WITH YOU



EDUCATION. INCOME. HEALTH. TRANSPORTATION

2016-17
Report to the Community

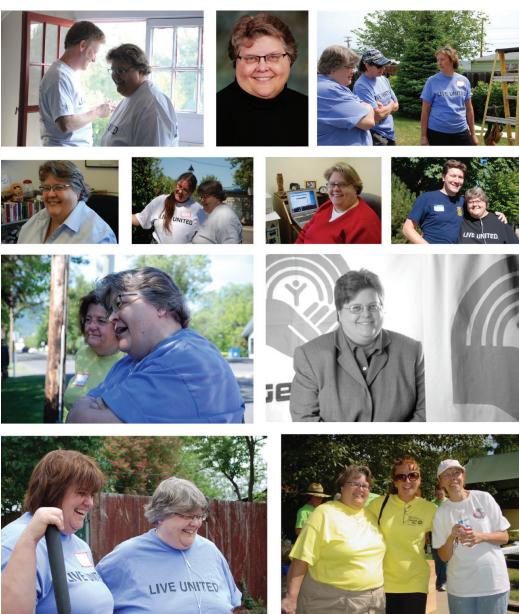


20 years... "Not everything that can be counted counts, and not everything that counts can be counted."

Wow my 20th year is completed. I wanted to count how many people volunteered in 20 years, how many dollars were raised in 20 years, how many lives were impacted in 20 years, and then I remembered what Einstein said or at least what is frequently attributed to him. "Not everything that can be counted counts, and not everything that counts can be counted." Now they say that William Bruce Cameron said it. If we wait long enough, always someone else said it and always someone else counted it.

What matters is that last year, people gave wit, wisdom and wealth to make this community the amazing community that it is. And that we did it together. We are deeply interconnected. We do this work with you. I spoke to the business school graduates from SOU and my final comment was rather than care about what you do, do what you care about. I believe this and I believe that when you work with us, you are doing just that and that is what counts! Thank you!





MISSION

To improve lives by mobilizing the caring power of Jackson County communities.

VISION

We will build a stronger Jackson County by mobilizing our communities to improve people's lives.

OUR BELIEF

At its core, United Way of Jackson County believes people are connected and interdependent. When we reach out a hand to one, we influence the condition of all. We all win when children form healthy attachments through a loving family, when they succeed in school, graduate and make successful transitions to adult responsibilities. We all win when families are financially stable, when people have good health, and when people are engaged and connected. We all win when people have transportation to pursue education, access medical services and work. Through our role as convener, facilitator and advocate, our goal is to create long-lasting change by addressing the underlying causes of problems. This belief forms the foundation for our strategies for education, income, health and transportation.

ACCOUNTABILITY

- Finance committee manages financial and investment policy, hires the independent auditor, serves as uncompensated volunteers, and has three CPA members.
- Board requires staff to be responsible for accuracy, fairness and completeness of financial statements and IRS 990.
- Have established procedures for anonymous report of any financial concerns and ensure that any report is fully investigated.
- Contracts with audit firm for audit and 990 preparation.
- Conflict of interest policy and code of ethics for staff and volunteers.
- Accounting and records retention policies regularly reviewed.
- 360 degree evaluation of CEO/executive director.

2016-17 Board of Directors

Jennifer Susi, President Asante Health System

Rebecca Vega, First Vice President St. Mary's School

Chris Hilkey, Second Vice President Community Volunteer

Jason Lukaszewicz, Treasurer Moss Adams LLP

Kristin Milligan, Secretary Pacific Retirement Services

Karen Bartalini Providence Medford Medical Center

Amy Belkin Teresa McCormick Center

Charley Bolen Hornecker, Cowling LLP

Chris DuBose US Bank

Steve Erb People's Bank of Commerce

Helen Funk Jackson County

Penny Garrett Regence BlueCross BlueSheild

David L. Gremmels Rogue Creamery

Tamera Heaton Community Volunteer

Cary Jones Community Volunteer

Michele Jones Community Volunteer

Kim Katic Wells Fargo Bank

Eean Levin Wells Fargo Bank

Beth Lindsay Community Volunteer

Frank Lucas Community Volunteer

Nick Parsons Rogue Credit Union

Francis Plowman Rogue Creamery

Lance Reyes Propel Insurance

Dana Shumate WorkSource Oregon

Valerie Stein-Retiz Ashland Tennis & Fitness Club

Dan Thorndike Medford Fabrication

Deelia Warner US Bank

Bob Wise KOBI-TV NBC5/KOTI-TV NBC 2

Staff

Dee Anne Everson CEO/Executive Director

Jan Sanderson Taylor Community Impact Director - Income and Transportation

Anna Barnsley Werblow Chief Operating Officer

Debi Jensen Office Manager

Talia Matthias Community Impact Director - Education and Health

Troy Ferguson Campaign and Social Media Director

UNITED WAY OF JACKSON COUNTY

Statement of Financial Position June 30, 2017 (With Comparative Totals for 2016)

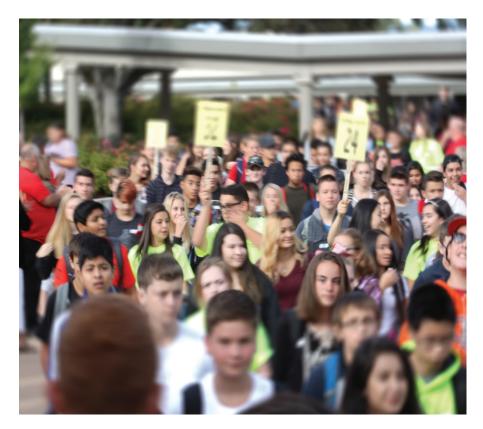
	204.7			2046	
Assets		2017		2016	
Current Assets:					
Cash and cash equivalents	\$	114,624	\$	7,776	
Funds held for others		94,017		43,714	
Current portion of pledges and grants receivable, net		209,124		220,458	
Prepaid expenses		986		828	
Total Current Assets		418,751		272,776	
Property and equipment, net		1,282		2,755	
Noncurrent portion of pledges and grants receivable, net				3,021	
Investments		177,231			
Assets restricted by donors for long-term purposes		173,166			
Beneficial interest in assets held by others		224,296		664,722	
Total Assets	\$	994,726	\$	943,274	
Liabilities and Net Assets					
Current Liabilities:					
Accounts payable and accrued liabilities	\$	6,547	\$	23,723	
Funds held for others		94,017		43,714	
Undesignated allocations payable		22,332		25,394	
Designations payable		65,926		52,920	
Note payable - line of credit				20,000	
Total Liabilities		188,822		165,751	
Net Assets:					
Unrestricted		334,789		341,485	
Temporarily restricted		133,703		99,454	
Permanently restricted		337,412		336,584	
Total Net Assets		805,904		777,523	
Total Liabilities and Net Assets	\$	994,726	\$	943,274	

Administration

United Way of Jackson County has a full time staff of six people and a board of 28 community volunteers. We have more than 1,700 volunteers serving on committees, councils, task forces and one-time projects. As one of the largest volunteer agencies in the county, we are proud to promote giving, advocating and volunteering. Our administrative expense totals 11% of our budget.

EDUCATION

The Big Idea is now in its 6th year. With 1,395 9th graders in the class of 2020, things are always in motion! We have provided direct services for more than 795 Big Idea kids and their families. In addition, we welcomed them to high school with a high five tunnel at North and South Medford.



In Eagle Point, we were able to leverage resources to hire a Graduation Coach to get Freshmen back on track. Eagle Point freshmen also received the first of its kind curriculum to teach students about ACE's (Adverse Childhood Experiences) with the help of Laura Porter, ACE Interface, and Cultural Agility/Implicit Bias with Gilda Montenegro Fix. The Illinois Valley High School freshman toured the RCC Table Rock campus.

We funded 19 different programs through allocations, Day of Caring and WiLL. And we had 6 impact partnerships. United Way's total investment in the Education Impact Area is 25% of our annual budget and our goal is 100% high school completion for the Class of 2020.

HEALTH

United Way of Jackson County proudly became the fiscal agent of Oregon Pain Guidance Group. This group of dedicated doctors, health professionals and community volunteers bring together medical practitioners, pharmacists and others to reduce opioid addiction.

Last summer, we launched an anti-stigma campaign about mental illness. Our goal was to have 395,000 impressions in our community. We broke all statewide records for public awareness and received 1 million impressions! The campaign was so successful it was used in the NAMI walk this fall.

We funded 26 programs through allocations, Day of Caring, and WiLL. And we have 6 impact partnerships. The health area accounts for 19% of United Way's budget and our goal is maximizing wellness.



INCOME

VITA (Volunteer Income Tax Assistance) is our free income tax preparation work. Our partnership happens at the Teresa McCormick Center on the Harry & David Campus. We filed 204 state and Federal returns with refunds totaling \$279,869. We did this with 10 volunteers – 6 preparers, 3 greeters, 1 scheduler! This was all done in a site open 22 days.

HOPE Chest, our emergency fund, helped 234 families with an average investment of \$239. HOPE Chest continues to serve individuals and families with everything from car repairs to vet care for service animals. The toughest checks seem to be those dealing with funeral expenses for loved ones and Veterans. We partner with case managers and pay the vendors directly and solve the immediate need.



Project Community
Connect is our
community's one
day outreach to
those experiencing
homelessness or near
homelessness. Last year,
volunteer judges waived
thousands of dollars
in fines, veterinarians
saw 65 pets and birth
certificates were ordered
all day long. This project
is successful because of
all the partners involved.

FamilyWize Prescription Assistance, a national program, was brought to Jackson County by United Way in 2009. Since that time, we have saved local folks \$1.5 million in prescription costs!

We funded 19 programs through allocations, Day of Caring, and WiLL. We have 6 impact partnerships and these programs makes up 17% of United Way's budget and our goal is family stability.

TRANSPORTATION

United Way continues its partnership and efforts to reduce barriers for low income, aging and people with disabilities to get to work, to school and to needed appointments. United Way's total investment in the Transportation Impact Area is 18% of our budget.

DAY OF CARING

Thanks to our sponsors for Day of Caring: Medford Fabrication, Avista Utilities, US Bank, Pacific Retirement Services, Moss Adams LLP, Wells Fargo, Regence BlueCross BlueShield, Rogue Creamery, Sherwin Williams, Jackson Care Connect, Bennion Orthodontics, and Rogue Credit Union! What a great day with more than 450 volunteers!



We completed some great projects at our 21st Annual Day of Caring including:

ASH, Inc., Ashland – fence staining
Children's Advocacy Center, Medford – painting
Family Nurturing Center, Medford – landscaping
Girl Scouts, Medford – landscaping
Hope Village, Medford – build
Laundry Love, Ashland UCC – laundry
Magdalene Home, Medford – landscaping, outdoor toy clean up
Rogue Community Health, Medford – landscaping
Roots & Wings, Medford – landscaping
Sanctuary One, Applegate – goat playground, rabbit arena
Science Works, Ashland – painting
Sobering Center, Grants Pass – painting
Unete, Medford – farmworker welcome bags



















United Way of Jackson County

1457 East McAndrews Medford, OR 97504-6107 541-773-5339 UnitedWayofJacksonCounty.org



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