To accomplish great things, we must not only act, but also dream; not only plan, but also believe.

--- Anatole France

Last year was a remarkable year. There are so many things to share in a small space and yet what we know is our organization is filled with those who act, those who plan, those who believe and those who dream! And 2013 saw all of that. And it was a time of transition. We launched the BIG IDEA – 100% High School Completion for the Class of 2020. This is a partnership to turn the tide of high school completion and the victory is the students believe in our dream for them! Last year, HOPE Chest helped 200 families in dire need and free income tax preparation sites brought $2.9 million to our Valley. This is equal to a major employer. Project Community Connect brought together more than 40 agencies to provide services to those experiencing homelessness or near homeless. Services included pet care, bike repair, sewing, haircuts, adjudication, health assessments and more. It is an amazing day of true service. 211info is fully active in our community and if you or someone you know needs help, call them, text them, go to the website! They’re ready to help. We invite you all to act, dream, plan, believe and do great things with us! Here’s to a great new year!
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

- ACCESS Central Point Garden, Target employees, $106.90, 64 hours
- ACCESS Gold Hill Garden, WiLL, $62.86, 112 hours
- ACCESS Medford Garden, Wells Fargo, $57.54, 80 hours
- ACCESS OSU Extension Garden, AmericanWest Bank, $242.74, 120 hours
- Arc of Jackson County, St. Mary’s students, $261.88, 160 hours
- Ashland Supportive Housing, Ashland Cub Scout Troop, $1,507.56, 160 hours
- Center for Nonprofit Legal Services, Goodwill and WiLL, $83.58, 80 hours
- Easter seals, Rogue Credit Union, $1,007.39, 200 hours
- Family Nurturing Center, Anna’s Friends and Fashion Floors team, $6,673.28, 64 hours
- Head Start, Rogue Creamery, $2,043.47, 80 hours
- Kids Unlimited, Rotary After 5, $57.54, 200 hours
- Living Opportunities Central Point, Harry & David, $811.80, 80 hours
- OnTrack, Kristi’s Team, $254.04, 96 hours
- Planned Parenthood, Moss Adams, $85.16, 120 hours
- Rogue Valley YMCA, Pacific Retirement Services, $587.22, 128 hours
- Talent Outdoor School, Providence Health System, $6,676.31, 2,024 hours
Education

The BIG IDEA has arrived! On May 29, 2013, more than 1,000 5th graders converged on the Central Medford High School gym and shared what success means to them, listened to singer Tanner Richie and learned that our community is interested in their success! The BIG IDEA is a 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.
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.
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 $2.9 million dollars to the Rogue Valley! This has tremendous economic impact, equal to a major employer.

Transportation

United Way is the proud recipient of a grant through Rogue Valley Transportation District and Oregon Department of Transportation for mobility management! Watch for exciting news in 2014!

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 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

For year ending June 30, 2013 For six months ending June 30, 2012

Current Assets
- Cash & Cash Equivalents 39,308 54,796
- Current Portion of pledges receivable, net 216,228 257,743
- Prepaid Expenses 967 637
- Other receivables 538 –
  Total current assets 257,041 313,176

Property & Equipment, net 17,632 22,160

Other Assets
- Noncurrent portion of pledges/grants receivable, net 25,813 36,609
- Beneficial interest/OCF 449,861 427,332
  Total Other Assets 475,674 463,941

Total Assets 750,347 799,277

Current Liabilities
- Accounts Payable & Accrued Liabilities 13,607 24,933
- Undesignated allocations payable 35,106 28,032
- Designations payable 99,540 82,216
- Note Payable - line of credit – 35,000
  Total Liabilities 148,253 170,181

Net Assets
- Unrestricted 434,159 438,928
- Temporarily restricted 54,819 77,052
- Permanently restricted 113,116 113,116
  Net Assets 602,094 629,096

Total Liabilities and Net Assets 750,347 799,277

Management – 9.5%
Fundraising – 10.8%
Program – 79.7%
Board of Directors

Cary Jones  HC Solutions
Anne Ashby, First Vice President  Ashland Independent Film Festival
Bob Wise, Second Vice President  KOB1-TV NBC5/KOTI-TV NBC 2
Stewart Parmele, Treasurer  Michael L. Piels CPAs, LLP
Charley Bolen, Secretary  Hornecker, Cowling, Hassen, Heysell, LLP
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
Scott Huddleston  Harry and David
Michele Jones  Community Volunteer
Danny Jordan  Jackson County
Jason Lukaszewicz  Moss Adams, LLP
Dennis Morgan  Morgan Wealth Management
Doug Nash  Harry and David
Nick Parsons  Rogue Credit Union
Lance D. Reyes  Regence Blue Cross, Blue Shield
Sue Slack  Community Volunteer
Jennifer Susi  Asante Ashland Community Hospital
Deelia Warner  US Bank
Nancy Wilson  Regence Blue Cross, Blue Shield

Staff

Dee Anne Everson  Executive Director
Diane Mathews  Deputy Director/Development
Jan Sanderson Taylor  Community Engagement Director
Anna Barnsley Werblow  Finance Director
Debi Jensen  Office Manager
Broderick Lindeman  Accounting Clerk