalf of the Board of Directors, thank you for all you do every day to Give, Advocate and Volunteer. With all of us working together we can accomplish our vision of a Southern Kentucky where all residents are educated, healthy, and financially stable.

Kindest Regards,
Ann Puckett
2015 Chairman of the Board

2015 Board of Directors:

Chairman of the Board: Ann Puckett, BKD LLP

Chairman-Elect: Brad Odil, WBKO

Treasurer: Steve Thurmond, Franklin-Simpson Chamber of Commerce

Immediate Past Chairman: Joe Tinius, Retired

Kenly Ames, English Lucas Priest & Owsley, LLP

Ron Barbe, Ventra Plastics

Craig Browning, U.S. Bank

Ken Campbell, Ventra Plastics

Rob Clayton, Warren County Public Schools

Thad Connally III, First Choice Home Medical

Chad Cooper, Allen County Board of Education

Mark Cornwell, Canteen

Mike Grubbs, City of Bowling Green

Donna Harmon, Trace Die Cast

Sherry Howell, Fruit of the Loom

Stacey Hughes, Logan Aluminum

Nickie Jones, Agency Rep.-Family Enrichment Center

Mark Langevin, U.S. Bank

Anne Leonard, Tristar Greenview Regional Hospital

Mike Sherrod, Tristar Greenview Regional Hospital

Dewayne McDonald, Warren RECC

Clinton Mills, Hitcents

Mike O'Kelly, First Security Bank

Tad Pardue, Bell Orr Ayers & Moore

Blake Richey, Bowling Green Realty, Inc.

Nora Roper, GM-Bowling Green Corvette Assembly

Steve Sinclair, Graves Gilbert Clinic

Todd Stewart, Western Kentucky University

Katie Strednak Singer, Franklin Presbyterian Church

Scott Taylor, Western Kentucky University

Tamara Vogler, BB&T

Terri Wiethorn, Fruit of the Loom

2015 Staff:

Steve Wallace, President & CEO

Debbie Hills, Chief Operating Officer

Ellie Harbaugh, Sr. Director of Resource Development

Mandy Hicks, Director of Marketing & Communications

Beth Stroud, Director of Community Impact

Beth Wells, Director of Community Impact

Susan Simmons, Director of Finance

Sheila Simmons, Director of Administration

Stacie Lee, Donor Relations Manager

Keshia Ingram, Donor Relations Manager

Shawn Kloeber, Administrative Assistant

OUR VISION

A Southern Kentucky where all residents are educated, healthy, and financially stable.



United Way of Southern Kentucky committed to a Community Impact transformation in December 2012, a new way of doing business for United Way with a focus on long term change in our community. As a result of extensive community research conducted throughout 2013-14, United Way created a report of the findings in early 2015 titled: *Voices for the Common Good: Southern Kentucky Speaks Out*, which can be downloaded at uwsk.org. Upon sharing the report, which highlights the most important issues as defined by the community research, four committees were formed around the issues of Education, Income, Health, and Safety Net. These committees then formed the strategies and Big Bold Goals to guide the future of United Way's work in 2015 and beyond.



EDUCATION

Prepare children, youth & young adults to succeed in school and life (cradle to career)

Priority Focus Area: Kindergarten Readiness

Children start school at levels of physical, social-emotional and intellectual development needed for school success.

BIG BOLD

GOAL INCREASE BRADD AREA KINDERGARTEN READINESS SCORES FROM 49.4% TO 75% BY 2020.

Priority Focus Area: College & Career Readiness

Students graduate high school prepared for college or other post-secondary training, work and life.

BIG BOLD

GOAL INCREASE BRADD AREA COLLEGE & CAREER READINESS SCORES FROM 65% TO 80% BY 2020.



INCOME

People have the appropriate skills to maintain a living wage employment.

Priority Focus Area: Workforce Development

Individuals have the training and skills needed to obtain and maintain family-sustaining employment.



HEALTH

Increase access to quality, affordable health and crisis intervention services.

Priority Focus Area: Access to Affordable Health Care

Individuals have access to affordable, preventative, physical, mental, dental and other needed care critical to good health.

Priority Focus Area: Safe Home and Community

People are safe from violence, crime, emotional and physical abuse.



SAFETY NET

Basic needs are met in a timely manner through a coordinated system of resources.

Priority Focus Area: Access to Basic Needs

Basic needs of food, clothing, and safe and affordable housing are met.

Priority Focus Area: Transportation

Multiple options for safe and reliable transportation are available.



One of the findings of the community research conducted is that there exists major issues related to knowing where and how to get help. Therefore, in 2015 United Way of Southern Kentucky announced that they will be working to implement a local 2-1-1 system in the 10 county BRADD region. Similar to 911, 2-1-1 is an easy to remember three-digit telephone number assigned by the Federal Communications Commission for the purpose of providing quick and easy access to information about health and human services. Professional Information and Referral Specialists work with callers to assess their needs, determine their options and provide appropriate programs/services, give support, intervene in crisis situations and advocate for the caller as needed.

2-1-1 is currently available to 93.4% of residents in the United States and will be made available to all residents in the 10-county BRADD region in 2016.

In October 2015, United Way of Southern Kentucky asked that organizations with programs impacting these issues submit a Letter of Intent as the first step in the application process for funding. 83 Letters of Intent were submitted and 54 were asked to continue forward with the application process. Organizations with programs seeking funding will be notified in June 2016 of funding levels upon completion of the application process.

LOOKING AHEAD

In 2016 and beyond, United Way will continue to focus its efforts on strategies in Education, Income, Health, and Safety Net in order to make the greatest impact in the community. United Way will also continue to rely on and grow powerful partnerships in order to encourage collaboration, fortify programs and maintain our commitment to excellence. United Way will work with many organizations to leverage and unite resources, align agendas, and broker new collaborations to deliver the best possible services to our community.

VOLUNTEER/SPECIAL PROGRAMS

SHAPING THE FUTURE

VOLUNTEER

Day of Caring: July 29, 2015

The United Way Day of Caring is one day that asks businesses to make a commitment to offer their employees a chance to “step away from their desks” to provide hands-on, volunteer labor for a variety of projects. In 2015, more than 1,200 volunteers representing 80 companies completed more than 80 projects impacting Education, Income, Health, and Safety Net issues.



Feed The Need: Spring 2015

United Way brought together more than 90 companies and organizations to collect more than 65,000 items in support of local food banks as part of the 2015 Feed the Need Food Drive. Since its inception in 2009, more than 370,000 items have been collected.



TOTAL VOLUNTEERS: 2,502 **VALUE OF TIME: \$144,302**



Dolly Parton Imagination Library

To assist in getting books in the hands of children, United Way of Southern Kentucky adopted the Dolly Parton Imagination Library in 2011. Any child, from birth to the age of 5, can enroll in the program. Once enrolled, the child will receive one age appropriate book every month in the mail until their fifth birthday.



Number of Children Beginning Enrollment in 2015: 1,479

Total Number of Books Mailed in 2015: 31,009

Number of Children who Graduated in 2015: 666

2015 Imagination Library Supporters: American Legion Post 65 • Baugh Insurance • Bowling Green Junior Women's Club • Cook Downing & Underwood • DPIL Tompkinsville • Faculty & Staff of McNeil Elementary • Fruit of the Loom • Glasgow Auto & Tire • Hart County Chamber of Commerce • Laura Turner Dugas Fund for Allen County • People's Bank • RBG Foundation • Scott Waste • UAW-General Motors Corvette Assembly • Many generous individuals

2015 Adoptions: The Browning Family: Edmonson County Head Start • DART Foundation: Hart County Head Start • The Stacey Johnson & Stefan R. Hughes Family: Austin Tracy Elementary Preschool Program • Wendy's of Bowling Green: Wee Care Nursery

STUDENT UNITED WAY

 **Western Kentucky University**
WKU Student United Way

30 Members **ACTIVITIES INCLUDED:** Service event at Boys & Girls Club of BG (Feb 15) • Participation in “Feed the Need” (Mar 15) • \$1,000 grant made to The Salvation Army (Apr 15) • Recruitment event (Aug 15) • Service event at U.S. Bank's Balloons, Tunes & BBQ (Sept 15) • Service event at BRASS (Oct 15) • Meal Night fundraising events (Oct 15) • Service event at Boys & Girls Club of BG (Nov 15) • Cornhole Tournament fundraising event (Nov 15)



Bowling Green High School
Student United Way

45 Members **Established: May 4, 2015** **ACTIVITIES INCLUDED:** Established by-laws • Established Board of Directors • Service event with Day of Caring at Bowling Green Christian Academy • Service event with Trunk or Treat at The Foundry • Service event at U.S. Bank's Balloons, Tunes & BBQ • Service event with Christmas workshop at Dishman McGinnis Elementary

Whether a small business, major corporation or even a nonprofit, these organizations provide the opportunity for thousands of employees to experience the satisfaction of seeing their donations create impact on people's lives.

14/15 Campaign: 9,138 donors • \$2,001,137 • 122 campaigns

TOP 50

- | | |
|--|---|
| 1 Fruit of the Loom | 26 Franklin Precision Industries |
| 2 Logan Aluminum | 27 BB&T - Bowling Green |
| 3 UAW - GM Corvette Assembly | 28 Allen County Schools |
| 4 U.S. Bank - Area Wide | 29 Bowling Green Independent Schools |
| 5 Trace Die Cast, Inc. | 30 Van Meter Insurance |
| 6 Western Kentucky University | 31 Atmos Energy |
| 7 Hill's Pet Nutrition | 32 Halton Group of Americas |
| 8 Warren RECC - Area Wide | 33 Meijer |
| 9 J. M. Smucker Company | 34 Martin Automotive Group |
| 10 Warren County Public Schools | 35 Sumitomo Electric Wiring Systems, Inc. |
| 11 Dixie - Georgia Pacific | 36 Bendix Spicer |
| 12 Tristar Greenview Regional Hospital | 37 English Lucas Priest & Owsley LLP |
| 13 R. R. Donnelley & Sons Company | 38 The Stupp Bridge Company |
| 14 City of Bowling Green | 39 Berry Plastics |
| 15 Bowling Green Metalforming | 40 Hilliard Lyons |
| 16 Emerson Electric | 41 Macy's |
| 17 Ventra Plastics | 42 CGS Machine & Tool Inc. |
| 18 Country Oven Bakery | 43 AT&T |
| 19 BKD LLP | 44 NHK of America Suspension Components |
| 20 Lord Corporation | 45 Housing Authority of Bowling Green |
| 21 Warren County Water District | 46 3A Composites USA |
| 22 United Parcel Service | 47 Kentucky Legal Aid, Inc. |
| 23 Bowling Green Municipal Utilities | 48 Charles Moore Insurance Agency |
| 24 Dollar General Corporation | 49 Jim Johnson Auto Group |
| 25 Citizens First Bank - Area Wide | 50 Stoodly Company |

SPECIAL EVENTS:

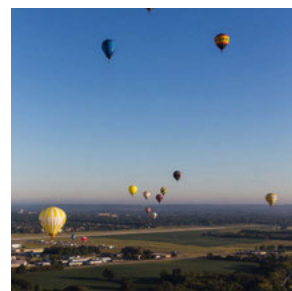
ERIE INSURANCE RADIOTHON on 95.1 WGGC: May 7, 2015

HANDBAGS FOR HOPE PRESENTED BY CHARLES M. MOORE INSURANCE: June 11, 2015

CHANNEY'S DAIRY DASH: June 18, 2015

U.S. BANK BALLOONS, TUNES & BBQ: September 10-13, 2015

WKU'S LIVE UNITED WHITE OUT SPONSORED BY U.S. BANK: September 26, 2015



Alexis De Tocqueville Society \$10,000+

Alexis de Tocqueville was a French philosopher and philanthropist who traveled America in 1831. His journals record his thoughts on democracy and his observations about the remarkable commitment Americans make to the improvement of their communities. The name Tocqueville Society was chosen in honor of his admiration for the spirit of voluntary association and effort toward its advancement. United Way of Southern Kentucky's Tocqueville Society is composed of philanthropists who contribute an annual gift of \$10,000 or more to United Way with this same commitment to improving our community that has built the foundation of our country:

Troy & Ann Puckett
Laura Goad Turner Charitable Foundation

CHAIRMAN'S SOCIETY \$5,000 - \$9,999

A major gift today can literally change the lives of hundreds – even thousands – of vulnerable children, families and seniors in our community. And as those lives are changed, so too are the lives around them, creating a ripple effect that will be felt throughout Southern Kentucky. These community leaders and philanthropists are investors who want to create impact with their significant contributions that will result in concrete and measurable changes.

- JIM & EVA MARTENS
- VINCE & KATHLEEN BERTA
- ROCKY & PAT PRICE
- PETE & DIXIE MAHURIN

NO ONE
IS MORE CHERISHED IN
THIS WORLD THAN
SOMEONE WHO
LIGHTENS THE
BURDEN OF
ANOTHER

-Unknown



LEADERSHIP CIRCLE

SHAPING THE FUTURE

When a group of caring and strong people come together to rally behind a common goal, great things happen. By partnering with the United Way, Leadership Circle donors preserve the wellbeing of our community.

Participation in the Leadership Circle is an indication of a deeper involvement and a resolve to do more. Leadership Circle donors are compassionate people committed to achieving results and making a positive difference in people's lives. They lead the way by their commitment and integrity, and their willingness to make a powerful statement about their desire to care for and strengthen their community.

Members of the Leadership Circle lead the way toward building a stronger, healthier community through individual and combined spousal gifts of \$1,000 or more. Our Leaders show by example:



VISIONARY SOCIETY \$2,000- \$4,999

Anonymous
Charles Adams
Tommy Adams
Cara & John Benningfield
Craig & Deborah Browning
Lis Cravens
Brent & Kathy Fackler
George & Pam Fields
Tom & Joanne Gilliam
Norman E. & Carole B. Harned
Debbie Hills
Harvey & Sarah Johnston

Ryan & Dana Leisey
David & Susan Lyng
Dale & Carol Miller
Suzanne Ogawa
Randy Schumaker
Kathryn Stewart
Anna Swierkosz
Dana & Melissa Taylor
Alan & Michelle Taylor
Christian L. & Anne M. Volkert
David & Fleur Whitaker

Trent Forshee
Lucille Gartman
Dudley Gentry
Jimmy Giles
Stan Gish
Linda Green
Bill & Carol Greer
Scott Gregory
John & Barbara Grider
Gary Grohovsky
Mike Grubbs
Joe & Ellie Harbaugh
Tommy Hardcastle
Spike & Donna Harmon
Karl & Linda Harnack
Altricia C. Harrell
David & Jeana Harrer
James Harris
Mark Hartman
Roger D. Haycraft
Mandy Hicks
Bill & Angie Hines
Kyle Hines
Nathan Holaday
Barry Howard
Stacey Hughes
John K. Humkey
Jeffrey L. Hunt
Sharon E. Hunter
Frank Iannuzzi
Mac Jefferson
Bud Jones
Chris & Cindy Krebs

Sharon Kreke
David & Trellice Krupa
Owen Lambert
Mark & Toni Langevin
Stan Layne
John & Stacie Lee
Anne Leonard
Roger Longest
Maria Lopez-Torres
Tracey T. Madison
Steve & Alecia Marcum
Debi Maulden
Craig & Debbie McCormick
Dewayne McDonald
Steve J. McDonald
Rick & Jane Medlin
Mark T. Mitchell
Jeff Mullins
Matthew Murphy
Dena & Robert Nelsen
Steve Newberry
Bill Newton
Brent & Sue Ann Norris
Brad Odil
Michael T. O'Kelly
Lettie Oldham
William Osborne
Cathy, Alan & Chris Palmer
Tad & Jennifer Pardue
William Parrish
Cletus & Donna Payne
Jannell Pedigo
Tony & Jayne Pelaski

Ken Perdue
Chris Phillips
Lawrence Pike III
Cathy Pillow
Gary & Julie Ransdell
Blake Richey
Bill & Melinda Riedel
Melyssa Roberts
Mark & Lesli Rohrig
Nora Roper
Brent & Sandy Sealey
Michael & Julia Seiler
Brian Sewell
Mike Sherrod
Fred & Christine Siegle
Kevin Simpson
Steve Sinclair
Bruce Smith
Carl Smith
Tonda Spencer
Col. Robert & Cora Jane Spiller
Gary Sprinkle
Doug Squeglia
W. Drew Stahlman
Cheryl Stevens
Barbara Stewart
Todd M. Stewart
Paul Sullivan

Scott & Krissy Taylor
David L. Thomas
Kim M. Thomas
Steve & Brenda Thurmond
Joe & Katy Tinius
Justin Todd
Stephen Trussell
Bill Tucker
Barbara E. Veith
Bryan Vice
Shannon Vitale
Ken & Tamara Vogler
Eric & Drue Walker
John & Theresa Wells
Curtis Whistle
Lanny White
Debra Wiesenberger
Terri Wiethorn
Rick & Teresa Wilson
Darren & Melissa Woodruff
Zak Wren
John Yonts

IMPACT SOCIETY \$1,000- \$1,999

Anonymous
Steve Allen
Jon Andrews
Cameron & Teresa Bailey
Howard Bailey
Ron & Shelley Barbe
David A. Barker
David & Michele Bell
Darrell Bellar
John Berry
Jeff Blodgett
Kathy Board
Charles Brabham
Dan & Sandy Brown
Ken & Melissa Campbell

Patrick Carter
Christopher Champion
Nicholas Choate
Danny J. Coffey
Thad F. Connally III
Scott & Tricia Crocker
Joe Davis
Robert Davis
Thomas L. Dooley
Steven & Claudia Downey
Kenneth & Kathleen Duvall
Jeanene Edwards
Gary & Barb Ellis
Ricky & Amy Ferrell
Thomas & ZoAnn Flynn

FINANCIAL ACCOUNTABILITY

SHAPING THE FUTURE

United Way of Southern Kentucky takes our role as a trusted community leader very seriously. As a result, we have a long tradition of adhering to very high standards of accountability and transparency. As part of our this commitment to these standards, our annual audits and IRS Form 990s for the current reporting term and last five years are available on our website at uwsk.org.

United Way of Southern Kentucky, Inc. Statement of Financial Position

As of June 30, 2015

Assets

	UNRESTRICTED	TEMPORARILY RESTRICTED	TOTAL
Cash and Cash Equivalents	\$94,154	\$132,478	\$226,632
Investments	\$1,362,626	-	\$1,362,626
2014/2015 Contributions Receivable, less allowance for uncollectibles of \$145,235	\$814,822	\$485	\$815,307
2013/2014 Contributions Receivable, less allowance for uncollectibles of \$153,692		-	
Other Receivables	\$13,157	-	\$13,157
Prepaid Expenses	\$19,102	-	\$19,102
Land, Building and Equipment, net	\$243,697	-	\$243,697
TOTAL ASSETS	\$2,547,558	\$132,963	\$2,680,521

Liabilities and Net Assets

Liabilities			
Accounts Payable	\$15,778	-	\$15,778
Accrued Expenses	\$50,451	-	\$50,451
Allocations Payable	\$1,041,978	-	\$1,041,978
Designations payable, net of allowance for uncollectibles of \$18,628	\$164,000	-	\$164,000
TOTAL LIABILITIES	\$1,272,207	-	\$1,272,207
Net Assets			
Unrestricted			
Operating	\$1,248,491	-	\$1,248,491
Endowment fund - Board Designated	\$26,860	-	\$26,860
Temporarily Restricted	-	\$132,963	\$132,963
TOTAL NET ASSETS	\$1,275,351	\$132,963	\$1,408,314
TOTAL LIABILITIES AND NET ASSETS	\$2,547,558	\$132,963	\$2,680,521

REVENUE: \$1,963,495

- 1) Campaign: \$1,728,066
- 2) Early Childhood Education contributions: \$83,611
- 3) Endowment: \$3,000
- 4) Special Events: \$26,065
- 5) Other Revenue: \$122,753

EXPENDITURES: \$2,061,454

PROGRAM SERVICES: \$1,362,028 (66%)

- 1) Fund Distribution: \$1,072,832 (53%)
United Way impacts critical issues led by community volunteers.

- 2) Community Capacity Building: \$187,914 (9%)
United Way invests in continuous learning and support for the community that aids in the identification and resolution of community problems that impact quality of life and ensures that programs are meeting the most critical needs.

- 3) Early Childhood Education: \$98,535 (5%)

- 4) Volunteer Program: \$2,747 (>1%)

SUPPORTING SERVICES: \$699,426 (34%)

- 5) Management and General: \$381,612 (19%)

Includes investments in infrastructure and operations.

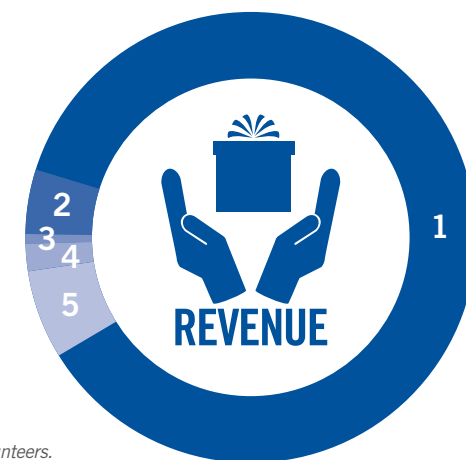
- 6) Fundraising: \$249,179 (12%)

Fundraising expenses include any costs incurred in the process of or with the intent of asking potential donors to contribute funds, materials, or time. This investment saves fundraising overhead expenses for numerous nonprofits. The Better Business Bureau states that a charity should spend no more than 35% of related contributions on fundraising.

- 7) Marketing: \$50,839 (2%)

- 8) UWW Dues: \$17,796 (>1%)

United Way's 990 tax form and annual audit are available for review at uwsk.org/who-we-are/financial-accountability



UNITED WAY



“NEVER DOUBT THAT A SMALL GROUP
OF THOUGHTFUL COMMITTED CITIZENS
**CAN CHANGE
THE WORLD.**”
MARGARET MEAD (1901-1978)





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LIVEUNITEDToday.com