



United Way  
of the Bluegrass

# 2023

Annual  
Report

2022-2023

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## OUR MISSION:

WE FIGHT FOR THE **BASIC NEEDS, EDUCATION**  
AND **FINANCIAL STABILITY** OF EVERY PERSON  
IN CENTRAL KENTUCKY.



After more than a century of service, United Way of the Bluegrass (UWBG) still provides the resources, expertise, vision and leadership to help bring community-driven goals to life.

Since 1921, we have been tackling the region's most pressing needs. Each day we fight for the basic needs, education and financial stability of every person in the ten counties we represent: Anderson, Bourbon, Clark, Fayette, Franklin, Jessamine, Madison, Montgomery, Scott and Woodford.

Through our WayPoint Centers and 211 contact center, we are able to provide support to our neighbors when and where they need it.

Your continued support of United Way of the Bluegrass helps make this possible.

*Change doesn't happen alone.*



**Let's LIVE UNITED**  
for a better, stronger Bluegrass.

# A Letter from the President

The last year has been an exciting time of growth for United Way of the Bluegrass (UWBG), our WayPoint initiative and our partners in the community. As we look back on this year of progress and achievement, we will also look forward to the opportunities we can seize in the coming year.

There is no doubt we have been tested this year, like many other organizations and individuals. Even when facing those challenges, our organization has steadily made strides to evolve into the modern-day United Way that our Bluegrass community both needs and deserves. There are many achievements that UWBG can be proud of over this past year, but we wanted to highlight some accomplishments that have had the greatest impact on our 10-county service region. Some of those include:

- **Over 118,000 Central Kentuckians were served through UWBG programming, 211, WayPoint Centers and agency partner programming.**
  - » **4,082 people served through our Volunteer Income Tax Assistance (VITA) program;**
  - » **Over 2,100 students served through our Sweet Dreams Project across 13 school districts;**
  - » **25,751 calls received through 211;**
- **148,297 volunteer hours served through UWBG and partner programming.**
- **\$2.92M raised through workplace campaigns to be distributed to our 57 nonprofit partners across the Bluegrass.**

We also want to highlight the tremendous expansion and growth of our WayPoint Initiative. In 2023, we opened the doors to a new location and began renovations on the historic Palmer Pharmacy which will house our flagship Center, the Marksburg Family WayPoint Center at the Historic Palmer Pharmacy in the East End of Lexington. This Center will take the place of the current WayPoint Center in the Charles Young Center. It will serve as a hub for the East End community, while being accessible to those who reside in other communities outside of the East End.



We also opened the doors to the WayPoint Center at the Centro de San Juan Diego in Lexington's Cardinal Valley neighborhood. This unique location will serve populations that primarily speak Spanish and Swahili, as well as native English speakers. This is UWBG's first physical location in this neighborhood and will provide much needed services to this community.

Looking ahead, we have many exciting opportunities and challenges awaiting us, and we know we need your help to continue on this journey as we make an impact on the Bluegrass. I want to express my sincere gratitude for your unwavering support and dedication to the mission of United Way of the Bluegrass over the years. Together, we are creating positive change, fostering thriving communities and empowering individuals to reach their full potential. The UWBG team is looking forward to another year of transformative impact and growth and we are poised to make a greater impact than ever before.

With our focus on expanding our WayPoint Initiative across the region and serving the needs of everyone in our community, we are evolving and growing into the modern-day United Way of the Bluegrass. We will continue to work together as a unified team through fundraising, advocacy and programmatic work. We will continue to build a better, stronger Bluegrass where all can thrive. I ask you to join me. Make the pledge to continue to LIVE UNITED today and every day.

A stylized handwritten signature in black ink, appearing to read 'Timothy Johnson'.

Timothy Johnson  
President & Chief Executive Officer  
United Way of the Bluegrass

# AT A GLANCE

2022 -  
2023

118,249  
PEOPLE SERVED

by partner agencies,  
WayPoint & 211

9,438  
People served  
through  
educational  
advancement  
programs in  
schools and  
beyond

10 COUNTIES  
SERVED

93 PROGRAMS  
FUNDED

74 PARTNER  
AGENCIES

148,297  
Volunteer Hours

served  
by UWBG  
Partners &  
Volunteers

22,957  
kids served

1,200  
Students  
served through  
Spring Break  
Project

Since the beginning of the WayPoint Initiative, our centers have provided resources for:

3  
WAYPOINT  
CENTERS =  
1,647  
Housing needs  
1,071  
Health, mental health  
and substance use  
treatment needs

665  
Employment and  
financial needs  
872  
Household  
necessities

2,606  
PEOPLE SERVED THIS YEAR

WayPoint  
CENTER

MITA  
VOLUNTEER INCOME TAX ASSIST

\$5,470,000  
TAX RETURN DOLLARS  
SECURED

4,082  
PEOPLE  
SERVED  
6,123  
HOURS

1,018  
EITC  
RETURNS  
76  
VOLUNTEERS

25,751  
CALLS  
RECEIVED

2,021  
TEXTS  
EXCHANGED

32,202  
TOTAL 211 REQUESTS

2:1:1

Sweet Dreams  
project

2,100+  
Students served through  
the Sweet Dreams Project

128  
VOLUNTEERS  
13 SCHOOL  
DISTRICTS

36  
SCHOOLS  
2 EARLY LEARNING  
CENTERS

## Thank you to our NONPROFIT PARTNERS

When we work together,  
we can make a big impact.

Thanks to the support of  
businesses and individuals  
like you, United Way of  
the Bluegrass is proud to  
support these local and  
regional partners.

- AMEN House
- American Red Cross, Bluegrass Chapter
- Apprisen
- Arbor Youth Services
- Bluegrass Council of the Blind
- Bourbon County 4-H Council
- Boy Scouts of America, Blue Grass Council
- Capital City Activity Center
- CASA of Lexington
- CASA of Madison County
- CASA of the Bluegrass
- Centro de San Juan Diego
- Child Care Council of Kentucky
- Bluegrass Community & Technical College Foundation
- Chrysalis House
- Clark County Homeless Coalition
- D.O.V.E.S. of Gateway
- DuBois Community Center
- Emergency Community Food Pantry of Franklin County
- GleanKY
- Fayette County Public Schools - First 5 Lex
- Food Pantry for Woodford County (FPWC)
- Franklin County Women and Family Shelter
- Gathering Place Mission
- Girl Scouts of Kentucky's Wilderness Road Council
- God's Pantry Food Bank
- GreenHouse17
- Hope Center
- Hope's Embrace
- Jessamine County Adult Education
- Jubilee Jobs of Lexington
- Kaden's Cause
- Kentucky Equal Justice Center
- Kentucky YMCA Youth Association
- Kings Center
- LIGHT Center Corporation
- Mentors&Meals
- Mission Lexington
- Montgomery County 4-H Council
- Nursing Home Ombudsman Agency of the Bluegrass
- Paris-Bourbon County YMCA
- Repairers Lexington
- Rowland Arts Center
- Salvation Army of Frankfort
- Simon House
- Sterling Community Food Coalition
- Telford Community Center YMCA
- Life Adventure Center of the Bluegrass
- The Foster Care Council
- The Hearing & Speech Center
- The Kentucky Center for Grieving Children and Families
- The Nest - Center for Women, Children and Families
- Thorn Hill Education Center
- Urban League
- Visually Impaired Preschool Services
- Voices of Hope
- Wanda Joyce Robinson Foundation
- Woodford County Woman's Club
- "Coats and Shoes for Kids"
- YMCA of Central Kentucky

Indicates  
WayPoint Partner



## We Will Call Her LaShawn

LaShawn walked into our Black and Williams WayPoint Center and stated she had to talk with someone, or she was going to lose everything. Flustered, she apologized for arriving so late and explained she had to make sure her daughter had someone to watch her and had to get someone to drive her to the Center. We immediately affirmed her decision to come to the Center, practiced active listening and motivational interviewing and found common ground to build rapport. As she opened up she disclosed that she had never been so low in her life and was in danger of losing her home, her car and possibly her job. She was worried about her daughter and how the stress at home was impacting her mental health and school performance. LaShawn also shared that she felt she may be depressed and was having panic attacks. After allowing the client to express her feelings and ensuring her that we could help, we were able to complete a comprehensive needs assessment. Through the assessment, we learned the client needed a birth certificate and mental health services for herself and her child, mentorship for her child, substance use disorder treatment for her adult son and employment for her adult son. She also needed budgeting skills and financial crisis intervention for her mortgage, credit card usage and her automobile loan rate.

We provided applications and instructions for getting birth certificates, and she met with our community partner, Apprisen, for assistance with budgeting, understanding and improving her credit and education about her mortgage and debt-to-income ratio – all within the same day at our Center. Together, we called Exhilarating Inc for mentorship to teenage girls and they came and met with the client the same day at Waypoint and were able to enroll the client's daughter in the program. LaShawn was able to complete a mental health screening through community partner New Vista and scheduled appointments for her and her daughter with mental health providers. She then obtained a food box and through community partner Mobile Mission, completed an application for SNAP benefits to address food insecurity. We were able to get her son into substance use disorder outpatient treatment that same day with community partner New Beginnings, provided him with hygiene items and helped him complete his application for skills training with our community partner, Opportunities for Work and Learning (OWL). We were able to address all of the family's needs in one day while at WayPoint!

Update: As of today, 3 months since we first met with LaShawn, she reports getting assistance with her mortgage and avoiding foreclosure while protecting her credit score, getting a better interest rate on her automobile and using her new budget to make sure bills are paid. She is now caught up on her mortgage payments, able to afford her new car payment and continuing therapy for depression and anxiety along with medication. Her daughter loves the teen program and is being more attentive in school. Her son completed skills training and is gainfully employed while still attending outpatient substance use disorder treatment. LaShawn shared her life is looking great and she feels like for the first time in a long time she is not living in fear of tomorrow but looks forward to each day. She also has referred several clients to WayPoint.

## WayPoint Mission:

WayPoint's mission is to create an access point for families and individuals, and to provide vital programming to people living in underserved neighborhoods and communities of color. Each WayPoint Center brings together the region's most effective nonprofit, government and business organizations to leverage their strengths against our community's biggest issues. WayPoint Centers coordinate an ecosystem of partners and programs to have the greatest impact on local families from a physical and place-based anchor in their communities. Since officially opening the doors on July 1, 2021 we have served over 3,300 individuals in our four centers.

## WayPoint Services



**In-person  
assessment  
& referrals**



**Services to  
help support  
basic needs**



**One-on-one budget,  
credit, and financial  
counseling**



**Access to mainstream  
banking products**



**Job support services  
& workforce training**



**Youth mentoring  
& tutoring**



**Healthy living events  
& information**



**Kindergarten readiness  
training for parents  
and care providers**



**No-cost income tax  
filing and preparation  
services**



# THE FUTURE OF WAYPOINT

WayPoint Centers offer a **comprehensive approach** to support that we hope to bring to other communities across the Bluegrass.

Your gifts help make this type of support available to individuals and families in Lexington communities and the city of Paris now, and other Central Kentucky locations in the future.

## OUR WORK TODAY

Upon opening the doors to the first WayPoint Center in Black and Williams Center, UWBG quickly launched two additional WayPoint Centers in the Charles Young Center in the East End of Lexington and in the Paris-Bourbon County YMCA.

Since 2021, these combined WayPoint Centers have served:



**3,366**

Individuals  
Served



**11,109**

Instances  
of service



**150**

Community  
Events Attended



- A. East End WayPoint Center at Charles Young Center
- B. Marksburg Family WayPoint Center at the Historic palmer Pharmacy
- C. West End WayPoint Center at Black and Williams Center
- D. WayPoint Center Sponsored by Keeneland at Centro de San Juan Diego
- E. Paris WayPoint Center at Paris-Bourbon County YMCA

## DID YOU KNOW?

Families who receive financial stability services + basic needs services are **3x more likely to meet their economic goals.\***

\*Source: Annie E. Casey Foundation's Centers for Working Families

# COMING SOON!



Follow this QR code to read more about this historic location!

Slated to open in December 2023, the Marksburg Family WayPoint Center at the Historic Palmer Pharmacy will replace the current East End WayPoint Center housed in the Charles Young Center. This will be the first location that is fully owned and operated by UWBG and was made possible by a generous grant from the Marksburg Family Foundation. Once renovated, UWBG will be able to move the East End WayPoint Center from one room to a new home of over 3,000 square feet. Owning this historic space and moving permanently into this neighborhood will not only allow us to serve the members of our community more effectively, but also to become a true part of the East End. We hope to build upon the trust and rapport with our new neighbors that has started in the Charles Young Center, and work with the community to ensure that everyone has the tools they need to grow and thrive right here in our neighborhood.



# 2022-2023 EVENTS



## Partner Appreciation Night at the Legends (July 19th)

Many of our 67 funded organizations gathered at Wild Health Field on July 19 to celebrate a year of partnership and enjoy a Legends game. Our hosts and longstanding partners, the Lexington Legends, provided free tickets to all of our attendees.



## School Supply Drive and Delivery (month of July)

The month of July was dedicated to collecting and distributing school supplies. Because of events like the Spelling Bee(r), collections run by our corporate partners and local churches and a generous donation from our very own Women United group, we were able to distribute thousands of crayons, pencils, notebooks, pencil boxes and more to local students through our WayPoint Centers and school-based partners.



## Century Soiree (September 16th)

Our final Centennial event, the Century Soiree, was held on September 16 at Limestone Hall in the historic Courthouse and was a hit! Guests enjoyed the 1920s-themed specialty cocktails, hors d'oeuvres and dinner from Dupree Catering and the musical stylings of The Jimmy Church Band. This event was truly the cats pajamas and a wonderful way to wrap up 100 years of service to the community and look forward to the next 100!



## Day of Action (September 23rd)

Volunteers from across 6 counties participated in our annual Day of Action event on September 23. Volunteers worked with our partner agencies to complete projects including tearing down walls at Elizabeth's Village, preparing gardens for the fall at Greenhouse17 and serving a hot meal to locals in need at the ACCESS Men's Shelter Soup Kitchen.

## Basham & Sower Memorial Golf Classic (October 17th)

Seven teams gathered at Juniper Hills Golf Course on October 17 for the second annual Basham & Sower Golf Classic to support programs in Anderson and Franklin Counties. Teams braved the chilly weather and raised over \$7,000.

## Spelling Bee(r)/Beer release (Month of November)

Mirror Twin Brewing and UWBG teamed up to create "Sweet Dreams Are Made of Beer" a specialty beer that was on tap at the brewery in November. YLS hosted their 3rd Annual Spelling Bee(r) in conjunction with the release of the beer and had 15 competitors, raising a total of \$375 for the Sweet Dreams Project. The brewery donated all proceeds from the night's sales to support the Sweet Dreams Project.

## Sweet Dreams Project 2022 (Month of December)

The 7th Annual Sweet Dreams Project kicked off in December with our largest group of students yet! Over 110 volunteers gathered to pack specialized Sweet Dreams bags for local students that included a new set of pajamas, a new book at their reading level, a toothbrush and toothpaste and nonperishable food items. This year the project served over 2,000 kids across 13 school districts in 34 schools, 3 early learning centers and 3 WayPoint Centers in our 10-county service region. Schools are chosen based on free and reduced lunch numbers and student recipients are chosen by their family resource coordinators based on known need.

The 2022 Sweet Dreams Project served the most students in our 7-year history! Thanks to our 23 sponsors and 128 volunteers, the project served over 2,100 students in 36 schools, 2 early learning centers and 3 WayPoint Centers.

## 211 Day

We spent the week leading up to 211 Day spreading the word about 211 across our social media channels and on our website. In addition, our Director of Marketing & Engagement, Jenn Goble, appeared on ABC36, FOX56 and WKYT to promote 211.







## VITA

Jordan Wilson, Manager, Financial Stability, appeared on ABC36 on February 22nd to raise awareness of UWBG's VITA program and encourage individuals who earned \$62,000 or less last year to come and have their taxes prepared, at no cost to them, while simultaneously accessing tax credits and other income supports often missed by paid preparers.

## Palmer Pharmacy Key Exchange

UWBG's team ceremonially received the keys to the Palmer Pharmacy in a press conference held on February 15 in front of the Palmer Pharmacy in the East End community of Lexington. Since early 2021, we have been working with the Lexington Fayette Urban County Government (LFUCG) to secure a new space for the East End WayPoint Center, currently located in the Charles Young Center. This space is the former Palmer Pharmacy, a building with a rich history located in the heart of Lexington's East End. Due to the hard work of many staff members, we have secured funding to completely renovate this space and create the new "Marksbury Family WayPoint Center in the Historic Palmer Pharmacy".

This is an exciting time to be part of Team UWBG team! With the expansion of this Center from one room to an entire building, we will be able to serve more individuals in the community and put into place some innovative new projects. This new space will be a gathering place for all members of our community and will include meeting rooms, a commercial kitchen and so much opportunity to expand our work.

## VITA Super Saturday (March 11th)

UWBG hosted its first in-person Volunteer Income Tax Assistance (VITA) Super Saturday tax preparation event since 2020. Volunteers completed taxes for eligible individuals on Saturday, March 11 at the Lexington Senior Center. 211 representatives and nonprofit partners were onsite as well to offer assistance and inform individuals about their services.

## Read Across the Bluegrass (March 24th)

45 volunteers joined UWBG at the Fayette County Public Schools administrative building on March 24 to flex their creative muscles and pack over 1,100 snack and book bags for local students. Volunteers decorated bags with encouraging quotes, silly jokes and skillful artistry, then packed them with nonperishable snacks and a new book. These bags were then distributed to elementary students across the 13 school districts UWBG serves.

## Women United Summit (March 29th)

120 attendees gathered for the 2023 Women United Summit on March 29. Attendees spent time learning about the foster care system in Kentucky and how it interacts with the school system. Speakers included Stephanie Spires of Spires Strategies, Judge Libby Messer, T.C. Johnson with Fayette County Public Schools, Cassie Slone of the Foster Care Council, Tamera Vest of Kentucky Youth Advocates and Keisha Lyon of Voices of the Commonwealth. In the words relayed by our keynote speaker, Stephanie Spires, "Every kid is ONE caring adult away from being a success story."

## 2023 Golf Classic Centennial Golf Presented by Lexmark

United Way of the Bluegrass' Centennial Golf Scramble presented by Lexmark was held June 26th at Champion Trace Golf Club in Jessamine County. A total of 33 foursomes enjoyed a round of golf, luncheon, silent auction and reception, raising over \$20,000. We appreciate the support of our sponsors and players!





# Thank You to our Event Sponsors!



## CENTURY SOIREE



Caryl Pfeiffer



## SWEET DREAMS PROJECT:



Caryl Pfeiffer



## DAYS OF ACTION



## CENTENNIAL GOLF CLASSIC:



Valerie Marshall



## BASHAM & SOWER MEMORIAL GOLF CLASSIC:



Council of Archivists

# TOP 25 SUPPORTERS

We recognize these outstanding partners for their employee and corporate contributions as our 2022-2023 TOP 25 SUPPORTERS.



## Board of Directors

**Mary Meixelsperger** *Valvoline, Inc.*  
Chair

**Dr. Kenneth Jones** *University of Kentucky, Inc.*  
Vice Chair

**Kathy Jaeger** *Dean Dorton*  
Treasurer

**Timothy Johnson** *United Way of the Bluegrass*  
Secretary; Chief Executive Officer

**Valerie Marshall** *Fifth Third Bank of Kentucky, Inc.*  
Immediate Past Chair

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**Anne Brooks** *PricewaterhouseCoopers LLP*

**Craig Daniels** *Community Volunteer*

**Robert Duncan Jr.** *Dinsmore & Shohl, LLP*

**Brandon Eason** *Stock Yard Bank & Trust*

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**Kyle Murray** *Lexmark*

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**Dr. Steven Yates** *University of Kentucky*

**Cathy Jennings** *Frankfort Plant Board*

**Jade Miles** *Lexmark*

**Brien Lewis** *Transylvania University*

# Leadership Giving

Thank you to all United Way of the Bluegrass donors.  
Your gift helps move our community forward.

## Henry K. Milward Society

The Marksbury Family Foundation  
Jeff and Mary Meixelsperger

Sam and Beth Mitchell  
Rooke Family Foundation

## Alexis de Tocqueville Society

Steve South and Sue Van Patten  
Dr. John W. Gilbert  
Drs. Eli and Mary Lynne Capilouto  
Bob and Caryl Pfeiffer  
Tonya H. Jackson

Jo Ann Czekalski and Jim Stokes  
The Caller Family: *Steve, Susan, Bret,  
and Allison*  
Mr. Steven M. Lee

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## Gold Feather

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Mr. John E. Salsman III  
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Henry K. Milward Society: \$25,000 and above  
Alexis de Tocqueville Society: \$10,000-\$24,999  
Builders Society: \$5,000-\$9,999  
Gold Feather: \$2,000-\$4,999  
Silver Feather: \$1,000-\$1,999

## Gold Feather (continued)

The Hurt Family  
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# Leadership Giving

## Silver Feather (continued)

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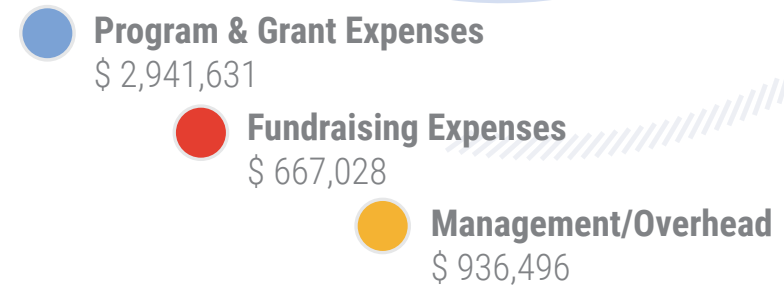
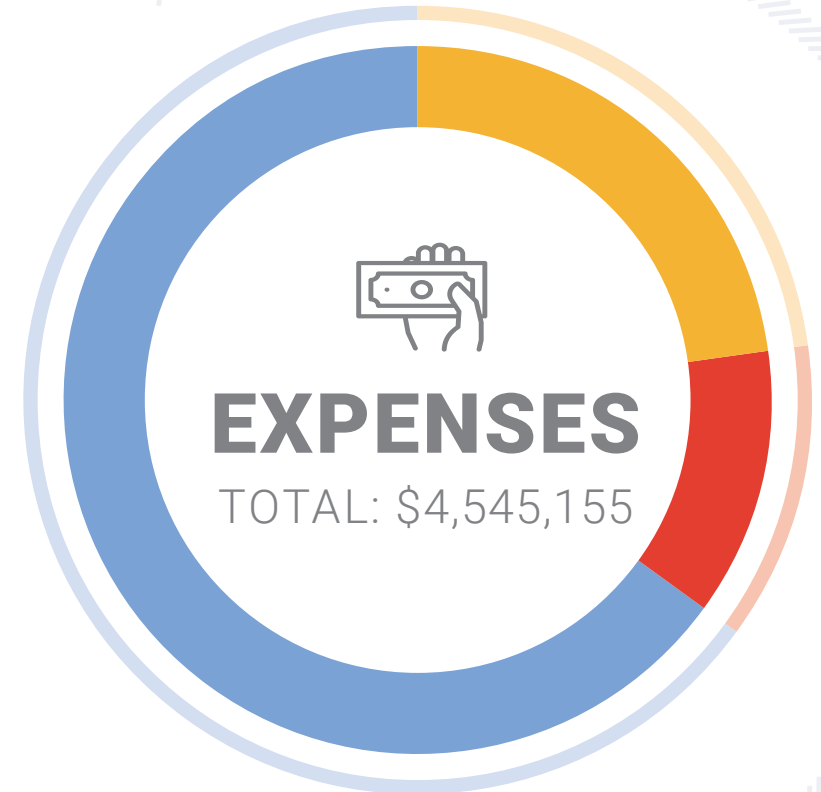
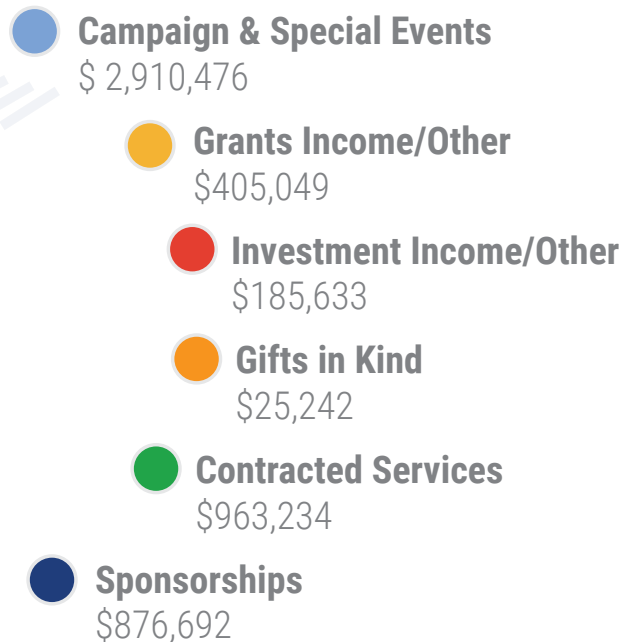
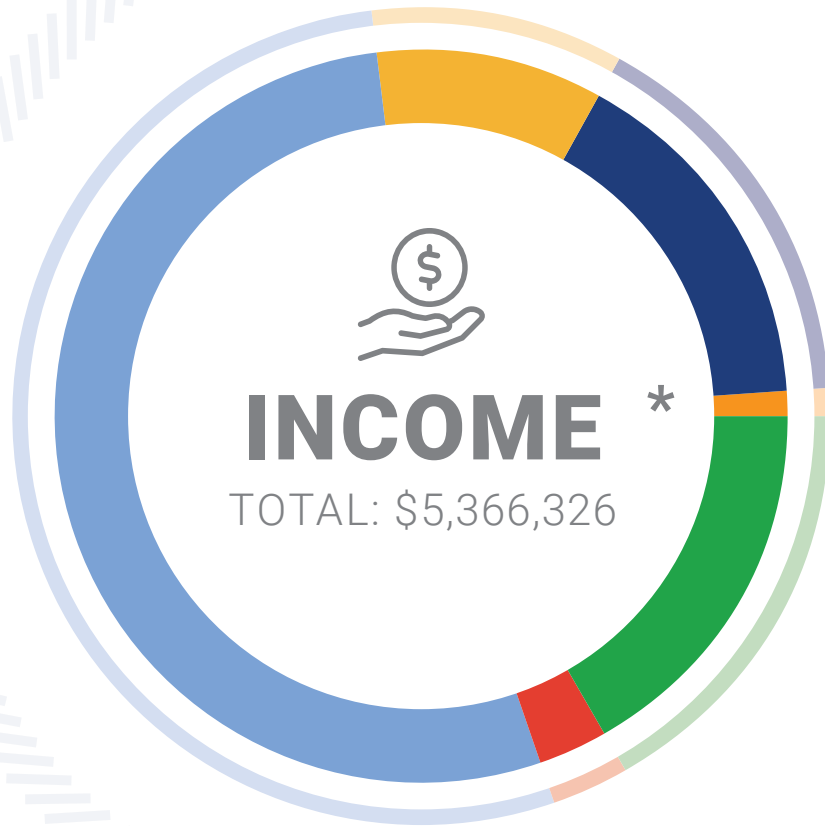
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Charles Steele, Jr. and Family

## Silver Feather (continued)

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Michael Taylor  
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Rosemary C. Cullivan  
Byron Costner  
Alann and Kristi Karow  
Bhaskar Gopalanarayanan and Vasundhara  
Parameswaran  
Bill and Kitty Craycraft  
Bill and Margie Wilson  
Bud and Leslie Watson  
Calvin Murphy  
Christine Garcia and Barry Chase  
Dave Murphy  
Dr. and Mrs. James P. Adams  
Herbert C. Finnen  
Jacobus M. Ockers  
Jade Miles  
Jay Doster  
Jeri Isbell  
John and Kathy Plomin  
John and Magdalene Stewart  
Lynn Triplett  
Matt Martinkovic  
Phil and Connie Harmon  
Robert and Barbara Twist  
Sandy Davis Weaver  
William and Charlotte Lubawy  
Mrs. Kelly E. Inabinet  
Ms. Jennifer D. Denton  
Mayor Linda S. Gorton

Dr. Karl W. Lange  
Jim Thomas  
Andy and Lee Walker  
Anne E. Nash and John T. Newton, Jr.  
Barbara Dixon and Addison Parker  
Brenda and James Rogers  
Jim and Laurie Herchenroeder  
Jim and Peggy Baldridge  
Karen Koberg  
Ray and Tiffany Daniels  
Scott Douthett  
Ms. Laura M. Jones  
Scott King  
Dr. John Patterson  
Dr. Monica Hall Robertson  
Ms. Loretta S Sims  
Mrs. Lee L. Walker  
Mr. Gary Zheng  
Mr. Robert E. Klier  
Stephanie Clarke  
Mr. Robert R. Marshall

# Financials 2022-2023



\* Income figure does not take into account revenue received in FY22 that was reported pledged in the prior fiscal year.



**United Way  
of the Bluegrass**



# It's time to **LIVE UNITED**

**"We will continue to build a better, stronger  
Bluegrass where all are welcome."**

—Timothy Johnson  
*United Way of the Bluegrass President and CEO*

## JOIN US.

Change doesn't happen alone.

[UWBG.ORG/LIVEUNITED](https://UWBG.ORG/LIVEUNITED)





**Diversity, Equity, Inclusion and Belonging** are at the heart of what it means to LIVE UNITED. United Way of the Bluegrass is committed to becoming a diverse and inclusive organization that strives for equity and equal opportunity in all we do to better serve our community.



**United Way  
of the Bluegrass**

**LIVE UNITED**