

## **Report to the Board of Directors for United Way of Central Virginia 2012/2013**

The 2013 year was yet another exciting and challenging year for the United Way of Central Virginia. It was a year that the Central Virginia Community pulled together to help meet the ever increasing needs.

Back by popular demand, we kicked off our 2013/2014 campaign with the Feeeenomonal Follies. Marcia Thom did another outstanding job of transforming community individuals into artists who really had a wonderful time meeting and entertaining others for the good of UWCV.

Our 2012 "***Opening Doors...Changing Lives***" Campaign, chaired again by Frances and Don Giles, was another huge success.

In April, The Giles announced that the United Way Campaign had met its \$3.5 million goal. This was achieved in part by an \$188,763 gift from the Estate of a loyal donor Sam Williams and two challenge grants - one for \$100,000 from Southern Air, Centra, Liberty and Banker Steel and the second a \$25,000 challenge by Frances and Don Giles.

The 2012 Campaign saw 289 corporate, business, and agency partners; 17 new corporate gifts, and 2,355 new individual gifts.

Leadership giving continued to drive campaign success and represented 45% of total campaign dollars. Of these donors, 23 were Tocqueville Society philanthropists who generously donated \$10,000 or more.

### **2013 Campaign successes/activity to date:**

- **Dr. Hurt, 2013 Campaign Chair, kicked off the campaign with a personal donation of \$20,000.**
- Conducted more than 100 Campaign Presentations and Agency Fairs.
- Provided training to more than 40 Employee Campaign Managers.
- Hosted a ***Leadership Giving Society*** Reception in November. The \$5,000 sponsorship for this event was generously provided by Nationwide.
- Sent Individual Campaign Cabinet sector mailers to donor/prospects for sectors: Healthcare, Investment, Insurance, Banks, Commercial/Service, Clergy/Churches.
- Recruited Young Leaders Society members and conducted 250 calls to prospective residential donors.
- Mailed 50,000 campaign kick-off letters in September using a screened/qualified Polk directory of residents in our service area. Two multi-page, full color, 8 ½ x 11" newsletters were mailed in October (45,000 pieces) and November (40,000 pieces). Each mailer included a remittance envelope. All three mailers were generously donated by Progress Printing.
- Coordinated a staff "Thank You Call-A-Thon" and conducted more than 500 individual thank you calls/note cards.
- Reestablished a Thank You program for the 2013 campaign. Each week a thank you note, signed by Marie, is sent to all residential and workplace campaign donors.

- Completed more than 25 personal visits with company CEOs prior to campaign kickoff in September.
- Successfully coordinated the Commonwealth of Virginia Campaign as well as the Combined Federal Campaign with qualifying partner agencies.
- Submitted grants to the following:
  - Bank of America Charitable Foundation
  - Dominion Virginia Power Foundation
  - The Timken Company
  - Wells Fargo Foundation

## **Community Impact**

In June Joan Phelps was elected President of AIRS ( Alliance Of Information and Referral Systems).

Distributed \$2,131,314 to programs of Partner Agencies. Donor Designations and Impact designations were distributed to agencies.

Second Community-wide “Conversation on Hunger” was held in October 2013. The steering committee has continued to meet during the year and new partnerships are being developed in the counties. We are exploring the possibility of a centralized database to help prevent individuals from moving from one food pantry to another.

Women’s Leadership Council embarked on an exciting new project. The WLC approved funding for Smart Beginnings in the amount of \$32,141 to improve School Readiness through High Quality Preschool and Childcare Accessibility and Family Education. This funding will support a mobile literacy bus, The Incredible Years and Virginia Star Quality Initiative including training for staff in childcare centers.

Smart Beginnings has been busy: 3,800 children were read to on Read for the Record day in each of our jurisdictions; three-day training for The Incredible Years Parent Education; 23 people completed the training to lead parent groups; held an Annual Early Childhood Education Conference with 75 preschool/childcare teachers and staff attending; launched a partnership with College Hill Properties for the literacy bus.

2-1-1 Resource Specialists answered 26,951 calls and gave over 55,802 referrals in 2013. 2-1-1 Center assumed the responsibility for maintaining the 2-1-1 Statewide Database.

Neighbor to Neighbor (Appalachian Power Program) provided \$6,950 in assistance.

Energy Share (Dominion Power) provided in \$38,541 assistance.

Financial Assistance through an anonymous donor provided \$14,367 in assistance.

Distributed \$105,060 worth of resources to agencies through the Gifts in Kind program.

## **Marketing Department**

WSET: over 530 times in 6 months (commercials/PSA's)

WDBJ: 3 news stories

Comcast: online website and PSA (our campaign commercials)

News & Advance: there was an issue with archiving this year but per the online archives, we had approximately 15-20 stories about UWCV and mentions through many more stories of our partner agencies

Commercial for \$1, \$5 and \$10 donations was generously filmed by Randolph College's Skip Wallace as a donation. The commercials are used in: 30 PSAs on local television stations and as a collection as our campaign video that we use at workplace presentations.

KHF 93.7-For the second year, KHF held their weekly "Way Wednesday" segment where UWCV and its partner agencies could come on and share what they were doing with the listening audience. We were on over 40 times on the Morning Show along with agencies, and we had various commercials played throughout the year at no cost (Bowling, Zombie Run, Lynchburg Cooks, Thank you ads, etc.)

Social Media/Facebook: We currently have 328 likes, an increase of approximately 150 in the year.

Highest post reached 545-The freeze mob at Get! Downtown

Highest event reached 1,183-Run for Your Life Zombie Run

Demographics: 32% are ages 25-34, 21% are ages 35-44, and 17% are ages 45-54

Constant Contact: We currently have 8,731 subscribers. In 2013, we sent nearly 80 communications including the monthly newsletter, press releases and e-blasts. We have an average open rate of 15% and a click rate between 4-5% (meaning someone opens a link inside our email).

We utilized all the area Chambers and their calendar of events to promote our special events.

New and improved website was launched in September through Wix.com. It is much easier to edit and was considerably cheaper than the previous provider.

Opening Doors...Changing Lives (part deux) was again initiated by having yellow doors in the community. We received donations of parts and labor thanks to Southern Air and Home Depot and distribution by AEP.

We created an ECM booklet that can be used in a variety of ways when educating the public about what we do and who we are. Door Hangers were again part of the campaign materials playing off of the door theme.

## **Other Marketing**

In an effort to get LIVE UNITED in the community as much as possible we utilized our best outlet, the t-shirt. We purchased 2,500 shirts last year with LIVE UNITED on them and used the backs for various events (bowling, zombie run, Day of Caring and plain).

We asked all supporters to send in pictures of them in their LIVE UNITED shirts in various places and we promoted them through Facebook and our newsletters. We even partnered with the Lynchburg Hillcats to do a photo shoot of the team in their uniforms with LIVE UNITED tees on underneath.

For Day of Caring we had an airplane fly a LIVE UNITED banner around town for two hours, and we had area business put LIVE UNITED on their marquee to support the LIVE UNITED 360° idea.

We partnered with a variety of local business on a marketing front:

- Jersey Mike's Subs for their annual Month of Giving in March
- Progress Printing donated the ECM Booklet, and both 8-page newsletter mailers
- KHF, N&A, WSET and Comcast all made donations as part of their Corporate Keystone Partnership
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Please note that UWW has issued a new 8% royalty fee on branded promotional products when not purchased through the UWW store through Staples. This applies to anything that is not a hold-in-your-hand paper product.

Additionally, United Way Worldwide has chosen TWO of our submitted photos from our Day of Caring 2013 to use nationally in their Constant Contact templates (the email database we use).

## **YLS**

YLS members participated in a variety of community events wearing their LIVE UNITED shirts in the community:

- Field Day Olympics
- International DJ Fest
- Get! Downtown/Stay Downtown
- Painting the mural downtown on the Academy of Fine Arts
- Read for the Record
- Day in the Park
- Kegs & Corks
- Lynchburg Cooks
- Garagefest
- Blood Drives
- Various races/fun runs

## **Special Events**

In 2013 we brought Tabitha Abbott on as our Special Events Coordinator. Tabitha hit the ground running with our already established events, plus adding a few new ones.

### **2013 Event Accomplishments/ Highlights**

- January 26<sup>th</sup> and 27<sup>th</sup> – Super Bowl-A-Thon III  
102 Teams  
Total Revenue: \$14,965.68
- March 27<sup>th</sup> – 2013 Campaign Awards Breakfast  
(215 people in attendance)  
Total Expense: \$5,036.21  
Revenue: \$3,245.00
- April 22<sup>nd</sup> – Lynchburg Cooks for Hunger Relief  
Revenue: \$12,544.75  
Split between: Central VA Area Agency on Aging, Piedmont Community Impact Organization,  
Rivermont Area Food Pantry  
(Sponsored by 35 local restaurants)
- May 10<sup>th</sup> – Harris Corporation Golf Tournament  
Revenue: \$9,586.00  
Expense: \$5,729.30  
(Fundraiser sponsored Harris Corporation Employees; 22 Teams, 88 players)
- May 22<sup>nd</sup> – 20<sup>th</sup> Annual Day of Caring  
1,000 volunteers served 47 non-profits and a total of work completed valued at \$180,000
- September 6<sup>th</sup> – 20<sup>th</sup> Annual Williams United Way Golf Tournament  
Net: \$26,779 + match
- September 14<sup>th</sup> – B&W Poker Run  
Revenue: \$4089.00
- September 21<sup>st</sup> – Feeeenomonal Follies  
Net Revenue: \$2,892.55  
(Campaign Kick-off, 38 performers, 137 attendees)
- October Food Drive for Hunger Relief collected over 9,000 pounds of food  
13 area schools and 9 local businesses donated to benefit 10 non-profit agencies

- October 27<sup>th</sup> – First Annual Run for Your Life (Zombie Run)  
Expense: \$4,851.86  
Revenue: \$10,349.20
- November 22<sup>nd</sup>-24<sup>th</sup> – Festival of Trees  
Expense: \$2,532.19  
Revenue: \$9,356.76
- December 13<sup>th</sup> – Holiday Open House  
(Hosted by United Way Staff)

**Finance:**

Our Finance Department continues to look for new and improved ways to handle campaign pledges.

Over the last four campaigns, continuous improvement efforts in processing campaign pledges and payments have resulted in the reduction of approximately 700 man hours per year. Most campaigns and donations are now processed within 24 hours of receipt.

In 2012, Scott Insurance ran its first online campaign. Other online campaigns managed by UWCV include AREVA local and national, B&W, and Centra.

The Board of Directors approved United Way of Central Virginia’s Cash Management and Investment Policy, and the Finance Committee reviewed proposals for these services. In June of 2013, the first investment of \$50,000 was invested in UWCV’s portfolio.

The Finance Committee also performed its annual officers’ compensation review and retirement plan finance and due diligence review.

**Capital and Equipment Improvements:**

We updated and improved the front entrance by replacing poorly fitting exterior doors and adding interior glass doors.

We also reworked overhead lights in common areas to achieve approximately 10% energy savings in lighting.

**Emergency Food & Shelter Program (EFSP):**

\$52,521 in EFSP Direct and State Set-Aside funding was awarded to the counties of Amherst, Appomattox, and Bedford and the cities of Bedford and Lynchburg. The EFSP Local Board allocated those funds to be used for the following program services: mass shelter, other food, other shelter, rent/mortgage assistance, served meals, and utility assistance.

**Grow One:**

The 2012-2013 school year marked the first time Grow One and Lynchburg College's Center for Economic Development implemented their entrepreneurship curriculum in the classroom as opposed to a residential summer camp. The number of participants in the program increased from 35 campers to over 90 classroom students. Costs per participant fell from \$1,112 per camper to less than \$30 per student.

The culminating Market Day event was held April 11, 2013 at Lynchburg College. Thirty second through fifth grade business teams sold their goods and services at the marketplace, and awards were presented for Outstanding Entrepreneurs, Outstanding Marketers, and Most Innovative Product.

**Community Outreach:**

United Way of Central Virginia became the fiscal processor for Lynchburg Beacon of Hope; investing over 100 man hours to assist the new program establish banking, payroll and benefits, donation, and tax receipting processes.

United Way of Central Virginia also serves as fiscal agent for Smart Beginnings Central Virginia.

Members of the Finance and Operations team serve on the Amherst County Chamber of Commerce board, Friends of Amherst County, the Economic Education Council, and the Lynchburg Extension office's Extension Leadership Council.

In November Marie Martin was selected Outstanding Fundraising Executive by the Virginia Piedmont Chapter of the Association of Fundraising Professionals.

We still maintain a 4 of 4 star rating with Charity Navigator and have a Silver Seal with Guide Star.

The year 2013/14 was also a year filled with Community Impact meetings and changes.

The Community Impact Committee met regularly during 2013 with each of the sub-committees, Education Readiness, Structure for Support and Community Communications, working hard between meetings. Perspectives, a consulting agency, facilitated a donor survey and Board discussion for community impact. The United Way Board voted to gradually change the way we operate to focus directly on the issues that most significantly impact the citizens of Central Virginia. Our goal is not to do less, but to do more by concentrating on those areas where we can have a measurable impact, and where we can have the most positive effect. Education Readiness will be the first area of focus by our organization as we move forward.

We continue with our Corporate Keystone Program and have companies that cover our overhead expenses; therefore, 100% of donations to the General Fund go directly to programs.

In February 2013 we established our first Advisory Board in Campbell County, and in June we held the first meeting of the Appomattox Advisory Board. Both have been received extremely well with us being able to visit with area leaders in these communities and educate them on what UWCV brings to their community. Our goal is to work closely with these committees in order to make them realize how much of an important role UWCV plays in their community. Our goal for 2014 is to have additional Advisory Boards in Amherst and Bedford.

This past year also brought sad losses to not only UW, but to the Central Virginia Community.

We lost three individuals that gave of their time, talent and support over the years in many ways and will be missed greatly: Jiggie Holt, Pete Warren and Jim Candler.

With company changes, decreased giving and health insurance concerns, we are seeing our Campaigns begin to decline. It is getting more and more difficult for individuals to meet all the demands of daily living; therefore, we at United Way are constantly looking at ways to increase giving. It is very important that we constantly convey the message as to what our donors' dollars are accomplishing. What are the long term outcomes from their donations? How are we making a difference in their community?

Respectively Submitted By:

Marie Martin

Executive Director, United Way of Central Virginia