MILESTONES

1961 – 1979 VOLUNTEER BEGINNINGS

• **1969**: 31 volunteers serving as Directors, annual administrative costs 5.5% of dollars raised $34,847

• **First Five Funded Programs**: Girl Scouts, Boy Scouts, Red Cross, Retarded Children’s Organization (known today as ARC), and WC 4-H Club

• **1974**: Community Child Care Center admitted to United Givers Fund (UGF) with $10,000 in funding

• **1976**: UGF hired the first part-time staff

• **Campaign Revenue Growth**: $20,071 to $133,800, 67% increase
1980 – 2000 BECKY DARBY, EXECUTIVE DIRECTOR

COMMUNITY INVESTMENTS
• Admissions and Allocations Committee established; Funding recommendations made by committee of volunteers and submitted to Board of Directors for approval; First external audit conducted
• New Nonprofit start up grants and partners
  • Boys & Girls Club of Williamson County
  • Community Housing Partnership
  • Community Child Care Center given grant to expand program to include infants
  • Mercy Children’s Clinic
  • Bridges
  • Friends Learning in Pairs (FLIP)
• 1982: Nineteen agencies receive funding; campaign raises $220,981
• 1988: Two new agencies include Williamson County Literacy Council and College Grove Senior Center
• 1993: Williamson County included with Regional Needs Assessment identifying priority needs in Williamson County: drug and alcohol abuse treatment, inadequate and affordable housing, lack of affordable child care
• 1998: Partner agencies total 30 and services are provided 66,781 times; campaign associate added to staff

COMMUNITY ENGAGEMENT
• 1987: first Day of Caring held in Williamson County – United Cities Gas Company (now Atmos Energy) employees volunteered on projects at WAVES Early Intervention Program

CAMPAIGN
• 1988: first Loaned Executive assists with campaign; part-time secretary added to staff
• 1989: Bill King serves as Campaign Chair with county-wide kickoff held in Maryland Farms; campaign achieves 29% increase
• 1990: first million dollar campaign chaired by Williamson Medical Center’s Administrator, Ron Joyner; leadership giving continues as fastest growing component of campaign
• 1997: FISI Madison achieves first-ever $200,000 campaign by a Williamson County business (16% over their goal); UWWC campaign reaches $2 million mark
• Administrative costs at 11.4%
• Campaign Revenue Growth from 1980 - 1999: $136,500 to $2.39M
2000 – 2012 ANN BUCHANAN, PRESIDENT/CEO

DISASTER ASSISTANCE
• 2001: Collection point for those wishing to donate to the Sept 11th Fund in support of relief, recovery, and rebuilding efforts for those affected by the terrorist attacks
• 2005: Collection point for donations to the Hurricane Katrina Response Fund in support relief, recovery, and rebuilding efforts for those affected
• 2008: Helped form Williamson County Long Term Recovery Committee to coordinate continued relief efforts, assisted in creating and implementing a voucher system for tornado victims to use with local businesses and service providers
• 2010: Assisted with flood recovery efforts in Williamson County

COMMUNITY INVESTMENTS (AKA ALLOCATIONS)
• 2005: County-wide Needs Assessment conducted by Middle Tennessee State University in collaboration with Williamson County and City of Franklin governments
• 2005: funded tuition for director of Williamson County Child Advocacy Center to attend Forensic Interview School
• 2007: assist with funding to hire Development Director for CASA of Williamson County and transportation needs for TRAC
• 2009: cooperated along with other non-profits and agencies to form and provide initial funding for Helping Hands Food Pantry and Resource Center in Fairview
• Tucker’s House – start-up funding
• Implementation of Outcome Measurements

COMMUNITY IMPACT & ENGAGEMENT
• 2007: VITA program begins in Williamson County—first year 78 returns resulting in $37,725 in federal refunds coming back to county residents
• 2008: first Born Learning Trail installed at Franklin Recreation Complex in collaboration with Williamson County Parks & Recreation
• Initiatives
  • Medius – 2002 launched young professionals initiative
  • Youth Advisory Council – 2006 launched a youth initiative
  • Patricia Hart Society - 2005 launched a women's initiative
• Volunteer Center – Rick Jansen, Emeritus Board Member, worked as a volunteer to establish the Volunteer Center. He volunteered roughly 20 hours a week for five years.

CAMPAIGN
• Campaign Revenue Growth from 2000 - 2011: $2.56 to $3.77M
COMMUNITY IMPACT & ENGAGEMENT

- **2014:** Community Needs Assessment highlighted two significant gaps in services. The lack of available mental health services in the outer parts of the county and the lack of knowledge of where to go when/if you have a need. As a result we:
  - Collaborated with Mercy Community Healthcare to launch a school-based Behavioral Health Pilot Program 2016-2018.
  - Created a Day of Action volunteer opportunity to distribute 211 Helpline information.
- **2015:** Growth of Raise Your Hand expanded to 2nd grade in afterschool tutoring program (originally 3rd & 4th grade only). In 2017, expanded tutoring to 1st grade.
- **2012-2019:** VITA put $2.63M back into the community through income tax refunds by providing Free Tax Prep to individuals in our community.

COMMUNITY INVESTMENTS (AKA ALLOCATIONS)

- **2017:** Community Investment Process moved to standardized outcome measurements for the three focus areas Health, Education and Financial Stability. In addition to the implementation of an electronic program grant application.
- **New Nonprofit Partners**
  - **2013:** Mercy Community Healthcare partnership grandfathered because of merger with Grace Medical Clinic - $21,000
  - **2014:** Tucker’s House - $10,000
  - **2014:** Begin Anew Middle TN - $20,000

ENDOWMENT

- **2016:** Received a generous endowment gift of $1,000,000. After a feasibility study, this gift launched a $5,000,000 Endowment Campaign.
- **2018:** We received several generous endowment gifts totaling $801,000. As of June 30, 2019, the total endowment revenue is $1.8M.

MARKETING/COMMUNICATIONS

- **2018:** Implementation of United Way Worldwide (UWW) Digital Services Program and won back 519 lapsed donors; as a result, generated over $99,000 in revenue.

FINANCE

- **2018:** Campaign processing included donor designations to over 620 agencies and United Ways.
- 100% of the communications regarding pledge acknowledgements and designation payments to these organizations done electronically. Averaged 95% of designation payments made electronically.

CAMPAIGN

- Campaign Revenue Growth from 2012 - 2018: $3.98 to $4.73M
- **2019:** Tractor Supply Company (Greg Sandfort CEO) celebrates first Million Dollar Campaign in UWWC history

MERGER

- In 2018, because of 1) joining other United Ways in shifting to digital communications, 2) the continued expansion of work-live patterns between Nashville and Williamson County, and 3) the rapid growth in our geographic region, we (President/CEO, CFO and Executive Committee) felt it was time to explore the possibility of merging with United Way of Metropolitan Nashville (UWMN). After numerous Board Merger Committee meetings, UWWC and UWMN Board of Directors approved the merger. Official merger date October 31, 2019.
HOW YOUR PARTNERSHIP CHANGES LIVES
Impact at a Glance

Success Story

HOW AMY FOUND HERSELF AGAIN

Amy lived in a constant state of fear. The man who was her husband called her stupid and other names you wouldn’t say in polite company. She was hit, kicked and thrown against walls. The final straw was a fight where he hurt her in front of her then 7-year-old son. The fear in her son’s face was awful. Then someone told her about Bridges Domestic Violence Center. At the shelter, she had a support system and people who cared. The family was fed and clothed. Amy attended counseling. She learned to ride the trolley to work and grocery shopping. She began to laugh and have fun. “I know if I hadn’t had Bridges, I would have gone back to him,” says Amy. “My children, even though they left everything behind, are happier and love our new life. Bridges helped me find myself again.”

Accelerating Education

91%
of 95 children were proficient on kindergarten readiness assessment

$342,014 INVESTED

4,940children/youth received mentoring, tutoring or advocacy support

71%of children/youth reached milestones and progressed at age appropriate levels

Expanding Financial Stability

11,511individuals accessed job skills training, food, supplies, or financial resources

$226,815 INVESTED

4,287individuals received help to remain in their homes or find shelter

36%of 329 individuals achieved their employment goals

Advancing Health

12,528individuals accessed medical, dental, mental healthcare, and/or received counseling or therapy

$1,301,171 INVESTED

86%of children/adults had their immediate health issues addressed

4,614individuals in crisis reported an increase in self empowerment, personal coping skills & safety
UNITED WAY OF WILLIAMSON COUNTY 2019 BOARD

Executive Committee
Board Chair: Eric Stuckey, City of Franklin
Board Chair Elect: Kristi Morrow, Mainsail Group
Past Board Chair: Kelly Meyers
Campaign Chair: Ross Taubman, PICA, A ProAssurance Co.
Campaign Chair Elect: Tom Sayers, Publix Supermarkets
Finance Chair: Blake Stinnette, PwC, LLP
Strategic Initiative Chair: Denise Goodwin, Williamson County Schools
Marketing Chair: Renee Drake, First Horizon Bank
Community Investment Chair: Kristi Morrow
Member-At-Large: David Pickett, PwC, LLP

Board Members
Sherry Anderson, Williamson County – Register of Deeds
Paul Bolin, Williamson Medical Center
Terry Busing, Belk Department Store
Brenda Cronk, Community Health Systems
Kevin Dobbs, Atmos Energy Corporation
Jeff Drummonds, LBMC
Brian Dunston, Merrill Lynch Wealth Management
Bob Fick, Enterprise Holdings
Greg Hewitt, Balanced Growth Enterprises
Marty Martin, retired, Regions Bank
John Mize, SVMIC
Herman Moncrief, Moncrief Consulting
Ben Parrish, Tractor Supply Company
Pete Powell, Corizon Health
Hank Russell, retired, Vanderbilt University Medical Center
Jeff Smith, Franklin Synergy Bank
Raybon White, General Motors
Terri Welch, Nissan North America
Kenny Young, Buerger, Moseley & Carson, PLC

Board Merger Committee
Kelly Meyers
Kristi Morrow
Blake Stinnette
Eric Stuckey
Michael Wiechart
Kenny Young (Legal Counsel)
Pam Bryant, President & CEO
Pat Hansberry, Executive Administrative Assistant/Office Manager

Angela Stafford, Chief Financial Officer
Bev Roberts, Finance Specialist
Lesley Costello, Finance Associate

Elizabeth Mefferd, VP Resource Development & Donor Relations
Anne Mathis, Director, Resource Development & Donor Relations
Joy Lehmann, Director, Resource Development & Planned Giving
Heather Hill, Manager, Resource Development & Donor Relations
Carla Arnette, Seasonal Resource Development Specialist
Adam Wilczek, Director, Major Gifts & Planned Giving

Cheryl Stewart, VP Marketing & Communications
Lauren Curry, Marketing & Communications Specialist
Elizabeth Spence, Database Administrator

Im Cashen, Free Tax Prep Manager & Finance Associate
Sonya Johnson, Education Engagement Manager
Rebecca Webb, Volunteer Center Program Manager & Patricia Hart Society Liaison
Rick Jansen, Volunteer Center Liaison
Kim Tyner, Williamson County Anti-Drug Coalition Director
Trey Dees, WCADC Regional Overdose Prevention Specialist (ROPS)
May 1, 2019

Pam Bryant
United Way of Williamson County
209 Gothic Court
Suite 107
Franklin, TN 37067

Dear Pam Bryant:

On behalf of Charity Navigator, I wish to congratulate United Way of Williamson County on attaining the coveted 4-star rating for demonstrating strong financial health and commitment to accountability and transparency.

The nonprofit sector is advancing and expanding. As our organizations evolve, so do the desires and interests of our supporters. Astute donors are yearning for greater accountability, transparency, and for concrete results from us. With more than 1.5 million American charities, Charity Navigator aims to accentuate the work of efficient and transparent organizations. The intent of our work is to provide donors with essential information to give them greater confidence in both the charitable decisions that they make and the nonprofit sector.

Based on the most recent information available, we have issued a new rating for your organization. We are proud to announce United Way of Williamson County has earned our eighth consecutive 4-star rating. This is our highest possible rating and indicates that your organization adheres to sector best practices and executes its mission in a financially efficient way. Attaining a 4-star rating verifies that United Way of Williamson County exceeds industry standards and outperforms most charities in your area of work. Only 4% of the charities we evaluate have received at least 8 consecutive 4-star evaluations, indicating that United Way of Williamson County outperforms most other charities in America. This exceptional designation from Charity Navigator sets United Way of Williamson County apart from its peers and demonstrates to the public its trustworthiness.

*Forbes, Business Week, and Kiplinger's Financial Magazine*, among others, have profiled and celebrated our unique method of applying data-driven analysis to the charitable sector. We evaluate ten times more charities than our nearest competitor and currently attract more visitors to our website than all other charity rating groups combined, thus making us the leading charity evaluator in America. Our data shows that users of our site donated more than they planned to before viewing our findings, and in fact, it is estimated that last year Charity Navigator influenced approximately $10 billion in charitable gifts.

Your achievement and the 4-star rating will enhance your organization's fundraising and public relations efforts. Our favorable review of United Way of Williamson County's financial health and commitment to accountability & transparency is now visible on our website.

We wish you continued success in your charitable endeavors.

Sincerely,

Michael Thatcher
President and CEO
United Way of Williamson County
Accredited Charity with
Better Business Bureau Wise Giving Alliance

The BBB is an affiliate of the Council of Better Business Bureaus, Inc. owner of various trademarks, including “BBB,” “Better Business Bureau,” the “BBB torch logo” and a national charity seal.

BBB WGA evaluates national charities for compliance with its holistic accountability standards and is authorized to license the Seal, designed to assist donors in making informed giving decisions, to charities that meet those standards.

In 2018, United Way of Williamson County became an accredited charity.