

# LOUISVILLE WATER FOUNDATION



**2021 Report to  
the Community**





# A Message from Our Leadership

The cover photo for this report illustrates the global reach of the Louisville Water Foundation. Men, women, and children celebrated the Ugandan Water Project after the successful installation of rainwater collection systems at six schools in the African country. A grant from the Foundation kickstarted the project, and students at three Louisville schools raised additional funds.

In our own community, Foundation grants supported several important projects last year: helping cancer patients struggling to pay their water bills, providing new water lines for community gardens, waterway cleanup programs, and an art and engineering program that lets students build their own model water towers.

In 2021, the Foundation also continued efforts from the previous year to deliver emergency support to customers impacted by the COVID-19 pandemic and its economic effects. In addition, Foundation grants provided clean water and other assistance to areas of Western Kentucky ravaged by tornadoes.

These are just a few examples of the work highlighted in this report. All the Foundation's efforts throughout 2021 focused on emergency assistance, education, water science, stewardship of resources, or healthy hydration.

We would like to express our sincere gratitude to the donors who make the Foundation's work possible. Funding comes from corporate donations as well as many generous employees at Louisville Water Company and Louisville Metropolitan Sewer District.

Marita Willis  
Chair



Spencer Bruce  
President



# Our History

## *A Legacy of Serving the Community*

Louisville Water Company was chartered in 1854. Throughout its history, the company has worked to improve the welfare of the communities it serves.

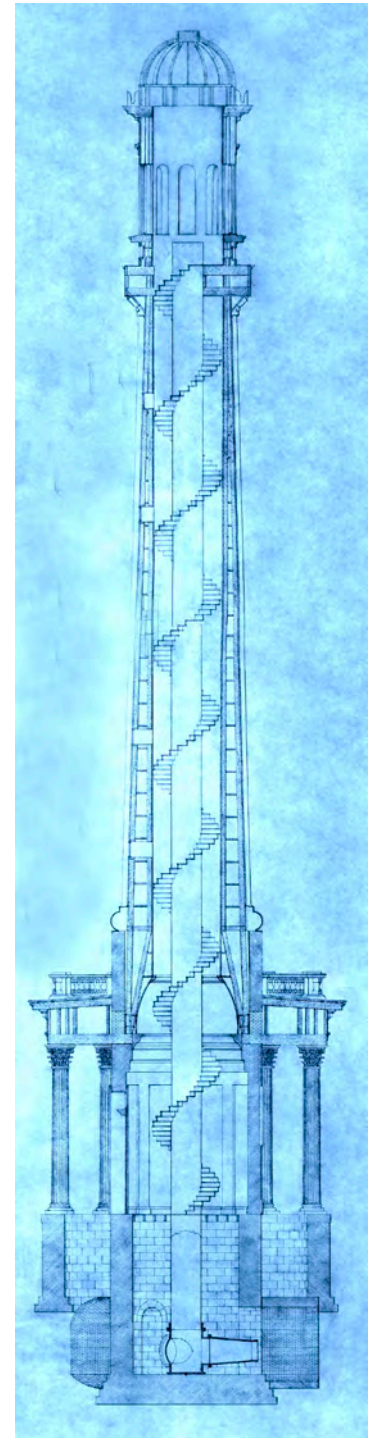
Louisville Water went a step further in 2013 by establishing the Louisville Water Foundation, which consolidated many charitable and philanthropic efforts behind a unified mission. The formation of a separate nonprofit entity allowed the organization to receive financial support from a broad base of public and private sources. This was a critical moment in the company's history as it gave Louisville Water the opportunity to extend its generosity to a global level.

The Foundation operates as an independent entity with a separate Board of Directors who consider grant requests and manage business affairs. The Board includes a diverse representation of employees from Louisville Water, MSD, and members of the public.

*The Louisville Water Foundation was granted status as a tax-exempt public charity under section 501 (c) (3) of the Internal Revenue Code on July 14, 2013. The Foundation's employee identification number is 46-2069742.*

### ***Our Mission:***

*To improve the health and well-being of the communities we serve and around the world by providing water assistance and water education.*





*Thousands of customers kept their faucets flowing because of the Metro COVID-19 Relief Fund, the Drops of Kindness program, and the work of community agencies.*

## Providing Emergency Assistance

The Foundation began 2021 by helping thousands of Louisville Water and MSD customers with financial assistance as they struggled to pay their bills due to the ripple effects of the COVID-19 pandemic.

On January 5, the Foundation's Board members approved final disbursement arrangements for a \$1.75 million donation from Louisville Water Company. These funds augmented \$4 million in the Metro COVID-19 Relief Fund that the Louisville Metro Council previously approved for water and wastewater bill assistance. Louisville Water built a portal for customers to apply online and immediately learn if they were eligible. Funds could be credited to customer accounts in less than 24 hours.

Jefferson County residential customers were eligible for assistance if they had a past-due balance incurred between March 16 and December 31, 2020 and if they attested they were negatively impacted by the pandemic. By mid-February 2021, nearly 12,000 customers received Metro COVID-19 Relief credits between \$10 and \$500, based on their needs. Nearly a fourth of these customers lowered their balance to zero. Another 4,200 customers established payment plans with an average payment of \$50 a month.

Customers praised the program as "a blessing to many out-of-work people" and "a relief to have help with our water bill." One customer said, "I am in tears. My family is extremely grateful for this!"

The Foundation also provided customer assistance through community organizations that it has supported for many years. In 2021, the Foundation provided \$600,000 to the Association of Community Ministries in Jefferson County and \$40,000 to the Multi-Purpose Community Action Agency in Bullitt County.

These organizations, along with the Tri-County Community Action Agency in Oldham County, distributed funds through Drops of Kindness<sup>SM</sup>, a program that combined previous efforts under one umbrella to offer customers a range of financial assistance options for their water and wastewater bills.

The Foundation also has supported the Salvation Army's Water Bill Payment Assistance Program for many years and provided \$42,500 to continue the Salvation Army's work in 2021.



## Tornado Relief

Late in the evening on December 10, 2021, an outbreak of tornadoes spanned more than 165 miles across western Kentucky, carving a path of catastrophic damage. An EF4 tornado topped wind speeds of 160 mph, devastating many communities, including parts of Mayfield, Princeton, and Dawson Springs.

To help residents in these areas, the Foundation donated \$10,000 to the Team Western Kentucky Tornado Relief Fund, which provided a range of relief efforts, including making sure residents had access to safe drinking water. Governor Andy Beshear established this fund to support more than a dozen counties affected by the storms.

The Foundation also donated \$5,000 to Louisville-based WaterStep. On December 13, WaterStep partnered with the Inspiritus organization to send a WOW (Water on Wheels) Cart, a mobile water treatment system, to Mayfield to provide chlorinated water for showers, cleaning, and community distribution.

A few days later, WaterStep set up a second WOW Cart at His House Ministries Church to supply safe water to MercyChefs for food preparation, cooking, and cleaning. MercyChefs provided thousands of meals for emergency workers and residents. A WaterStep team traveled to Dawson Springs to deliver mobile disaster kits, which are smaller versions of the WOW Cart. They're equipped with an M-100 chlorinator, 500-gallon bladder tank, and BleachMaker for cleaning surfaces and general disinfection.



*A long-track tornado on December 10, 2021, caused devastation in several Kentucky communities.*





*The Ugandan Water Project raised funds for rainwater collection systems.*



*The Young Authors Greenhouse published an anthology of student stories and poems about water.*

## 2021 Grant Highlights

### Ugandan Water Project

A \$10,800 grant from the Louisville Water Foundation kickstarted a project involving students at three Jefferson County middle schools who brought safe, clean drinking water to their peers in Uganda.

Students at Olmsted Academy South, Westport Middle School, and W.E.B. DuBois Academy partnered with the Ugandan Water Project. Together, they raised an additional \$9,709 for six rainwater collection systems at schools in the African country. The Louisville students researched safe drinking water and pledged to help solve the global issue.

“The Ugandan Water Project gave our students the opportunity to not just learn about the worldwide water shortage but also to make an impact,” said Westport science teacher Natalie Butcher. “It was a priceless, life-changing experience for our kids, as well as for the kids in Uganda.”

### Young Authors Greenhouse

In 2019, the Foundation awarded \$20,000 to the Young Authors Greenhouse, a Louisville-based nonprofit organization, to fund a Poetry of Water program. In 2021, the Foundation Awarded an additional \$15,000 to continue the organization’s Water Series program for nearly 90 Jefferson County students for the 2021-22 school year.

Amandarae Matthew, a teacher at Olmsted Academy South, said partnering with the Young Authors Greenhouse allowed her “to read some of the most beautiful, heartbreaking, and awe-inspiring writing from students who aren’t even 13 yet.”

The students learned about the history of the Ohio River while also reflecting on their own water experiences. The culmination of the program was a hardcover book, *Water Moves With Me*, an anthology of poems and stories written by students at Olmsted Academy South and Western Middle School. The book includes poems from the perspective of underwater creatures and even imagined histories of objects thrown into the water.

### Shirley’s Way

A Louisville-based nonprofit organization, Shirley’s Way provides financial support to people under medical care for cancer and other diseases. The support may include payment for not only medicine and medical bills but also rent, mortgage, groceries, and utilities.

The Foundation awarded \$10,000 to Shirley's Way to help the organization support individuals and families with their Louisville Water bills before they become delinquent on their payments. Many of the families that Shirley's Way helps fall outside the income requirement guidelines for other customer-assistance programs that do not consider the significant additional expenses often associated with medical care.

## **Louisville Grows**

The Foundation granted Louisville Grows \$25,000 in 2020 to complete the purchase of a truck to water trees planted in several South Louisville neighborhoods. Pleased with the success of the program, the Foundation awarded \$15,000 in 2021 to support Louisville Grows' additional urban sustainability efforts. These include helping resident groups and other nonprofit organizations start and maintain community gardens. Louisville Grows provides supplies and equipment.

Executive Director Ked Stanfield offered a few examples of the ways the Foundation grant helped Louisville Grows: "We worked with Blackacre Community Garden to extend their water line to provide more access to water for their ever-expanding garden. Currently, there are over 235 beds, and this expansion helped about 35 new plots have access to water."

"We also worked with the Hope Farm and Community Garden to extend the water line to new plots and to provide additional water hoses to gardeners to reach their plots. This site has approximately 82 refugee-run garden plots as well as a two-acre CSA [Community Supported Agriculture] garden providing vegetables to families across Jefferson County. The water line extension reaches approximately 40 new plots."

## **Fund for the Arts**

Combining art, history, architecture, and engineering, the Fund for the Arts' Form and Function program helps local students understand how water towers work. The students learn about the historic Louisville Water Tower before creating their own model towers.

The Foundation has funded this program since 2017 and appreciates the partnership between the Fund for the Arts, Louisville Visual Arts, and Louisville Water's education initiatives. The Foundation awarded \$20,000 in 2021 to offer more than 600 additional students a five-session residency program focused on water education and core content through the hands-on art project.



*Louisville Grows helps other organizations start and maintain community gardens.*



*Students create their own water towers in the Fund for the Arts' Form and Function program.*





*The Kentucky Waterways Alliance supports waterway cleanup projects.*

“This program was an incredible opportunity for my students to learn about a very important and historic landmark in Louisville,” said Bates Elementary teacher Rachel Rich. “Furthermore, it allowed my students time to utilize creative and critical thinking skills while constructing their very own water tower.”

“We absolutely loved designing the blueprint, making our water tower, and then comparing the two,” said Chenoweth Elementary teacher Katherine Grisanti. “The students loved bringing their drawings to life.”

## **Kentucky Waterways Alliance**

The Alliance is a Louisville-based organization that focuses on protecting, restoring, and celebrating waterways throughout the Commonwealth. Since the start of the pandemic, the Alliance has seen a significant increase in the number of organizations requesting information or assistance with waterway cleanup projects. The Foundation granted a request for \$10,000 to help the Alliance launch a community engagement program that is increasing its capacity to help with these projects.

“Kentucky Waterways Alliance was able to support existing staff and hire new staff in the areas of community engagement and waterways cleanups over the past year partly because of the funding provided by this grant,” said Executive Director Ward G. Wilson.

In addition, the grant supported several events, including a Wild & Scenic Film Festival, an Ohio River paddle and Earth Day celebration, and Saving Our Rivers events with the Louisville Rotary Club.



*Teach Kentucky recruits educators for public schools, including teachers who provide lessons on water science.*

## **Teach Kentucky**

A nationwide teacher shortage has been a problem for many years and is expected to become even worse. In Kentucky, nearly three-quarters of teachers are at risk of leaving the profession, either because they are close to retirement or because they are in groups that are more likely to quit: early-career teachers and those who have returned to the classroom after a break.

Teach Kentucky is an organization that recruits teachers to the Commonwealth's public schools for a range of subjects, including science and math. The Foundation has supported the organization since 2017 when a grant helped it expand recruitment nationally and launch a Louisville Water Foundation Fellowship Program, which promotes collaboration between science educators and water industry professionals. In 2021, the Foundation awarded an additional \$15,000 to help Teach Kentucky continue its critical work.



# 2021 Financial Highlights

As an independent nonprofit entity, Louisville Water Foundation can receive financial support from a broad base of public and private sources.

The Foundation is committed to maintaining the highest levels of financial transparency. Accordingly, the financial information contained in this annual report is available for further inspection upon request.

The Foundation is governed by a 14-member Board of Directors that is responsible for management and administration, including the review and approval of operating policies, charitable grants, and financial statements. (See page 10 for a list of Board members.)

Policies for the Foundation consist of the following:

- Bylaws and Articles of Incorporation — lists the responsibilities of directors and officers and the requirement to produce an annual report
- Conflict of Interest Policy — requires the disclosure of all possible conflicts of interest for both directors and officers
- Procedure for Disbursements — establishes a set of internal controls
- Whistleblower Procedure — establishes a procedure to follow for complaints
- Affordability Program Policy — establishes the framework for water affordability programs
- Investment Policy — lists approved securities with an emphasis on capital preservation
- Shared Services Agreements — provides for services from as well as reimbursement to Louisville Water Company
- Grant Review Committee — establishes a committee to review and recommend grants to the full Board for approval

The Foundation's Grant Program is designed to provide support for projects or activities that address community water needs. All submitted grant applications are reviewed and scored by the Grant Review Committee.

The committee evaluates each grant application in terms of demonstrated financial need, fiscal viability, adherence to the values of the Foundation, alignment with its mission, and the degree to which it meets the intent of its grant program.

If the grant application meets the Foundation's eligibility requirements and minimum scoring criteria, it is presented to the full Board, which ultimately makes the final decision.

The Foundation's 2021 financial statements show total revenue and support of \$4,579,865, total expenses (including grants) of \$5,440,097, and a balance of \$1,353,524 at the end of the year.



## Condensed Statement of Financial Position

	Dec. 31, 2021	2020 Actual	Variance	% Change
Cash and Cash Equivalents	\$1,245,480	\$2,106,129	\$(860,649)	-40.9%
Accounts Receivable	403	446	(43)	-9.6%
Investments	109,358	109,333	25	0.0%
<b>Total Assets</b>	<b>\$1,355,241</b>	<b>\$2,215,908</b>	<b>\$(860,667)</b>	<b>-38.8%</b>
Accounts Payable and Accrued Expenses	\$1,717	\$2,152	\$(435)	-20.2%
<b>Total Liabilities</b>	<b>\$1,717</b>	<b>\$2,152</b>	<b>\$(435)</b>	<b>-20.2%</b>
Unrestricted Net Assets	\$418,343	\$463,756	\$(45,413)	-9.8%
Temporarily Restricted Net Assets	935,181	1,750,000	(814,819)	-46.6%
<b>Total Net Assets</b>	<b>\$1,353,524</b>	<b>\$2,213,756</b>	<b>\$(860,232)</b>	<b>-38.9%</b>
<b>Total Liabilities &amp; Net Assets</b>	<b>\$1,355,241</b>	<b>\$2,215,908</b>	<b>\$(860,667)</b>	<b>-38.8%</b>

## Condensed Statement of Activities

	Year Ended Dec. 31, 2021	2020 Actual	Variance	% Change
Louisville Water Contributions	\$250,000	\$2,100,000	\$(1,850,000)	-88.1%
Louisville Water Combined Giving Campaign & Payroll Contributions	31,075	28,984	2,091	7.2%
MSD Water/Sewer Assistance Contributions*	250,000	250,000	-	0.0%
MSD Employee Donations & Payroll Contributions	10,133	11,999	(1,866)	-15.6%
HomeServe USA Contribution	12,000	12,000	-	0.0%
COVID Relief Fund	4,000,000	-	4,000,000	na
Other Income	26,657	3,622	23,035	636.0%
<b>Total Revenue and Support</b>	<b>\$4,579,865</b>	<b>\$2,406,605</b>	<b>\$2,173,260</b>	<b>90.3%</b>
Local Water Assistance (Customer Assistance Program)	\$482,500	\$217,500	\$265,000	121.8%
COVID Relief Fund	4,814,819	-	4,814,819	na
Water Education	75,000	52,950	22,050	41.6%
Other Contributions	43,300	88,000	(44,700)	-50.8%
Other Expense	24,478	14,887	9,591	64.4%
<b>Total Expenses</b>	<b>\$5,440,097</b>	<b>\$373,337</b>	<b>\$5,066,760</b>	<b>1357.2%</b>
Change in Net Assets	\$(860,232)	\$2,033,268	\$(2,893,500)	-142.3%
<b>Net Assets, Beginning of Year</b>	<b>2,213,756</b>	<b>180,488</b>	<b>2,033,268</b>	<b>1126.5%</b>
<b>Net Assets, End of Year</b>	<b>\$1,353,524</b>	<b>\$2,213,756</b>	<b>\$(860,232)</b>	<b>-38.9%</b>

\*Funds are designated for the Jefferson County Customer Assistance Program administered by the Association of Community Ministries.





## **Board of Directors**

*Marita Willis – Chair*

*Spencer Bruce – President*

*Lynn Pearson – Treasurer*

*Michael Tigue – Secretary*

*Chad Collier*

*Emily Fritz*

*David Glenn*

*Jim Grunow*

*Greg Heitzman*

*Keith Meriwether*

*Tony Parrott*

*Kimberly Reed*

*Terrence Spence*

*Jennifer Fust-Rutherford*

# How to Apply for a Grant

The Louisville Water Foundation accepts grant applications year-round from organizations with projects that address a water-related need.

Examples of projects/activities supported:

- Potable water solutions in water-poor communities
- Water assistance programs serving individuals and/or communities
- Water awareness or education campaigns
- Water stewardship education
- Surface or groundwater protection education
- Watershed cleanup

The Louisville Water Foundation awards grants to 501c3 organizations based in the United States. Nonprofits located elsewhere need a US-based fiscal sponsor or partner agency to apply on their behalf.

Activities that do not qualify:

- Interest payments
- Personal articles
- Lobbying (attempting to influence local, state, or national legislation)

Selection Criteria:

- Clarity of project goals, objectives, and potential impact on the community
- Strength of project design and team
- Evidence of an innovative approach with real-world application
- Sustainability of the project post-grant
- Evidence of community engagement
- A plan for assessing the impact of project and the capacity to measure its outcomes
- A reasonable and efficient budget

For more information, visit [LouisvilleWaterFoundation.org](http://LouisvilleWaterFoundation.org).

To support the goals of the Foundation, contribute to the Drops of Kindness program when you pay your water bill. You also can make a donation at [LouisvilleWaterFoundation.org](http://LouisvilleWaterFoundation.org).

# LOUISVILLE **WATER** FOUNDATION



**550 South Third Street, Louisville, KY 40202**

**[LouisvilleWaterFoundation.org](http://LouisvilleWaterFoundation.org)**