

CHANGE HAPPENED
WITH YOU



EDUCATION. INCOME. HEALTH. TRANSPORTATION

2016-17

Report to the Community

United Way of Jackson County



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!

DeAnne



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 BlueShield
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)

	2017	2016
Assets		
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.

FamilyWise 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
Upper Rogue Community Center, Shady Cove – landscaping





LIVE UNITED



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UnitedWayofJacksonCounty.org



United Way of Jackson County 

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