

EDUCATION. INCOME. HEALTH. TRANSPORTATION



2017-18

Report to the Community

United Way of Jackson County

**United
Way**



A Permanent Home

We all have a different way of saying the idiom, home is where the heart is. I usually share that home is where the heart is, no matter where your heart lives. For me, home hasn't been about permanence. And it's personal because we moved as I was growing up and my dad was being promoted in his work. I went to 6 different schools in my 12 years of schooling. And it didn't seem like a big deal because I had four sisters and we moved as a tribe. When things got tough in our local economy, United Way figured we could save a lot of money paying rent if someone gave us space. For several years, Providence Medford Medical Center gave us space on Spring St. and then when we outgrew it, Banner Bank gave us space. When that came to an end, we had important decisions to make about United Way's future. My personal vagabond ways served United Way well. We researched renting; we researched free space; we researched buying. And we ultimately purchased property and remodeled and moved in all within a few months' time! And it's all paid for – thanks to generous donors. And here we are...home, where the heart of the community is...60 Hawthorne St. Come see us. Check it out. Be inspired. Give. Advocate. Volunteer. You are welcome here.

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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 CEO/executive director.

2017-18 BOARD OF DIRECTORS

Rebecca Vega, President	St.Mary's School
Chris Hilkey, 1st Vice President	Moss Adams LLP
Kristin Milligan, 2nd Vice President	Pacific Retirement Services
Jason Lukaszewicz, Treasurer	Moss Adams LLP
Chris DuBose, Secretary	US Bank
Julie Barry	Ruch Outdoor Community School
Karen Bartalini	Providence Medford Medical Center
Kathy Bauer	John L. Scott Real Estate
Amy Belkin	Teresa McCormick Center
Kristi Bennion	Bennion Orthopedics and LDS Church
Tim Clayton	US Bank
Brande Cowden	People's Bank of Commerce
Helen Funk	Jackson County EXPO
Penny Garrett	Regence BlueCross BlueSheild
Cary Jones	Community Volunteer
Michele Jones	Community Volunteer
Kim Katic	Wells Fargo Bank
Rev. Christina Kukuk	Ashland United Church of Christ
Eean Levin	Wells Fargo Bank
Beth Lindsay	Community Volunteer
Frank Lucas	Community Volunteer
Stewart Parmele	KDP Certified Public Accountants, LLP
Nick Parsons	Rogue Credit Union
Francis Plowman	Rogue Creamery
Lance Reyes	Propel Insurance
Dana Shumate	WorkSource Oregon
Sue Slack	Community Volunteer
Valerie Stein-Retiz	Ashland Tennis & Fitness Club
Jennifer Susi	Asante Health System
Dan Thorndike	Medford Fabrication
Deelia Warner	US Bank
Bob Wise	KOBI-TV NBC5/KOTI-TV NBC 2
Kimberly Young	Community Volunteer

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 New Media Director

UNITED WAY OF JACKSON COUNTY

Statement of Financial Position
 June 30, 2018
 (With Comparative Totals for 2017)

	2018	2017
Assets		
Current Assets:		
Cash and cash equivalents	\$ 61,770	\$ 114,624
Funds held for others	151,792	94,017
Pledges and grants receivable, net	178,070	209,124
Prepaid expenses	1,055	986
Total Current Assets	392,687	418,751
Property and equipment, net	328,236	1,282
Capital campaign pledges receivable, net	144,683	
Investments	150,935	177,231
Assets restricted by donors for long-term purposes	179,452	173,166
Beneficial interest in assets held by others	226,995	224,296
Total Assets	\$ 1,422,988	\$ 994,726
Liabilities and Net Assets		
Current Liabilities:		
Accounts payable and accrued liabilities	\$ 20,198	\$ 6,547
Funds held for others	151,792	94,017
Undesignated allocations payable	20,970	22,332
Designations payable	47,652	65,926
Total Liabilities	240,612	188,822
Net Assets:		
Unrestricted	604,333	334,789
Temporarily restricted	237,932	133,703
Permanently restricted	340,111	337,412
Total Net Assets	1,182,376	805,904
Total Liabilities and Net Assets	\$ 1,422,988	\$ 994,726

Key financial indicators for year ending June 30, 2018, total revenues 6/30/18:

Total Revenues	\$1,412,454
Total Program Expense	\$793,011
Total Administration	\$120,573
Total Fundraising	\$107,845
UWW Dues	\$14,553
Total Expenses	\$1,035,982
Change in Net Assets	\$376,472

United Way of Jackson County has a full time staff of six people and a board of 33 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.

CAMPAIGN

Each year, United Way of Jackson County leverages the caring power of volunteers for the annual fundraising campaign. With the help of 85 community members putting in more than 1,500 volunteer hours, more than \$1.2 million was raised for last year's campaign. United Way runs employee giving campaigns at nearly 200 companies, agencies, institutions and municipalities in Jackson County and in 2016-17, more than 10 percent of our population gave to United Way. The campaign is year-round now accommodating the schedule of donors' desires to give. In addition to the annual United Way campaign, our WiLL, (Women Living Leadership) Council raises funds once a year at a luncheon. This annual luncheon, held in October each year, targets fundraising for helping women and girls Stand Strong by Age 30.



EDUCATION

The Big Idea is now in its 7th year. With more than 1,300 10th graders in the class of 2020, things are always in motion! We have provided direct services for more than 750 Big Idea kids and their families. This year, both Illinois Valley High School and Eagle Point High School had permanent full time graduation coaches after the very successful pilot project the prior year! Dutch Bros. held Dutch University for all the students teaching them gratitude, passion and leadership just like they do for all their employees and franchisees. What a day! It was the first time all the students were together in a Medford School District gym since they were in 6th grade. They seem like they're twice the size. We continued our partnership with OHSU at SOU for the 7th year and surveyed all the students on drop out risk.

We funded 12 different education 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 and community volunteers bring together medical practitioners, pharmacists and others to reduce opioid addiction. In August, just after the start of the coming fiscal year, our community will hold its first Communitywide Overdose Awareness Day. United Way is proud to help sponsor this event. It's critical we get information into people's hands.

We spent a great deal of the year planning for a launch of our next public awareness campaign. Suicide rates are at all-time highs in Jackson County and we will launch a prevention campaign together with AllCare, Jackson Care Connect, Jackson County Health & Human Services, and the Suicide Prevention Council to run across social media platforms and television.

We funded 21 programs through allocations, Day of Caring and WiLL. We have 7 impact partnerships.



INCOME

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 vendor's directly and solve the immediate need.

Project Community Connect is our community's one day outreach to those experiencing homelessness or near homelessness. Volunteer judges, attorneys and legal administrators helped more than 300 people move forward in repairing past legal mistakes. Veterinarians saw 78 pets, and 85 birth certificates were ordered. 176 pairs of glasses were provided and 54 Naloxone kits were given out. This project is successful because of the all 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 \$3.5 million in prescription costs!

We funded 15 programs through allocations, Day of Caring, and WiLL. We have 6 impact partnerships.

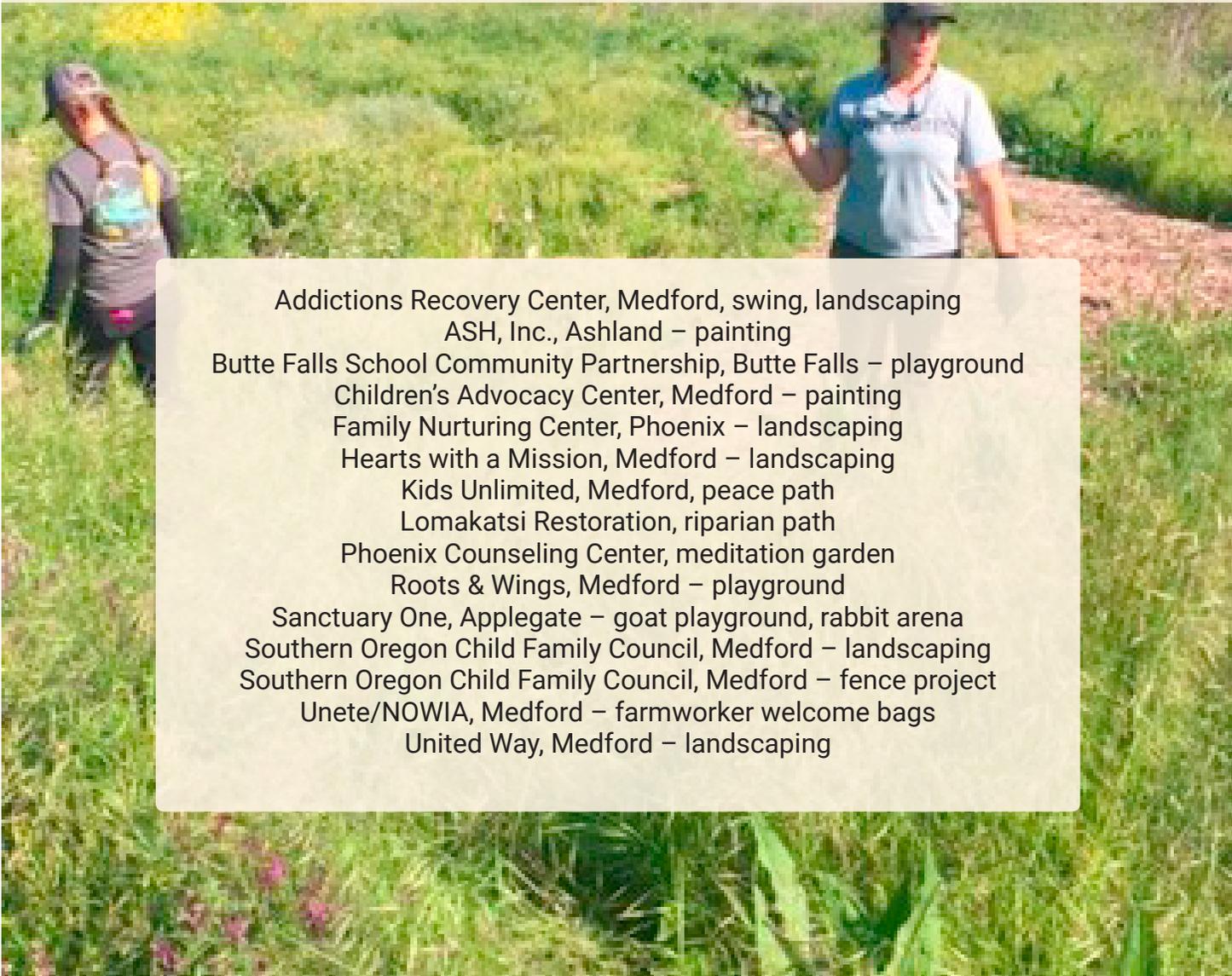
TRANSPORTATION

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 appointment.

We funded two programs and have one impact program.

DAY OF CARING

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

A photograph of two people in a grassy field. On the left, a person is wearing a dark long-sleeved shirt and a backpack. On the right, a person is wearing a light blue t-shirt and a dark cap, holding a pair of gloves. The background shows a dirt path and more greenery.

Addictions Recovery Center, Medford, swing, landscaping
ASH, Inc., Ashland – painting
Butte Falls School Community Partnership, Butte Falls – playground
Children’s Advocacy Center, Medford – painting
Family Nurturing Center, Phoenix – landscaping
Hearts with a Mission, Medford – landscaping
Kids Unlimited, Medford, peace path
Lomakatsi Restoration, riparian path
Phoenix Counseling Center, meditation garden
Roots & Wings, Medford – playground
Sanctuary One, Applegate – goat playground, rabbit arena
Southern Oregon Child Family Council, Medford – landscaping
Southern Oregon Child Family Council, Medford – fence project
Unete/NOWIA, Medford – farmworker welcome bags
United Way, Medford – landscaping





**United Way
of Jackson County**

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