



the annual

UNITED WAY  
**AWARDS OF  
XCELLENCE**

WEDNESDAY **JUNE 1** 2011

# UNITED WAY–THOMAS JEFFERSON AREA BOARD OF DIRECTORS

## EXECUTIVE COMMITTEE

### Chair of the Board

Margery Daniel, Ph.D., LCSW  
*Licensed Clinical Social Worker*

### Immediate Past Chair of the Board

Mark Giles  
*Chairman, Virginia National Bank*

### Operations Chair

Brad Groff  
*Chief Operating Officer, Blue Ridge Numerics*

### Endowment Trustee Chair

Peter Brooks  
*Partner, Cornerstone Partners LLC*

### Audit Committee Chair

Russ Bell  
*Managing Director, Silvercrest Asset Management Group, LLC*

### Campaign Chair

Brad Ramsey  
*Vice President and General Manager  
Charlottesville Newsplex*

### Campaign Special Projects

Liza Borches  
*President, Volvo of Charlottesville*

### Program Review and Funding Chair

Alison DeTuncq  
*President, UVA Community Credit Union*

### Smart Beginnings Liaison

Eric Johnson  
*Principal, Signature Financial Management*

### Historian

Jim Kennan  
*Retired*

### Self-Sufficiency Task Force Chair

Blair Kelly  
*Publisher, The Hook*

### Member At Large

Dick Brownlee  
*Professor of Business Administration  
Darden School of Business*

### Member At Large

Peggy Echols  
*Vice President-Operations  
State Farm Insurance Companies*

### Member At Large

Dan Goodall  
*Trust and Investment Officer, VNB Trust*

### Member At Large

Jay James  
*Program Director for WINA and WVAX  
Charlottesville Radio Group*

### Member At Large

PK Kamath  
*Senior Vice President, CB Richard Ellis*

### Member At Large

Ray Mishler  
*Vice President, Martha Jefferson Hospital*

### Cathy Train

*President, United Way-Thomas Jefferson Area*

## BOARD OF DIRECTORS

Guy Babineau  
Russ Bell \*  
Spencer Birdsong  
Liza Borches  
Bill Bradley  
Peter Brooks  
Suzanne Brooks \*  
Dick Brownlee  
Lisa Cannell  
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Mike Chinn  
Carol Clarke \*  
Deborah Conway \*  
Chris Craytor  
Margery Daniel  
Alison DeTuncq  
Charles Du Bose  
Peggy Echols

Bryan Elliott \*  
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\* Active Life Members

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The United Way Awards of Excellence were created five years ago to recognize, celebrate, promote and inspire excellence in nonprofit leadership and board governance.

Tonight we celebrate outstanding staff leaders and boards of our nonprofit community and shine a light on their dedication and commitment. We are truly energized by their passion and their work that changes lives.

Having had the joy of honoring our nonprofit executive directors for four years, a new focus this year is to recognize an outstanding staff member in a local nonprofit. The award is so named the Staff Leadership Award and honors those who have embraced and lead changes that have enabled organizations to weather the times, strengthen their sustainability and accomplish their missions. These individuals inspire us with their dedication.

On behalf of the United Way Board of Directors and Staff, we are honored to present the Awards of Excellence and spotlight the outstanding staff leaders and boards of our nonprofit community who *Live United* every day.

Cathy Smith Train  
President  
United Way-Thomas Jefferson Area

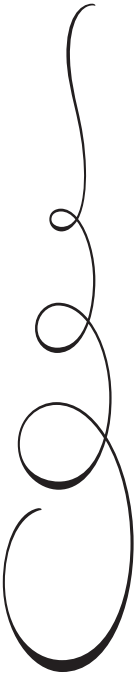
Margery Daniel  
Chair, United Way Board of Directors  
Ph.D., Licensed Clinical Social Worker

## WHAT DOES IT MEAN TO LIVE UNITED?

When we as individuals think outside ourselves, we have the power to facilitate change. When we think of others' lives as linked to our own, our compassion grows. When we reach out a hand to one, we influence the condition of all. We build the strength of our families. We bolster the health of our communities. And we change the lives of those who walk by us every day. That is what it means to *Live United*.

While the mission of United Way-Thomas Jefferson Area has evolved since our founding in 1943 by the Charlottesville Regional Chamber of Commerce as the Charlottesville and Albemarle War and Community Fund, our local leadership and purpose have not. We continue to *Live United* by offering opportunity and hope through strategic grant-making, offering direct outreach programs, and advocacy. We are proud to partner with community leaders, nonprofit organizations, volunteers and businesses to make an impact in four areas: Successful Kids in Strong Families; Access to Health and Wellness; Achieving Self-Sufficiency; and Strengthening Community.

**GIVE. ADVOCATE. VOLUNTEER. LIVE UNITED.**



# EVENING PROGRAM

## **Welcome**

### **Cathy Smith Train**

*President, United Way-Thomas Jefferson Area*

### **Peggy Echols**

*Vice President-Operations, State Farm Insurance Companies*

## **Dinner**

## **Opening Remarks**

### **Margery Daniel**

*Chair, United Way-Thomas Jefferson Area Board of Directors  
Ph.D., Licensed Clinical Social Worker*

## **Presentation**

### **United Way Award of Excellence in Nonprofit Board Governance**

#### **The Honorable Gerald L. Baliles**

*Director of the Miller Center of Public Affairs*

*Chair, United Way Award of Excellence in Nonprofit Board Governance Panel*

#### **Steve Krohn**

*Managing Director, Virginia National Bank*

## **Presentation**

### **United Way Award of Excellence in Nonprofit Staff Leadership**

#### **Renée Grisham**

*Chair, United Way Award of Excellence in Nonprofit Staff Leadership Panel*

#### **Phil Shiflett**

*Chief Executive Officer, Hantzmon Wiebel LLP*

## **Closing Remarks**

### **Margery Daniel**

*Thank you to Rivanna Natural Designs  
for the award plaques given out tonight.*

# Virginia National Bank would like to congratulate

THE FINALISTS FOR THE UNITED WAY AWARD OF  
EXCELLENCE IN NONPROFIT BOARD GOVERNANCE

*Center for Nonprofit Excellence*

*PACEM*

*Senior Center*

AND WOULD LIKE TO THANK  
THE DISTINGUISHED PANEL OF JUDGES

*The Honorable Gerald Baliles, Chair*

*Betsy Casteen*

*Steve Krohn*

*Steve McLean*

*Julie Stamm*



**UNITED WAY AWARD OF EXCELLENCE  
IN NONPROFIT BOARD GOVERNANCE**

*Underwritten by Virginia National Bank*

*B*ehind every effective nonprofit organization is a dedicated group of volunteers serving on its board of directors. Ideally, they bring an array of talents and experience to help guide the organization and its professional staff to best achieve its mission. A strong board of directors establishes effective management policies and procedures and assures adequate human and financial resources for the organization. A highly effective board also provides active program oversight and financial accountability, and promotes the organization throughout the community.

Past Recipients

- 2007 Charlottesville Free Clinic  
Building Goodness Foundation – Inspirational Award
- 2008 OAR/Jefferson Area Community Corrections
- 2009 Piedmont Court Appointed Special Advocates
- 2010 Children, Youth & Family Services



**UNITED WAY AWARD OF EXCELLENCE  
IN NONPROFIT BOARD GOVERNANCE PANEL**

The Honorable Gerald L. Baliles, Chair  
*Miller Center of Public Affairs*

Betsy Casteen

Steve Krohn  
*Virginia National Bank*

Steve McLean  
*McLean Falconer Realtors*

Julie K. Stamm

## **UNITED WAY AWARD OF EXCELLENCE IN NONPROFIT BOARD GOVERNANCE**

### **FINALIST**

#### **The Center for Nonprofit Excellence**

The Center for Nonprofit Excellence (CNE) was formed as a local resource center for area nonprofits. Its board of directors has helped it transition from a start-up nonprofit to an organization with 269 dues-paying members who take advantage of CNE's tools, training and resources for nonprofits. The board has strategically focused the capacity-building activities of the organization in four principal areas: nonprofit management, governance, leadership development and technology.

As part of its oversight, the CNE board has been integrally involved in the effort to effectively align volunteer and professional staff resources with its mission and has adopted an operating reserve policy. New board members are invited to join based on a rigorous analysis of the specific needs of the organization. They undergo an orientation and are provided with board mentors and regular board training. Each board member creates individual goals for board service. In addition, the board conducts an annual self-evaluation.

A founding principal for CNE and its board has been to demonstrate the due diligence that they encourage and equip other organizations to adopt. Such policies and procedures include internal financial controls, a comprehensive employee handbook and a board conflict of interest policy. These policies can then be shared with area nonprofits enhancing their own organizational capabilities.

## **UNITED WAY AWARD OF EXCELLENCE IN NONPROFIT BOARD GOVERNANCE**

### **FINALIST**

#### **PACEM**

PACEM's mission is to engage the faith community of the greater Charlottesville area in providing shelter, compassionate support, and access to services for people who are homeless. The board consists of members ranging from the clergy, professionals in rehabilitation services and law enforcement, and the ex-homeless. At a board retreat last year, the members affirmed the need to have a low-barrier shelter for those who cannot access other programs in our community, and the need to have strong assessments of those who come seeking shelter through the use of a centralized intake.

The board remains disciplined in maintaining focus on PACEM's mission but without constantly increasing services. Instead, they look to community resources both for advocacy efforts and for overflow shelter. Their budget of \$250,000 is the same as it was three years ago, despite a 30% increase in services provided. This increase in guests during the past two years led the board to establish a firm shelter capacity and an overflow plan with the Salvation Army, which provides a warming room.

PACEM board members visit shelter sites once a week, actively participating in hosting the homeless in church locations. They give community presentations to solicit financial support of the organization. PACEM has been able to maintain adequate funds for sheltering operations for more than 150 winter nights. Board committees have created a volunteer training manual, redrafted the personnel policy manual and reconfigured all staff responsibilities and job descriptions. The board has worked with the executive director to establish new staff positions that more efficiently meet the level of service required with the current larger client base.



## **UNITED WAY AWARD OF EXCELLENCE IN NONPROFIT BOARD GOVERNANCE**

### **FINALIST**

#### **The Senior Center**

The Senior Center's mission to "involve, enrich and empower seniors in our community" drives its board in overseeing the Center's 100 recurring programs, plus special offerings and community partnerships. Programs are reviewed annually to ensure they remain effective and efficient. The Center's philosophy is to develop a culture that allows seniors to do for themselves, for each other and for our community. The Center has a small staff, thanks to 500 volunteers who help develop and manage programs and operations.

The Senior Center has never received government funding, which has encouraged an entrepreneurial spirit that has created a diversified funding stream. Half of the Center's revenue comes from philanthropy and half from earned income. The organization does not carry debt and has built a prudent reserve which has helped in the recent economic downturn.

The board has a strong history of embracing change: three years ago, the board supported a plan to implement a new membership scan card system to help with program evaluation. The system has been highly successful and has provided data on program participation that is useful for future planning. The Senior Center is one of the few in the country to have achieved national accreditation, and on a more local level, it received the 2010 CYFS Family Friendly Employer award.

# HANTZMON WIEBEL LLP

Certified Public Accountants



## CONGRATULATES

Claudette Greene, *PACEM*  
Ethan Tate, *Building Goodness Foundation*  
Debbie Taylor, *JAUNT*

nominees for the

## United Way Award of Excellence in Nonprofit Staff Leadership

Hantzmon Wiebel appreciates the  
thoughtful deliberation of our panel

Renée Grisham, Chair  
Stewart Gamage  
Mike Geismar  
Bob Gibson  
Bruce Murray

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providing solutions  
*creating value*

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**UNITED WAY AWARD OF EXCELLENCE  
IN NONPROFIT STAFF LEADERSHIP**

*Underwritten by Hantzmon Wiebel LLP*

This award is given to an outstanding staff member of a nonprofit organization who shows exemplary commitment and effectiveness in achieving the mission of his or her organization, inspiring us with their dedication, empathy, creativity and resourcefulness.

Past Recipients

2007 Gordon Walker  
JABA

2008 Patricia Smith  
OAR/Jefferson Area Community Corrections  
Theresa Tapscott  
Albemarle Housing Improvement Program

2009 Charles McElroy  
WorkSource Enterprises

2010 Peter Thompson  
Senior Center



**UNITED WAY AWARD OF EXCELLENCE  
IN NONPROFIT STAFF LEADERSHIP PANEL**

Renée Grisham, Chair

Stewart Gamage  
*The Morven Project, UVa Foundation*

Mike Geismar  
*Quantitative Investment Management*

Bob Gibson  
*Sorenson Institute for Political Leadership*

Bruce Murray



## **UNITED WAY AWARD OF EXCELLENCE IN NONPROFIT STAFF LEADERSHIP**

### **FINALIST**

#### **Claudette Greene, PACEM**

As the Shelter Director at PACEM, Claudette Greene has learned to balance compassion with logistics. After working a full-time job during the day, in the evening Claudette oversees both employees and volunteers to meet PACEM's mission of providing shelter, compassionate support and access to services for people who are homeless.

On nights when those requesting shelter exceed capacity, Claudette is required to be "firm, fair and consistent, with an intimate knowledge of the cultural expectations of guests and to gauge the situation where the choice might be a firm word or a listening ear." She has the unenviable task of determining whether a guest has a back-up plan to stay with a friend for the night, or if the warming room at the Salvation Army would serve to get the guest through the night.

Claudette is a model of the art of listening and treating others with respect, even during the most stressful moments of crisis or despair. She advocates for the guests of the shelter, helping them receive the benefits for which they qualify and which may set them on the road to self-sufficiency. "At PACEM, we are inspired by Claudette, not only in delivering our mission of shelter and compassion to those without other options, but also in the lessons about how we treat every person in our community as a person with great possibilities."



## **UNITED WAY AWARD OF EXCELLENCE IN NONPROFIT STAFF LEADERSHIP**

### **FINALIST**

#### **Ethan Tate, Building Goodness Foundation**

As the Director of Volunteer Programs at the Building Goodness Foundation (BGF), Ethan Tate has to balance the management of 375 skilled construction volunteers with projects that are local, national and international. He recruits, places, manages and follows up with all of BGF's volunteers, combining the use of technology along with warm human contact to inspire them and coordinate their work.

Ethan initiated the organization's Local Fall Building Project, which renovates the facilities of four to five local nonprofit agencies each year. In addition, he is the BGF leader and point person for a springtime collaboration with students from UVa's Darden School in renovating substandard homes for local families. The number of homes has increased each year: in 2011, 16 homes were renovated.

BGF has had projects in Haiti for several years. After the January 2010 earthquake, the organization undertook six building projects to replace schools and support community churches and medical facilities. Ethan has made three trips to Haiti, coordinating the travel plans for more than 100 volunteers. He also acts as group trainer and places volunteers at appropriate sites. "It is his clearly stated objective, almost a mantra, to ensure that volunteers have a transforming experience and an enduring and generative impact on the community they serve."

## **UNITED WAY AWARD OF EXCELLENCE IN NONPROFIT STAFF LEADERSHIP**

### **FINALIST**

#### **Debbie Taylor, JAUNT**

JAUNT provides transportation to people with disabilities and to seniors in Charlottesville, Albemarle, Buckingham, Fluvanna, Louisa and Nelson Counties. Debbie Taylor has been with JAUNT for 34 of its 35 years. As Operations Manager, she oversees a fleet of 65 vehicles and a staff of more than 100. Last year JAUNT set a record of more than 300,000 trips. "You can't think of JAUNT without Debbie coming to mind."

"Debbie doesn't see transportation routes, she sees possibilities." Not only does Debbie embrace the organization's mission, she embodies it, and sets the tone of compassionate customer service for the drivers, reservationists, and dispatchers. The winter of 2010 and other weather and road construction challenges have provided Debbie with many opportunities to prove her flexibility and her commitment to getting JAUNT customers to their jobs, schools and medical appointments.

Throughout her 34 years with JAUNT, Debbie has embraced change. When she first joined as a driver, reservations were printed on index cards and posted on a wall. Today, she oversees a computerized reservations and dispatch system that she was instrumental in implementing. "Debbie does not pass on a problem, she solves it. She treats every passenger and each employee as a family member."

## **UNITED WAY-THOMAS JEFFERSON AREA**

Cathy Smith Train  
*President*

Caroline Emerson  
*Vice President and Campaign Director*

Jon Nafziger  
*Vice President for Community Initiatives*

Lisa Frazier  
*Director of Finance and Administration*

Kim Connolly  
*Director of Marketing and Communications*

Alaina Schroeder  
*Data Manager*

Martha Trujillo  
*Community Outreach Coordinator*

Helen Frye  
*RxRelief Prescription Assistance Caseworker*

Pamela Frank  
*Earned Income Tax Credit Coalition Coordinator*

Melissa Beth Behl  
*Insurance for Children Project Outreach Worker*

Jessica Snyder  
*Volunteer Center Director*

Leigha Rae  
*Data Assistant*

## STATE FARM PROUDLY SUPPORTS THE UNITED WAY

State Farm® has been a good neighbor to Charlottesville since 1952, making our community safer, stronger and better-educated.

You'll see State Farm's 1,500 Charlottesville associates around town teaching financial-literacy workshops, donating used prom dresses, and mentoring young students. They are a collection of individuals who want to improve the lives of their neighbors and customers, a core company value.

In 2010, State Farm® gave \$105,000 to local nonprofit organizations, such as United Way-Thomas Jefferson Area, Albemarle County Public Schools, Martha Jefferson Hospital, the Boys & Girls Club of Central Virginia, and Piedmont Virginia Community College.

We salute the United Way-Thomas Jefferson Area for recognizing the outstanding work of a local nonprofit board and nonprofit staff leader through its Awards of Excellence each year. We congratulate and send our sincere gratitude to each finalist for your hard work and love of our community.





**United Way  
Laurence E. Richardson  
Day of Caring**

**Celebrates 20 years**

**Wednesday, September 21, 2011**

Volunteer:

- 👉 Submit a project for a nonprofit or school.
- 👉 Form a team with colleagues and friends.
- 👉 Select a project.
- 👉 Spend the day having fun.

Registration begins Monday, June 13, 2011.

Questions? Contact Jessica Snyder  
434.972.1701 or  
[jsnyder@UnitedWayTJA.org](mailto:jsnyder@UnitedWayTJA.org)