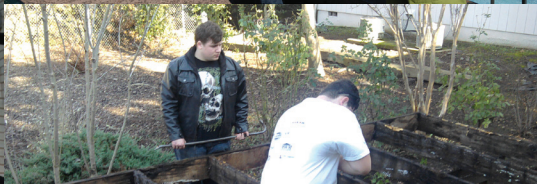
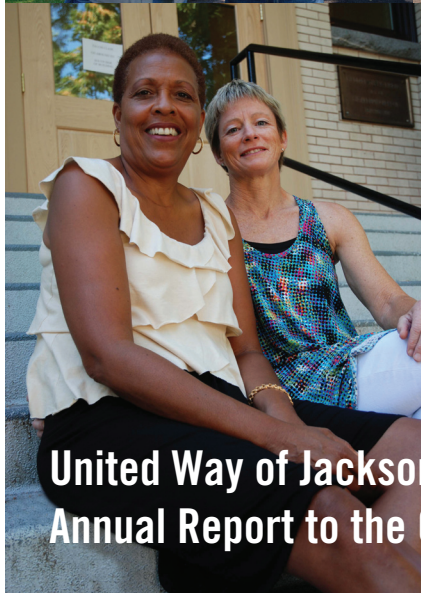




UNCOMMON PEOPLE  
**UNITED**  
FOR THE COMMON GOOD



**United Way of Jackson County  
Annual Report to the Community**

**Fiscal Year  
January 1, 2011  
June 30, 2011**



The United Way Board is involved, creating impact in all arenas.



Signing of anti-sex-trafficking legislation in Salem.



VITA site volunteer and tax preparation clients at the Teresa McCormick Center on the Harry & David campus.



## **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 two 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 and code of ethics for staff and volunteers.
- Accounting and records retention policies regularly reviewed.
- 360 degree evaluation of executive director.



# BOARD OF DIRECTORS

## 2011 Leadership

### Campaign

Marsha Billeci, PremierWest Bank

### Community Building

Dennis Morgan, Morgan Wealth Management

### Day of Caring

Bob Hunter, Mail Tribune

Nick Parsons, Rogue Federal Credit Union

### Finance

Jason Lukaszewicz, Moss Adams LLP

### Nominating

Cary Jones, KMVU-TV Fox 26

### Past Presidents

Deelia Warner, US Bank

### Personnel

Dan Thorndike, Medford Fabrication

### Raising Awareness

Jonathan Eldridge, Southern Oregon University

### Will Council

Sen Susi, Asante Health Systems

### President

Deelia Warner, US Bank

### 1st Vice President

Cary Jones, KMVU-TV Fox 26

### 2nd Vice President

Kent Brown, Rogue Valley Medical Center

### Secretary

Anne Ashbey Pierotti, Blackstone Audio

### Treasurer

Jason Lukaszewicz, Moss Adams LLP

Amy Belkin, InCommunication

Diane Bennett, KeyBank

Marsha Billeci, PremierWest Bank

Barb Brazier, Community Volunteer

Julie Brown, RVTd

Eric Carlson, JPMorgan Chase

Tim Clayton, US Bank

Jonathan Eldridge, Southern Oregon University

David Gremmels, Rogue Creamery

Bob Hunter, Mail Tribune

Michele Jones, Community Volunteer

Danny Jordan, Jackson County

Kim Katic, Wells Fargo Bank

Raf Mesta, OR DHS

Dennis Morgan, Morgan Wealth Management

Doug Nash, Harry & David

Stewart Parmele, Michael L Piels CPAs, LLP

Nick Parsons, Rogue Federal Credit Union

Rick Rankin, Providence Medical Group

Lance Reyes, Regence BlueCross BlueShield

Sue Slack, Community Volunteer

Dan Thorndike, Medford Fabrication

Nancy Wilson, Regence BlueCross BlueShield

Bob Wise, KOB-TV NBC 5/KOTI-TV NBC 2

Peggy Wisneski, Community Volunteer

Suzanne Zapf, Community Volunteer





# DAY OF CARING

## Day of Caring Projects

- Addictions Recovery Center, Genessee, Medford, Rogue Federal Credit Union, landscaping and painting.
- Addictions Recovery Center, West Main, Medford, Medford Active 20-30 Club and North Medford High School students, spreading gravel, landscaping and building picnic tables.
- ASH, Almeda Drive, Ashland, Ashland Fire Department Union and Blackstone AudioBooks, building fence extensions, landscaping and pavers.
- Dunn House, Regence BlueCross BlueShield, John L. Scott Earth Angels and women from United Way's WiLL Council, staining the fence, painting and landscaping.
- Living Opportunities, Auburn House, US Bank, building shed and landscaping.
- Living Opportunities, Golf View House, Medford, Wells Fargo, building a fence.
- OnTrack, Home Program, Medford, St. Mary's students and United Way board members, landscaping and painting
- Phoenix Counseling Center, Phoenix, Target, landscaping and painting.
- Roots & Wings, Medford, Rogue Creamery and Ellisons, painting and landscaping.
- American Red Cross, Medford, PremierWest Bank, landscaping and cleaning windows.



## Sponsors

Avista Utilities  
Medford Fabrication  
Wells Fargo  
Rogue Creamery  
Regence BlueCross BlueShield  
US Bank  
Morgan Wealth Management Lowes  
Lowe's



# Impact

## EDUCATION

**Helping children and youth achieve their potential**

United Way is involved with the Early Childhood Partnership Team and the Mentoring Coalition working to find the best way for involvement in strengthening families.

### FUNDED PARTNERS

47 programs through 36 partner agencies focus on the building blocks of a good life.

All donations to United Way share a proportionate percentage of the actual costs of fundraising and administration and a three-year average pledge loss percentage.

No dues or fees are charged to agencies belonging to the United Way of Jackson County Federation of the Combined Federal Campaign

## INCOME

**Individual and family financial stability**

CASH Jackson County is our partnership to help working poor taxpayers complete their tax returns and receive the credits they earned at our VITA site. Our work garnered a Crystal Groundbreaking Award from the IRS.



**The Crystal Groundbreaking Award**

HOPE Chest continues to bridge critical gaps so people can move forward. United Way also is active in the Homeless Task Force and the Project Homeless Connect event with many community partners.

## WiLL (Women Living Leadership)

**The mission of WiLL is to improve women and children's lives by mobilizing the caring power of women.**

Eleven programs directly benefiting women and children in transition received funding raised by women at the WiLL annual luncheon. WiLL laid the groundwork for Community Building Council support and Board endorsement of anti-sex-trafficking legislation. During this year the WiLL council also carefully considered creating a car donation program to help provide transportation for women in transition. That effort is moving forward.

## HEALTH

### Improving people's health

Our Community Building Council had the courage to recommend endorsement of anti-sex trafficking legislation to the United Way Board and the Board had the courage to endorse it. In July United Way of Jackson County stood with OASSIS and the Oregon Center for Christian Values as the Governor signed that legislation into law.

The Mail Tribune, one of our CAN partners, won the Public Service Award from the Oregon Press Association for Don't Turn Away.

The first CAN training and summit resulted in the creation of a new risk management team.

People came to Vogel Plaza in an annual event led by CAN in April to hear the stories of abused and neglected children read by brave community members. Another step out of darkness and away from invisibility for the children who have lived stories like these.

## TRANSPORTATION

### Removing barriers

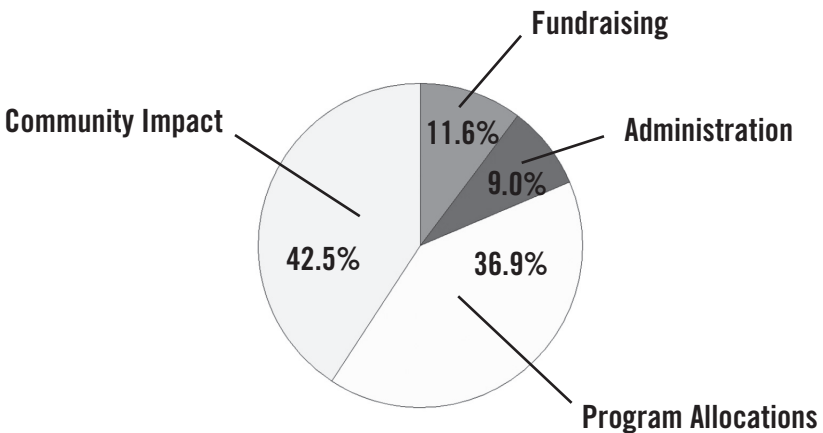
This was our year to learn about the issues of transportation in our county. The Community Building Council learned so much this year — enough to build a foundation for a future to including a variety of transportation modalities.





## Fiscal Year Change

The United Way of Jackson County Board of Directors approved a change in our fiscal year in April 2011. The change was effective July 1, 2011. The short fiscal year ended June 30, 2011. This fiscal year better reflects our business cycle, and will allow for cleaner reporting of campaign results, allocations and designations. The short year financial statements will be audited in fall 2012, along with fiscal year July 1, 2011 to June 30, 2012. The short fiscal year also affected board terms and officer terms with the short year being treated as a complete year.



**United Way of Jackson County  
Statements of Financial Position**

	<b>Audited 12/31/2009</b>	<b>Audited 12/31/2010</b>
<b>Assets</b>		
Current Assets		
Cash and Cash Equivalents	166,869	114,474
Current Portion of Pledges Receivable, Net	478,081	416,975
Prepaid Expenses	4,808	4,979
Other Receivables	<u>270</u>	<u>25,600</u>
Total Current Assets	<u>650,028</u>	<u>562,028</u>
Property and Equipment, Net	<u>16,410</u>	<u>14,133</u>
Other Assets		
Noncurrent Portion of Pledges Receivable, Net	84,900	79,399
Beneficial Interest in Funds Held by OCF	<u>431,708</u>	<u>458,470</u>
Total Other Assets	<u>516,608</u>	<u>537,869</u>
Total Assets	<u>1,183,046</u>	<u>1,114,030</u>
<b>Liabilities and Net Assets</b>		
Current Liabilities		
Accounts Payable and Accrued Liabilities	19,501	2,906
Undesignated Allocations Payable	193,924	152,133
Designations Payable	156,024	129,781
Note Payable — Line of Credit	<u>0</u>	<u>52,000</u>
Total Liabilities	<u>369,449</u>	<u>336,820</u>
Net Assets		
Unrestricted	189,350	261,820
Temporarily Restricted	511,131	402,274
Permanently Restricted	<u>113,116</u>	<u>113,116</u>
Total Net Assets	<u>813,597</u>	<u>777,210</u>
Total Liabilities and Net Assets	<u>1,183,046</u>	<u>1,114,030</u>

This financial report is designed to present the user (donors, community members and creditors) with a general overview of the United Way's finances and to demonstrate the United Way's accountability. Questions concerning any of the information provided in this report or requests for additional information should be addressed to the United Way of Jackson County, 769 Spring Street, Medford, OR 97504.



Day of Action project, a book drive for children's books to honor the life of Kacy Sue Lunsford.



Campaign Cabinet retreat in preparation for the fall campaign.



Marsha Billeci at the cabinet retreat preparing to chair the fall campaign.



Day of Caring at Addictions Recovery Center, West Main, Medford.



The boardroom — at the Mail Tribune conference room.



United Way Staff: Office Manager Debi Jensen; Finance Director Anna Barnsley Werblow, CPA; Community Engagement Director Jan Sanderson Taylor; Executive Director Dee Anne Everson; and Deputy Director/Resource Development Diane Mathews.



United Way  
of Jackson County



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**UnitedWayofJacksonCounty.org**



United Way of Jackson County Medford Group



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