

UNITED WAY OF ROCKBRIDGE ANNUAL REPORT FY JULY 1, 2016 - JUNE 30, 2017

LOCAL PEOPLE MEETING LOCAL NEEDS

PRESIDENT'S MESSAGE

As President of United Way of Rockbridge I reflect on the past year as a time of strategic planning for the future. I have had the support of a wonderful executive director and a talented, enthusiastic, and determined Board of Directors who work with me to make our community a better place to live.

We have continued to review and update our policies with thoughts to long range organizational sustainment. Additionally, we explored and tested new approaches that target our fundraising campaign to specific audiences. Through this we are attempting to appeal more directly to younger donors and newcomers in the area, and to increase the membership of our honored General's Club. When this current campaign ends we'll have some concept of the level of our success.

During the past year we funded significant community successes. We provided grant monies that allowed twenty-two programs to be carried out by eighteen different local agencies. Many of these success stories are detailed further in this report.

The UWR recognizes its strength is in the partnerships we can build. To that end we began holding board meetings at some of our agency locations to gain a better understanding of their organization and how we can assist. We hope to participate even more in this manner moving forward.

The United Way of Rockbridge also received a very substantial bequest from the estate of a long time and supportive donor. This bequest equaled a typical year of fundraising for us. We have spent considerable time reflecting, discussing, analyzing, brainstorming, and researching the best use of this significant donation. To honor Ellen Charske we know we must make a strong and healthy decision.

I look forward with trepidation because I know the needs of our community are many and pressing. We're unsure of what the new tax law may mean for us in our fundraising efforts going forward, but we do know we will continue to work diligently to fulfill our mission.

Holt Merchant
UWR Board President

BOARD OF DIRECTORS 2018

Holt Merchant, President Janet Lemmer, Vice President Kelly Fujiwara, Secretary Debbie Pollard, Treasurer

Malcolm Brownlee
Scott Jefferies
John Murphy
George Pryde
Dale Raymond
Joseph Skovira

Patte Wood, Executive Director
Wenle Mu, W&L Student Intern

Community Member Volunteers:

Barbara Rowe
Michael Smitka
Margy Werling
David Zwart

Audit Committee:

John Murphy – Chair
Janet Lemmer
Dale Raymond

Finance Committee:

Debbie Pollard – Chair
Joe Skovira
David Zwart, Community Member

Allocations Committee:

Mike Smitka – Chair and
Community Member
Holt Merchant
Joe Skovira Malcolm
Brownlee
Barbara Rowe – Community
Member

- FUNDRAISING PROGRESS -

2015-16 Goal \$250,000 / Raised \$230,209 - 92%

2016-17 Goal \$250,000 / Raised \$245,241 - 98%

BOARD TRANSITIONS 2017-2018

Retiring Board Members (Years Served):

Barbara Rowe (3), Michael Smitka (6), Margy Werling (6), David Zwart (1), Suzanne Gardner (3)

Continuing Board Members:

Kelly Fujiwara, Janet Lemmer, Holt Merchant, John F.X. Murphy, Debbie Pollard, Joe Skovira

New Board Members:

Malcolm Brownlee, Scott Jefferies, George Pryde, Dale Raymond

Biographies of Board Members can be found on the UWR Webpage at www.uwrockbridge.org

SPECIAL THANKS TO OUR COMMUNITY VOLUNTEERS

- ❖ DuPont Credit Union Lexington Branch employees donated items to the UWR "Stuff the Bus" school supply program.
- ❖ Pat Cleaveland and Pat Thomas personally donated their time and money to buy books for the Lexington Health Department and the Rockbridge Area Health Clinic.
- ❖ Community Food Drive for Campaign 2016-17 collection locations were: Blue Phoenix Café, Donald's Meats, Fairfield General Store, Kroger, Lee Hi Travel Plaza, Maury River Senior Center, Rockbridge Regional Library, Spirit Horse Shenandoah Valley, Sweet Treats Bakery, Union Bank, Virginia Horse Center and the YMCA.
- ❖ A Community Book Drive for the upcoming 2017-18 campaign was planned and included collection locations at: Books and Co. Toys, too!, The Bookery, Donald's Meats, DuPont Credit Union, Fairfield General Store, Lee-Hi Travel Plaza, Lexington Eye Care, Maury River Senior Center, Pack and Mail, Rockbridge Area Hospice, Rockbridge Regional Library, Spencer Home Center, Spirit Horse Shenandoah Valley, Sweet Treats, Union Bank BV, Virginia Horse Center, and YMCA.



Sarah Landrum donates school supplies from DuPont Credit Union for Stuff the Bus

FINANCIALS

Statement of Financial Position

ASSETS		
<u>Current Assets:</u>	<u>2017</u>	<u>2016</u>
Cash and cash equivalents	\$ 154,494	\$ 105,402
Contributions receivable	\$ 296,623	\$ 74,157
Prepaid expenses	\$ 2,942	\$ 2,968
Total Current Assets	\$ 454,059	\$ 182,527
<u>Property, Plant, and Equipment:</u>		
Office equipment	\$ 1,716	\$ 1,716
Accumulated depreciation	\$ (1,354)	\$ (1,243)
Net Property and Equipment	\$ 362	\$ 473
<u>Other Assets:</u>		
Investment securities	\$ 30,768	\$ 27,154
Lease deposit	\$ 500	\$ 500
Total Other Assets	\$ 31,268	\$ 27,654
Total Assets	\$ 485,689	\$ 210,654
LIABILITIES AND NET ASSETS		
<u>Current Liabilities:</u>		
Accounts payable	\$ 395	\$ 627
Accrued salaries and taxes	\$ 1,004	\$ 1,006
Commitments for agency support	\$ 73,800	\$ 74,200
Total Current Liabilities	\$ 75,199	\$ 75,833
<u>Net Assets:</u>		
Without donor restrictions	\$ 400,046	\$ 124,377
With donor restrictions	\$ 10,444	\$ 10,444
Total Net Assets	\$ 410,490	\$ 134,821
Total Liabilities and Net Assets	\$ 485,689	\$ 210,654

Statement of Activities and Changes in Net Assets

<u>Changes in Unrestricted Net Assets:</u>	<u>2017</u>	<u>2016</u>
Gross Campaign Results	\$ 246,750	\$ 231,356
Less: Donor Designations	\$ (14,157)	\$ (18,770)
Less: Uncollectible Pledges	\$ (22,887)	\$ (2,926)
Net Campaign Revenue	\$ 209,706	\$ 209,660
Investment Income	\$ 489	\$ 519
Other contributions	\$ 277,383	\$ 2,398
Total Revenues and Gains	\$ 487,578	\$ 212,577
<u>Expenses:</u>		
Member Agency Allocations	\$ 149,601	\$ 149,399
Less: Allocations Funded through		
Donor Designations	\$ (14,157)	\$ (18,770)
Total Allocations-Grants-Programs	\$ 135,444	\$ 130,629
Program Support Services	\$ 21,789	\$ 26,825
Direct Program Support	\$ 157,223	\$ 157,454
Management and General Expenses	\$ 40,857	\$ 48,637
Fundraising Expenses	\$ 15,114	\$ 13,775
United Way of America Dues	\$ 1,856	\$ 1,278
Total Expenses and Losses	\$ 215,060	\$ 221,124
Change in Net Assets from Operations	\$ 272,518	\$ (8,141)
Unrealized Investment Gain	\$ 3,151	\$ 406
Net Assets at Beginning of Year	\$ 134,821	\$ 142,962
Net Assets at End of Year	\$ 410,490	\$ 134,821

[Audited by Raetz and Hawkins. Only 1% of UWR income goes to United Way Worldwide. UWR's overhead rate is approximately 19%. A copy of the complete Financial Review and Form 990 is available on the UWR website at www.uwrockbridge.org.]

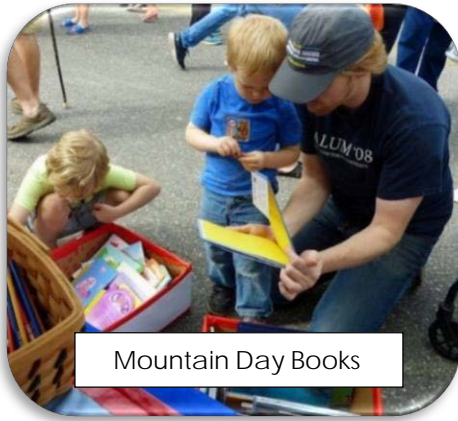
2017 AGENCY FUNDING

In 2016, UWR received \$200,880 in requests from 19 agencies for 25 programs. UWR awarded \$146,000 in grants to 18 agencies for 22 programs funded in CY2017. UWR also allocated \$8,200 for UWR Community Impact sponsored programs. In 2017, UWR received \$216,675 in requests and increased funding to \$186,635 for CY2018.

Agencies

Blue Ridge Autism and Achievement Center
 Blue Ridge Legal Services
 Blue Ridge CASA for Children
 Boxerwood Educational Association
 Campus Kitchen Summer Backpack Program
 Campus Kitchen Mobile
 The Coffee House of Rockbridge
 The Community Table
 Meals for Shut-Ins
 Natural Bridge-Glasgow Food Pantry
 Rockbridge Area Health Center

Rockbridge Area Occupation Center
 Rockbridge Area Relief Association
 Rockbridge Area Transportation System
 Rockbridge Regional Library
 Talking Book Center
 Valley Program for Aging Services
 Yellow Brick Road
 YMCA of Rockbridge
UWR Community Impact Programs
 Rockbridge READS!
 Christmas Basket Books
 Stuff the Bus



Mountain Day Books



Face painting at A Day in K

SPECIAL EVENTS AND PROGRAMS

Rockbridge READS!

This past year, Rockbridge READS received gently used and new books from community organizations and encouraged the community to donate children's books. Book drives were held by VMI & W&L students and the books were distributed to children at the Rockbridge Community Festival and Mountain Day in Buena Vista. They were also distributed to the Health Department, Rockbridge Area Relief Association and the Community Table throughout the year. With our Community Impact Initiative, UWR continues to seek opportunities and encourage its funded agencies to promote early childhood literacy.

A Day In K

The second annual "A Day in K" event was held at Hull's Drive-In on Thursday, April 6, 2017. While especially for Pre-K children, all families with young children were invited to the free event that included an original video on kindergarten in our community, movies and activities. Staff and teachers from Buena Vista, Lexington and Rockbridge County schools participated along with the library's book mobile, a school bus to explore and police and fire departments to make the move into Kindergarten an exciting and anticipated experience.

The Rockbridge Teacher Education Consortium helps plan the program. With your help and through your donations, we aim to develop opportunities for every child to succeed.

Members of the committee are Lisa Clark, Lauren Fauber, Kelly Fujiwara, Sherry Higgins, Tracy Hinty, Scott Jefferies, Kim Kearney, Janet Lemmer, Tim Martino, John Murphy, Haley Sigler and Margy Werling.

The third annual "A Day in K" will be held at on Thursday, April 12 (rain date April 19).

OUTCOMES & SUCCESS STORIES

Blue Ridge Autism and Achievement Center

United Way of Rockbridge provided funding for half the cost of an expansion project that will allow BRAAC's nine students in their Lexington location to better develop gross motor skills. BRAAC acquired the additional space in July and plans include swings, play-safe floors, small trampolines, kinesthetic learning tools, sensory-safe play, among other items, to facilitate their teaching targets.

Blue Ridge CASA for Children

CASA serves abused and neglected children who are referred to them by the Juvenile and Domestic Relations Court, providing advocacy for their mental and physical health, educational needs, and overall well-being. With United Way's funding CASA served 6 children with 7 trained volunteers.

Blue Ridge Legal Services

Of the 188 cases BRLS closed during the year, 65 were for families with preschool to 3rd grade children. In all, 137 children benefited from a combination of better shelter, greater stability, more opportunities, more financial support, and more access to basic services. BRLS's Lexington office also opened 205 new cases and completed 188 cases continuing cases for local low-income residents during 2017.

Boxerwood Educational Association

During the fall, Boxerwood used United Way's funding to subsidize hands-on nature programs for all first and second grade students from Central Elementary School and Waddell Elementary School. Students explored mechanisms of seed dispersal and plant and animal adaptation as a part of Boxerwood's SOL-correlated program.

Campus Kitchen at W&L

The Campus Kitchen Backpack Program provided weekly after school snacks to about 700 pre-K and elementary school students on the free or reduced lunch program in Rockbridge County. In addition, to alleviate some issues regarding food access in rural areas such as ours, the Campus Kitchen Mobile Food Pantry program delivered food in Effinger/South Buffalo, Rockbridge Baths, and Raphine to about 180 clients each month.

The Coffee House of Rockbridge

The Coffee House of Rockbridge creates a space for individuals with disabilities to interact with each other and with other volunteers from the community. In 2017, Coffee House offered ten events, including May Prom and June Picnic at McKeithan Park funded by United Way.



Community Table of Rockbridge

One initiative for The Community Table last year was to assist children with the social skills needed to dine publicly with confidence. Skills included how to use utensils, how to interact with servers, and how to properly place napkins. Further investing in local children, The Community Table

also distributes books and emphasizes literacy through storytelling each week. The Community Table is recognized as a leader in efficiency and professionalism in dealing with hunger and seeks ways to help other agencies follow similar best practices.

Meals for Shut-Ins

Meals for Shut-Ins delivered meals to thirty to thirty-five clients in Lexington every weekday. They also collaborate with Meals-on-Wheels on emergency weather non-perishable food boxes.



Delivering a Meal

Natural Bridge/Glasgow Food Pantry

The NB/G Food Pantry delivered food boxes to up to 400 households each month. The Food Pantry is totally run by volunteers.



NB/Glasgow Food Pantry

Rockbridge Area Health Center

RAHC offers school based oral health services to preschools, Head-Start programs, and public schools with parental consent. The UWR funding provided oral health exams, x-rays, cleaning,

fluoride treatment, and varnishes. In their spring 2017 initiative, RAHC provided care to over 300 children, some of whom also passed on what they learned to their parents.

Rockbridge Area Relief Association

RARA partners with multiple local organizations and provides comprehensive support for the individuals and families they serve. They partnered with the Magnolia Center - the Community Services Board Adult Day Support Center - to provide meaningful volunteer opportunities. RARA also hired an AmeriCorps VISTA member to focus on nutrition education and volunteer



RARA Food Pantry

management, continued to have the Library's Bookmobile each month provide job search and resume writing assistance, and collaborated with UWR Funding provided for the help line and utilities.

Rockbridge Area Transportation Services

RATS provided more than 24,000 trips and logged more than 376,000 miles in 2017 to serve our area's residents. This included more than 1,000 children in partnership with YMCA and the Woods Creek Montessori.

Rockbridge Area YMCA

With UWR funding, YMCA implemented their interactive "One Book, One Summer" program last past summer to encourage and enable critical thinking, creativity, and research, thereby investing in children's skill that provides the basis for lifetime learning and productivity.

Rockbridge Regional Library

In 2017 the Rockbridge Regional Library focused on pre-literacy skills to prepare around 350 local five-year-olds for Kindergarten through activities and handouts such as interactive songs and games, "Lesson Boxes" for preschool teachers to have complete classroom story-times, and Get-Ready-For-Kindergarten kits for parents. About seventy-five percent of the library's programs are for children under third grade.

Talking Book Center

The Talking Book Center provides free library books for area resident with disabilities. TBC circulated more than 2800 books, serving about eighty residents in our area.

Valley Program for Aging Services

During 2017, VPAS provided more than 700 Medicare counseling sessions to more than 400 individuals in our area, saving them \$177,682 in medication costs for 2018. Thanks to the complete, accurate and unbiased information that VPAS provided, residents were able to choose the most cost-effective prescription drug plan that best met their individual needs.

Yellow Brick Road Early Learning Center

UWR's funds supported scholarships that YBR provides to families. This year YBR opened two new classrooms, renovated its facility, and built two new playgrounds. YBR's teachers are earning their Child Development Associates certifications, contributing to YBR's higher ratings in Virginia's Quality Rating and Improvement System.



HELP US MEET OUR CURRENT FUNDRAISING GOAL! We need just \$25,000 to be at 100%.

Just \$1 a week or \$52 will fund:

- 3 months of food through RARA
- 11 meals for shut-ins
- 9 early learning backpacks to preschool children
- A pediatric dental exam at the Rockbridge Area Health Center

Please donate at www.uwrockbridge.org

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