What an incredible ride! The year ended with our increased understanding and deeper commitment to transportation as a social issue. We launched our Mobility Management project in partnership with RVTD with the beginning of United We Ride and the Bike Team. We're exploring ways to help people access education, jobs, and health care in easier ways. We continued our great efforts with BIG IDEA kiddos! They ended 6th grade with a T-shirt from a college or university across the country and some from around the world thanks to our social media followers! Speaking of which, like us on Facebook, United Way of Jackson County and The Big Idea Community page. Follow us on twitter at UWJACKSON. Our VITA (Volunteer Income Tax Assistance) site in partnership with Teresa McCormick Center and AARP Foundation Tax Aide sites continue their efforts to bring back more than $3.2 million to Rogue Valley residents in earned tax credits. HOPE Chest, Project Community Connect, WiLL and Day of Caring along with our 57 funded partners continue to help our community be the place we all want to live, work and play. There’s always room for you to give, advocate and volunteer – to LIVE UNITED.
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.
Day of Caring Sites, Teams

- Rogue Valley YMCA – People’s Bank of Commerce, Providence Health System, and Rogue Creamery – spring cleaning
- Compass House – The Mankind Project – painting
- ACCESS – Rogue Credit Union – painting
- Southern Oregon Head Start – Harry & David, Mike Gard, Marsha Billeci – painting
- Roots & Wings – Regence BlueCross BlueShield, US Bank, AmericanWest Bank – landscaping, playscaping, gardening, painting

Value of projects estimated at $28,000
DARE TO BE BIG! Over 1,000 6th graders are part of THE BIG IDEA partnership between United Way, Medford 549C School District, Cave Junction and our communities to create 100 percent high school completion for the Class of 2020. In September 2013, Talia Matthias was hired as Education Impact Director. Numerous activities have occurred as a result; mentoring and tutoring have begun, kids have received eye glasses, basketball scholarships, parent night with High Tech Crimes Task Force and more. In June 2014 every student received a college T-shirt donated from all over the world. Seeing is believing.
Health

United Way’s health imperatives are about volunteerism and child abuse prevention. Our volunteer engagement continued to increase and our commitment to Jackson County CAN (Child Abuse Network) is unwavering. CAN’s public event to share stories of local children journeying through the trials and tribulations of abuse continues to draw people to downtown each April. And a family fun night was added in 2014.

Income

There is no better way to work toward financial stability for a family than financial literacy and free income tax preparation. The CASH (Creating Assets Savings and Hope) Southern Oregon coalition comes together to do just that. Last year’s free tax preparation sites brought back nearly $3 million to the Rogue Valley! This has tremendous economic impact, equal to a major employer.
Transportation

United Way’s grant through Rogue Valley Transportation District and Oregon Department of Transportation funded Mobility Manager, Connie L. Wilkerson. Connie has worked to improve the public transportation experience with training on how to use the more complex aspects of the bus system. The Project Connect Bike Team is putting used bicycles to work for clients of partner agencies with her guidance.

Funded Partners

43 programs through 35 partner agencies standing on the four strategic pillars of a good life – Education, Income, Health and Transportation – help every other person in Jackson County with direct services. 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 membership dues or fees are charged to agencies belonging to the United Way of Jackson County Federation of the Combined Federal Campaign.
## United Way of Jackson County
### Statement of Financial Position

<table>
<thead>
<tr>
<th></th>
<th>For year ending June 30 2014</th>
<th>For year ending June 30, 2013</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Current Assets</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cash &amp; Cash Equivalents</td>
<td>18,856</td>
<td>39,308</td>
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<tr>
<td>Current Portion of pledges receivable, net</td>
<td>320,315</td>
<td>216,228</td>
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<tr>
<td>Prepaid Expenses</td>
<td>517</td>
<td>967</td>
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<tr>
<td>Other receivables</td>
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<td>538</td>
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<td>Total current assets</td>
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<td>257,041</td>
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<tr>
<td><strong>Property &amp; Equipment, net</strong></td>
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<tr>
<td></td>
<td>8,549</td>
<td>17,632</td>
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<tr>
<td><strong>Current Liabilities</strong></td>
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<tr>
<td>Accounts Payable &amp; Accrued Liabilities</td>
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<td>13,607</td>
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<tr>
<td>Undesignated allocations payable</td>
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<td>Designations payable</td>
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<td>Note Payable - line of credit</td>
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<td>Total Liabilities</td>
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<td>148,253</td>
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<td><strong>Net Assets</strong></td>
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<tr>
<td>Unrestricted</td>
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<td>Temporarily restricted</td>
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<td>Permanently restricted</td>
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<td>113,116</td>
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<td>Total Net Assets</td>
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<td>602,094</td>
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<tr>
<td><strong>Total Liabilities and Net Assets</strong></td>
<td>866,738</td>
<td>750,347</td>
</tr>
</tbody>
</table>
Board of Directors

Anne Ashbey, President  Ashland Independent Film Festival
Bob Wise, First Vice President  KOB1-TV NBC5/KOTI-TV NBC 2
Charlie Bolen, Second Vice President  Hornecker, Cowling, Hassen, Heysell, LLP
Stewart Parmele, Treasurer  KDP, LLP
Teresa Anderson  Harry and David
Amy Belkin  Amy Belkin Coaching + Consulting
Diane Bennett  Key Bank
Marsha Billeci  AmericanWest Bank
Barb Brazier  Community Volunteer
Julie Brown  Rogue Valley Transportation District
Tim Clayton  US Bank
Steve Erb  People’s Bank of Commerce
David L. Gremmels  Rogue Creamery
Tamera Heaton  Regence BlueCross BlueShield
Michele Jones  Community Volunteer
Kim Katic  Wells Fargo
Jason Lukaszewicz  Moss Adams, LLP
Dennis Morgan  Morgan Wealth Management
Nick Parsons  Rogue Credit Union
Francis Plowman  Rogue Creamery
Chela Sanchez  Allstate Insurance Company
Sue Slack  Community Volunteer
Jennifer Susi  Asante Ashland Community Hospital
Dan Thorndike  Medford Fabrication
Rebecca Vega  St. Marys School
Nancy Wilson  Regence Blue Cross Blue Shield

Staff

Dee Anne Everson  Executive Director
Debi Jensen  Office Manager
Broderick Lindeman  Campaign Manager
Talia Matthias  Education Impact Director
Jan Sanderson Taylor  Community Engagement Director
Anna Barnsley Werblow  Finance Director
Connie L. Wilkerson  Mobility Manager