

Table of contents:

Page 2/4	Executive Director Comments.....	Marie Martin, Executive Director
Page 5	Campaign Activity	United Way Staff
Page 6/7	Education Readiness	Dawn Wise, Director Community Impact and Public Relations
Page 8/11	Marketing/ Special Events/Young Leader Society.....	Tabitha Abbott, Director Marketing and Special Events
Page 12/13	Community Impact/2-1-1 Information & Referral.....	Joan Phelps, Director Community Impact
Page 14/15	Finance/Campaign Processing/Grow One/Ted Talks.....	Tracy Price, Director of Finance

**Executive Director's Annual Report
to the Board of Directors
United Way of Central Virginia 2013/14**

After a lot of hard work on the part of our excellent Campaign Chair Dr. George Hurt and an equally excellent campaign cabinet our 2013 campaign closed in February at approximately \$3 million. Considering the state of our Central Virginia economy this was due to a lot of hard work on the part of all involved with United Way.

In January the Board voted to change the United Way of Central Virginia's mission statement, "To mobilize the compassionate power of our community to improve the quality of lives in Central Virginia".

Super Bowl-a-thon was held on January 25-26 as part of the 2014 campaign.

We continued working on Advisory boards in Central Virginia and currently have very strong boards in Appomattox, Bedford and Campbell Counties, each with 15 members or more. These boards are working to spread the word in their community about United Way; what we do in their community, how we can continue to help and they are helping us cultivate new business (KDC – Lynchburg), throughout Central Virginia. They also worked with our Smart Beginning Program to establish a list of what Parents can do to get their kids ready for kindergarten and what questions need to be asked when looking for a daycare center.

The year 2014 brought many wonderful volunteers from businesses, community and agencies working continuously to help move this United Way through change. Working to help us make the community aware of the need for change.

A community wide Summit was held on May 6th to introduce changes at UWCV. "ASK ABOUT JAMIE". Members of the Community Impact committee put together an outstanding event with Dr. Ralph Smith, Annie E. Casey Foundation as the Speaker on Education Readiness. The community was introduced to the new United Way model; moving from funding programs in partner agencies to funding issues. Education Readiness being the first issue.

In September the Community Impact Structure Committee proposed to the UW Board that a minimum of \$500,000 be allocated to education readiness over three years - it was unanimously approved. Starting with the 2014 campaign a minimum of \$166,666.66 would be moved to Education Readiness. Over the past four years United Way has directed \$75,000 from allocations to Community Impact. Taking this into consideration, we would be looking at a minimum of \$58,000 additional dollars from the 2014 campaign, "will this be enough?" A portion of the \$500,000 will come from money designated to Education Readiness.

Our Annual Awards Breakfast in May brought together companies, volunteers, agencies and donors that were recognized and celebrated for their giving to the Central Virginia Community.

May was also the month that the Governance Committee began looking at revisions to the UWCV By-Laws, fulfilling a 3 year requirement of UWWW.

It was announced that due to the difference in the 2013/14 campaign there would be 27% less for allocations in 2014.

In August we saw a name change in one of our partner agencies, Presbyterian Home Family Services/Family Alliance changed to HUMANKIND. Also in August, Rebuilding Lynchburg decided to cease operations. All building materials remaining were given to Interfaith Outreach.

Dawn Wise was hired as Community Engagement and Public Relations. Dawn will be working on the issues undertaken at UW. Part of her job descriptions will be looking for additional grant funding.

The Board established an Emergency Reserve Fund with an initial \$10,000 to assist the Central Virginia community in time of natural disaster or other major interruption.

Again, with no arm twisting, Dr. George Hurt agreed to be our Campaign Chair.

Under Dr. Hurt's leadership our 2014 campaign brought change to the United Way of Central Virginia.

Our 2014/15 Campaign kicked off on September 18th with an afternoon in the park and the Jamie video was introduced to the Central Virginia Community.

On September 25th I attended a short meeting in Roanoke with Stacey Stewart, President United Way of America. The discussion centered around changes at UWWW and their focus on Education, in particular Early Childhood Education. We will be receiving information about the plan to resource the Enterprise-Wide Strategy in 2015.

September found United Way wrapped in toilet paper and other paper products. Georgia Pacific generously donated 350 cases (60 rolls in a case) to United Way for our Partner agencies and other agencies in the community that provide direct assistance to individuals. We had a trailer at Sam's on September 6 to collect other paper products for these agencies. We had an awesome distribution of these products on September 8 at the Blue Ridge Area Food Bank who partnered with us to transport all the products.

Again, and back by popular demand and Marcia Thom-Kaley's devotion to United Way another wonderful Feeeennomenal Follies was performed by community individuals who always have a wonderful time meeting and entertaining others for the good of UWCV.

Our Young Leaders Society continues their backpack program with Paul Munro, delivering 20 backpacks every Friday. Funds to support this program are from a 2013 grant from Food Lion. Georgia Pacific conducted a food and money drive to provide additional support for this program. Genworth also conducted a food drive to support the program.

Our Women's Leadership Council continues their support of early childhood education, issuing four grants to area programs.

Smart Beginnings has been busy: 5,540 children were read Bunny Cakes on Read for the Record day October 21, 2014 in each of our jurisdictions.

In November the UW Board voted to accept the revised By-Laws.

On December 3rd, with the help of many campaign members we held an event at Oakwood Country Club to solicit new donors.

A Leadership donor reception was also held at City View on December 11. Marc Schewel did an excellent job talking about the changes at United Way of Central Virginia. The event was again, this year, sponsored Nationwide.

On December 12 our annual open house was held here at the United Way Office.

Through all the changes in 2014 our Campaign Chair, Cabinet, Resource Development and staff have worked diligently to keep the campaign on track. Although it is extremely hard to track our campaign during the last few months, by best estimate we are \$75,000 behind same date in 2013.

During 2014 we have continued to see changes throughout the Central Virginia Community. Two locally owned companies were purchased either totally or partially by out of the area entities. Also, we hear rumblings of sales or relocation of additional companies.

Through all this the one thing that remains strong in our area is the wonderful support of donors who "Live United" to continue working towards making this an outstanding community to live and work.

Respectively Submitted

Marie Martin, Executive Director

2014 Campaign/activities to date:

Employee Campaign Management training for volunteers from over 40 Companies throughout Central Virginia.

Conducted more than 90 campaign presentations and agency fairs.

On December 3rd, with the help of many campaign cabinet members, held an event at Oakwood Country Club to solicit new donors.

Hosted a Leadership donor reception on December 11. The event was generously sponsored again, this year, by Nationwide.

Sent individual Campaign Cabinet sector mailers to donors/prospective for sectors: Physicians, Insurance, Finance (Financial Advisors), Architects & Engineers and Bankers.

Mailed: 46,679 campaign kickoff letters in September using a screened/qualified Polk directory of residents in our service area, plus combined with United Way residential list.

Continued "Thank you", program from the 2013 Campaign. Each week a thank you note, sign by Marie, is sent to all residential and workplace campaigns donors, plus in 2014 added a personal handwritten thank you note sent from Marie to \$700+ donors.

Submitted grants to following

Bank of America
Wells Fargo
Norfolk Southern
Dominion Power

Education Readiness Initiative

In September, the UWCV Board of Directors voted to designate a minimum of \$500,000 over three years to Education Readiness.

An “Education Readiness Initiative” brochure was created and 40,000 printed and distributed in all 2014 UWCV Campaign presentation packets.

As a result of the feedback from one of the Advisory Boards, an “Education Readiness in Central Virginia” checklist was created and 45,000 were printed. Many have begun to be distributed to libraries, pediatricians, child cares, churches, etc.

In September, the Education Readiness Initiative Campaign was launched and was branded “Meet Jamie.” A “Meet Jamie” 5-minute video was put on the front page of the United Way of Central Virginia website, and was presented as part of all campaign presentations. Similar marketing materials with “Meet Jamie” were also launched, including billboards, roadside signs, and commercials and a “Meet Jamie” social media campaign was created.

UWCV submitted a Letter of Intent to join the national Campaign for Grade-Level Reading Network, a powerful convener of like-minded organizations in the issue of Education Readiness and Early Childhood Education. UWCV was accepted as an official Prospective Community and Dawn Wise participated in the regional Campaign for Grade-Level Reading Conference in Roanoke.

A 32-page “United Way of Central Virginia – Education Readiness Initiative” informational presentation booklet and a 10-page “United Way of Central Virginia’s Education Readiness Initiative – An Investment in Our Future” presentation booklet for potential donors was created to help convey the message of Education Readiness and the role UWCV is taking towards Community Impact.

UWCV attended several Lynchburg City Schools Summits and Dawn has been invited to be a part of a breakout Lynchburg City Schools ‘Mental Health Summit.’ At the Mental Health Summit, talks have begun on how UWCV’s RFP as well as SBCV’s literacy buses can assist in helping tackle many of the mental health and behavioral issues of our area’s young children.

In October, Dawn met with the staff of the Altavista Dolly Parton Imagination Library to begin the planning stages of incorporating a Dolly Parton Imagination Library in all of Central Virginia.

Dawn met with Leadership Lynchburg participants to help create the EZ-Partner Portal for Lynchburg City Schools. The EZ-Partner is a virtual community building tool which pairs needs of LCS with those of its Business Partners in Education. R.S. Payne Elementary was one of the first to use this tool, when food for its backpack program was running so low, it was going to be forced to suspend the program. Through the EZ-Partner Portal, R.S. Payne was able to quickly and confidentially solicit donations of food and continue to feed needy children of the school.

In November, UWCV officially launched an Education Readiness Initiative Request for Proposal page on its website, where it included a draft of the grant and other tools. Information sessions for potential applicants were held on November 12th and 13th with 35 people in attendance.

An Education Readiness Initiative information page was launched on the UWCV website. It will contain resources for parents, grandparents, educators, and other stakeholders on Education Readiness, including checklists for development, child care, and literacy.

Dawn participated in American Education Week, and toured local elementary and high schools to see and better understand educators, volunteers, mentors, and students at work.

In December, the UWCV Community Impact Steering Committee met to outline priority strategies for its Community Solutions Action Plan. The Action Plan skeleton was created and then forwarded to the SBCV Steering Committee and other educators and leaders in the field of Early Childhood Education to fill in action steps.

A “Child Care in Central Virginia” special task force meeting was held at UWCV on December 1st to discuss local and regional child care issues and tragedies. Local legislators, police officers, educators, and government were represented in addition to UWCV and SBCV staff to discuss potential policy changes to local government in regards to the regulation of unlicensed child cares. A “What is Quality Child Care” checklist was created and distributed as an accompaniment to the aforementioned “Educational Readiness in Central Virginia” checklist.

Marketing Department

WSET:

Comcast: 339 Campaign PSAs run on over 14 networks including A&E, ABC Family, BET, CMT, Discovery, History, HLN, Lifetime, MSNBC, and various others/ Over 250 spots run for the Zombie Run

News & Advance: We had approximately 15-20 stories about UWCV and mentions through many more stories of our partner agencies

Social Media/Facebook: We currently have 449 likes, an increase of approximately 120 in the year. Highest event reached 1,183-Run for Your Life Zombie Run
Used Facebook paid advertising and boosts this year for the Zombie Run and Dine-Out-Day

Constant Contact: We currently have around 6,800 subscribers to our e-newsletter that goes out monthly. In 2014, we sent 104 communications including the monthly newsletter, press releases and e-blasts. We have an average open rate of 26%, which is up 10% from 2013.

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

The Meet Jamie Campaign was initiated for 2014 with the introduction of our Campaign video showcased on our website and in individual campaign presentations. We committed to roadside signage in that was displayed between September and December- and generously put up by AEP. We also used Billboards this year- 12 in various locations between September and December.

We created new brochures for the Education Readiness Initiative, as well as updated the pledge forms and campaign materials to reflect the new mission.

Other Marketing

In an effort to get LIVE UNITED in the community as much as possible for Day of Caring we had a banner created that was worn by a Sky Diver for the event, as well as had area businesses 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- Netting \$13,840.74 in 2014!
- Progress Printing donated the Education Readiness Brochure, the Pledge Forms and Appeal Letters and envelopes for 2014
- N&A, WSET and Comcast all made donations as part of their Corporate Keystone Partnership

YLS

YLS Volunteers participated in 23 events

January 2014: United Way Super Bowl-A-Thon

February 2014: Boys & Girls Club of Central Virginia Resolution Run

March 2014: Presbyterian Homes Spelling Bee

April 2014: Riverfront Challenge-- Wheel Power Event, Lynchburg Cooks at Phase 2, Paul Munro Elementary School Carnival, CVCC Color Splash Dash, and Coalition against Domestic Violence for the 24th District Supply Drive

May 2014: Day of Caring at City Stadium

June 2014: Rebuilding Together weekend build, Lynchburg Humane Society Kick-Off Event

September 2014: YLS Cornhole Tournament, Get Downtown, GP Paper Drive at Sam's Club, Amazing

Race & Virginia 10 Miler, International DJ Festival at the Urban Arts Garage

October 2014: Altavista Habitat for Humanity Blitz Build, Read for the Record Event, Run for your Life

Zombie Run

November 2014: Girls on the Run 5K, HumanKind Turkey Trot 5k, Red Kettle Bell Ringing for Salvation

Army

December 2014: Lynchburg Christmas Parade

****School Year:** Volunteers participate each week in purchasing food, packing book bags, and delivering them to the students at PMES each Friday so the students have 3 meals + 2 snacks for each day of every weekend during the school year.

****YLS** also has several volunteers that participate throughout the year with Big Island Elementary Schools Reading Buddies program in which they go at least once or twice a week to read to a student for 30 minutes.

Paul Munro S.O.S. Backpack Program:

At the end of the 2013-2014 school year: YLS served 20 students through the backpack program

Net spending for 2013-2014: \$2,621.26

For the 2014-2015 school year: we are serving 30 students (12 individual students + 6 families that have 2-4 students in the family)

For 2014-2015, YLS has received:

\$3,500 Grant from Food Lion

Canned Food Drive + Free Kids Cut coupons for each student at PMES from Sylvain Melloul

International Hair Academy

Canned Food Drive from Genworth + we had several volunteers from Genworth come to help sort food and pack the book bags for the Christmas Holiday Break

Canned Food Drive + 5 new bookbags + goodie bags + over \$1,300 donation from Georgia Pacific Big Island

Special Events

2014 Event Accomplishments/ Highlights

- January 25th and 26th – Super Bowl-A-Thon IV
111 Teams

Total Revenue: \$30,352.01

- March 26th – 2014 Campaign Awards Breakfast
(215 people in attendance)

Total Expense: \$3692.12

Revenue: \$2757.50

- April 21st – Lynchburg Cooks for Hunger Relief

Revenue: \$17,061.75

Split between: DAWN, The Salvation Army, Parkview Community Mission
(Sponsored by 35 local restaurants)

- May 2nd –Annual Williams United Way Golf Tournament

Net: \$43,249.40 + match= over \$80,000 for 2014!

- May 13th – Harris Corporation Golf Tournament

Revenue: \$3960.57

(Fundraiser sponsored Harris Corporation Employees; 21 Teams, 84 players)

- May 21st – 21st Annual Day of Caring

1,200 volunteers served 60 non-profits and a total of work completed valued at 220,000.

- September 13th – B&W Poker Run

Revenue: \$1,925.00

- September 27th – Feeeenomenal Follies

Revenue: \$2,705.00

(31 performers, 137 attendees)

- October Food Drive for Hunger Relief

Over 45 local businesses participated to give back to 12 local agencies

- October 26th – Second Annual Run for Your Life (Zombie Run)

Expense: \$7,337.67

Revenue: \$8,970

- November 4th – Dine Out Day for United Way

Revenue: \$4,004.41

Over 20 participating local restaurants and facilitated by Rob Pearson of Charley's Restaurant

- December 11th – Leadership Reception at City Views

Sponsored by Nationwide Insurance with a \$5,000 donation

Community Impact 2014

Distributed \$1,578,487 to programs of Partner Agencies. Donor Designations and Impact designations were distributed to agencies. Presbyterian Homes and Family Services/Family Alliance changed their name for branding purposes to Human Kind. Rebuilding Together – Lynchburg dissolved as an agency. A similar program is under Interfaith Outreach.

Women’s Leadership Council embarked on exciting new projects. The WLC approved funding for four agencies: Tiny Angels Early Learning Center to support their Virginia Star Quality Initiative program improvement; Smart Beginnings to support the Virginia Star Quality Initiative program and Gus the Bus; Bedford YMCA to support the Preschool and After School programs and YMCA of Central Virginia to support the summer learning program with R.S. Payne Elementary school.

Smart Beginnings has been busy: 5,540 children were read Bunny Cakes on Read for the Record day October 21, 2014 in each of our jurisdictions. This fiscal year, 15 Professional development programs have been provided serving 310 early childhood education and care givers. 365 hours of on-site mentoring have been completed since July 2014 through Virginia Star Quality Initiative (VSQI).

Dr. Ralph Smith, Vice President of the Annie E. Casey Foundation, and Managing Director of the National Campaign for Grade Level Reading was the keynote speaker at the United Way's Summit in May. The summit served as a formal announcement of the UWCV's Education Readiness Initiative. Approximately 80 community leaders were in attendance. Dr. Smith emphasized that a great deal of research has shown the importance of ensuring that children develop proficient reading skills and are reading at grade level in 3rd Grade. Dr. Smith also endorsed activities that develop the necessary skills for later reading, during the early years (birth through age 5).

In December, Smart Beginnings of Central Virginia hosted a meeting/dialogue with Lynchburg City Manager, City Attorney, Commonwealth Attorney and others to discuss Safety in Family Day Care sites.

UWCV attended several Lynchburg City Schools Summits and Joan is part of a breakout Lynchburg City Schools Poverty work group.

2-1-1 Resource Specialists answered 18,547 calls and gave over 37,539 referrals in 2014. 2-1-1 Center is responsible for updating the 2-1-1 Statewide Database. 20,535 programs were updated and 2,242 new programs were added to the 2-1-1 database.

2-1-1 staff participated in two statewide drills for Dominion Virginia Power Nuclear Disaster drills. All data on the Ebola virus was entered in the 2-1-1 database as 2-1-1 was the number distributed by the Governor to call for information.

Nine students in the Master Education, Educational Leadership Program at Lynchburg College spent hours with 2-1-1 staff learning about resources in the community and how they could use

these resources to help children and families in their schools be better connected to services in the community.

Neighbor to Neighbor (Appalachian Power Program) provided \$3,038 (half-year) in assistance.

Energy Share (Dominion Power) provided in \$24,876 assistance.

Financial Assistance through an anonymous donor provided \$6,316 in assistance.

Distributed \$112,972 worth of resources to agencies through the Gifts in Kind program.

Finance:

United Way of Central Virginia continued to expand its investment portfolio under the newly approved Cash Management and Investment Policy. In 2014, this portfolio had accumulated returns of more than 3.3%.

The Board established an Emergency Reserve Fund with an initial \$10 thousand to assist the Central Virginia community in time of natural disaster or other major interruption. The Board also approved policies regarding partner agency participation in United Way of Central Virginia employee benefits.

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

Campaign Processing:

Over the last several 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.

Last year, we implemented the ANDAR payout module, which automates the nearly 1400 designation payments made each year, improves agency reporting, and facilitates audit and reconciliation to campaign and payables.

We also implemented the ANDAR events module, which allows more detailed tracking of fundraising profitability and participation.

United Way continues to service our larger workplace campaigns through eWay online giving. This platform creates a campaign presence unique to each employer while automating pledge and designations processing. Last year, more than 2500 pledges were processed through this program at B&W, Scott Insurance, Centra Health, and AREVA.

Emergency Food & Shelter Program (EFSP):

\$41,779 in EFSP Direct and State Set-Aside funding was awarded to the Counties of Amherst and Appomattox, the Town of Bedford and the City of Lynchburg. The EFSP Local Board allocated those funds to be used for mass shelter, food, other shelter, rent/mortgage assistance, served meals, and utility assistance.

Grow One:

The 2013-2014 school year marked the second time Grow One and Lynchburg College's Center for Economic Education implemented their Mini-Economy entrepreneurship curriculum in the classroom. The number of participants in the program increased from 90 to 159 elementary school business owners. The culminating Market Day event was held April 2, 2014 at Lynchburg College. Forty-Eight businesses sold their goods and services at the marketplace, and awards were presented for Outstanding Entrepreneurs, Outstanding Marketers, and Most Innovative Product.

TED Talks:

United Way of Central Virginia began hosting monthly TED Talk discussions. TED is a nonprofit organization that focuses on technology, entertainment, design, and other ideas worth sharing. TED Talks are short video recordings of presentations by recognized thought leaders. TED Talk discussions present a way for citizens to come together to discuss matters important to the Central Virginia community. During 2014, these discussions centered on entrepreneurship, early education, crime prevention, fundraising, nonprofit management, and the arts.

Community Outreach:

United Way of Central Virginia continues to serve as fiscal processor for Lynchburg Beacon of Hope, investing over 200 man hours to assist the new program with banking, accounting, payroll and benefits, donation, and tax receipting processes.

United Way of Central Virginia also serves as fiscal agent for Smart Beginnings Central Virginia, investing over \$22 thousand in in-kind services, office space, supplies, insurance, and other costs.

Members of the Finance and Operations team continued serving 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.