

# UNITED WAY FIGHTS FOR THE EDUCATION, FINANCIAL STABILITY, HEALTH and TRANSPORTATION FOR ALL.



# 2018-19

## Report to the Community

United Way of Jackson County



# We knew inclusion was at the core of who we are as an organization



Thank you for your investment in our community and the trust you place in the United Way and our staff to deliver on the promise of our mission, vision and values. We do this work each day holding that trust with humility. We pride ourselves on our ability to be agile in challenging times and that is reinforced by your support. When the government shutdown happened, United Way was able to gather grants from foundations to support those who wouldn't otherwise qualify for social services! Thank you! Our work remains focused on the building blocks of a good life – education, income, health and transportation. This year, United Way of Jackson County updated our mission and vision and we added inclusion to our values. We knew inclusion was at the core of who we are as an organization and yet we hadn't spoken it. We now do. In addition to that, the Board of Directors adopted the following equity statement:

- **We take** the broadest possible view of diversity as we continue to learn and be inclusive.
- **We value** the visible and invisible qualities that make you who you are.
- **We welcome** that every person brings a unique perspective and experience to advance our mission and progress our fight for the education, income, health, and transportation of every person in our community.
- **We believe** that each United Way partner, donor, volunteer, advocate, employee, and person served must have equal access to solving community problems.
- **We strive** to include diversity, equity, and inclusion practices at the center of our daily work.
- **We commit** to using these practices for our business, our communities, and our relationships. Join us in embracing diversity, equity and inclusion for every person and every family in our community.

Thank you again for your support. Onward,

Dee Anne Everson  
CEO/Executive Director

## **Vision**

Creating positive community change.

## **Mission**

Mobilizing caring to effect change.

## **Values**

Community, Compassion, Empowerment, Inclusion, Integrity, Vision

## **Impact Areas**

Education, Income, Health and Transportation

## **Pillars**

Everyone is housed. Everyone has food. Everyone has health care. Everyone is safe.

## **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.

## 2018-19 Board of Directors

<b>Rebecca Vega, President</b>	St. Mary's School
<b>Kristin Milligan, First Vice President</b>	Community Volunteer Network
<b>Chris DuBose, Second Vice President</b>	First Interstate Bank
<b>Jason Lukaszewicz, Treasurer</b>	Moss Adams LLP
<b>Brande Cowden, Secretary</b>	People's Bank of Commerce
<b>Julie Barry</b>	Ruch Outdoor Community School
<b>Karen Bartalini</b>	Providence Medical Center
<b>Kathy Bauer</b>	John L. Scott Real Estate
<b>Kristi Bennion</b>	Bennion Orthodontics & LDS Church
<b>Charley Bolen</b>	Hornecker, Cowling, Hassen & Heysell
<b>Tim Clayton</b>	US Bank
<b>Steve Erb</b>	People's Bank of Commerce
<b>Helen Funk</b>	Jackson County Expo
<b>Penny Garrett</b>	Regence BlueCross BlueShield
<b>David Gremmels</b>	Rogue Creamery
<b>Michele Jones</b>	Community Volunteer
<b>Rev. Christina Kukuk</b>	Ashland First United Church of Christ
<b>Beth Lindsay</b>	Community Volunteer
<b>Frank Lucas</b>	Community Volunteer
<b>Stewart Parmele</b>	KDP Certified Public Accountants, LLP
<b>Nick Parsons</b>	Rogue Credit Union
<b>Francis Plowman</b>	Community Volunteer
<b>Lance Reyes</b>	Propel Insurance
<b>Sue Slack</b>	Community Volunteer
<b>Valerie Stein-Retiz</b>	Ashland Tennis & Fitness Club
<b>Dan Thorndike</b>	Medford Fabrication
<b>Deelia Warner</b>	Rogue Community College SBDC
<b>Melissa Wolff</b>	Oregon State DHS
<b>Kimberly Young</b>	Community Volunteer

## Staff

<b>Dee Anne Everson</b>	CEO/Executive Director
<b>Jan Sanderson Taylor</b>	Community Impact Director - Income and Transportation
<b>Chris Hilkey</b>	Financial Officer
<b>Debi Jensen</b>	Office Manager
<b>Talia Matthias</b>	Community Impact Director - Education and Health
<b>Troy Ferguson</b>	Campaign and New Media Director



## Education - Increasing High School Completion

The Big Idea Class of 2020 are in the 11th grade and the goal remains 100% high school completion. We have provided direct services for more than 1,100 Big Idea students and their families. We provided 108 donated laptops to high risk students at Eagle Point and Cave Junction. The graduation coaches project was profoundly successful and Eagle Point and Illinois Valley have full time employees! Medford has Click and Connect for their students. We have continued our partnership with OHSU at SOU with student nurses surveying all the students on drop out risk.

In addition, United Way continues to fund programs including Family Nurturing Center, Hearts with a Mission, Kids Unlimited, Resolve, and Roots & Wings. Our volunteers completed Day of Caring projects at Family Nurturing Center Phoenix and Roots & Wings. WiLL (Women Living Leadership) funded numerous women and girls in the education arena.

United Way's total investment in the Education Impact Area is 17% of our annual budget.



## Income – Increasing Family Stability and Independence

VITA (Volunteer Income Tax Assistance): financial literacy and free income tax preparation. Our partnership happens at the Teresa McCormick Center on the Harry & David Campus. Last year, 12 volunteers filed 318 state and Federal returns with refunds totaling \$358,958 with an average refund of \$1,129. The total earned income tax credits coming back to our area from our VITA site was \$128,027.

HOPE Chest helped 304 families with an average investment of \$304. In January 2019, the US government furloughed hundreds of workers in our area. These workers are not high paid staff with a lot of savings and many are young families or older people waiting to retire. Many stretched well into savings by the 7th week without pay. United Way stepped up and built partnerships for food without people having to qualify. We quickly spent more than \$30,000 assisting families with Safeway and Fred Meyer gifts cards valued at \$300 because they had gasoline, sundries, pharmacies and groceries. HOPE Chest received numerous grants for this work.

Project Community Connect is our community's one day outreach to those experiencing homelessness or near homelessness. In its 11th year, there were 485 participants, 27 birth certificates were arranged; 75 IDs were issued; 52 were seen by medical professionals for needed issues; 141 pairs of eyeglasses were distributed; 90 Veterans received direct services and 180 Veterans were signed up for services. Agencies provided 843 hours of help that day!

FamilyWise Prescription Assistance, a national program, was brought to Jackson County by United Way in 2009. Since that time, we have saved local folks \$3.3 million in prescription costs! This year, we have saved 3,426 people \$474,800 on prescriptions. The overwhelming majority of drugs provided on mental health drugs and the average savings per patient is 52%.

Programs receiving allocations are: Center for Nonprofit Legal Services, Community Volunteer Network, Compass House, Consumer Credit Counseling Service, Living Opportunities, and Rogue Retreat. Our volunteers did Day of Caring projects with ACCESS and Unete/ NOWIA. WiLL gave grants to numerous women to gain or stabilize employment.

United Way's total investment in the Income Impact Area is 18% of our budget.







## Health – Maximizing Wellness

United Way of Jackson County proudly launched the In This Together suicide prevention campaign with numerous partners, primarily KOB1-TV NBC5. Our county has a triple the national average suicide rate and this work is crucial to reduce suicide and to help families that have experienced losses.

We have numerous coalition partners in the health area including the Suicide Prevention Coalition, the Child Abuse Project, Early Learning Hub and Southern Oregon Success.

Funded programs include Arc of Jackson County, Asante Health Foundation trauma informed care initiative, ASH, Ashland Family YMCA, CASA, Children's Advocacy Center, Community Works, Compassion Highway Project, Food & Friends, Hope Equestrian, Jackson County SART, La Clinica Mobile Health Unit, Living Opportunities, Max's Mission, OnTrack, Phoenix Counseling Center, Rogue Valley YMCA, Rogue Valley Mentoring and Southern Oregon Child Family Council.

Day of Caring projects were completed at ASH, Inc., Children's Advocacy Center, First Christian Church Community Kitchen, OnTrack, Rogue Valley Veterans and Community Outreach, and The Salvation Army Hope House. WILL made numerous investments in women's health, primarily dental.

United Way's total investment in the Health Impact Area is 35% of our annual budget.





## Transportation – Removing Barriers

United Way supports the Federal United We Ride transportation initiative with innovative programs to remove barriers and increase the availability of transportation for three target populations: people with disabilities, persons of low-income and older adults.

In 2019, our primary goals were to increase access to food from food deserts and access to entertainment for people with disabilities, primarily those in wheelchairs or scooters. In addition, program funding went to Addictions Recovery Center and Community Volunteer Network. WiLL made many transportation-related grants for bus passes and car repairs for women.

United Way's total investment in the Transportation Impact Area is 7% of our budget.

## 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 the annual fundraising campaign. United Way runs employee giving campaigns at nearly 200 companies, agencies, institutions and municipalities in Jackson County and in 2018, 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, target fundraising for helping women and girls Stand Strong. Our annual fundraising costs are 12% of our budget.



UNITED WAY OF JACKSON COUNTY

Statement of Financial Position

June 30, 2019

(With Comparative Totals for 2018)

	2019	2018
<b>Assets</b>		
<b>Current Assets:</b>		
Cash and cash equivalents	\$ 28,333	\$ 61,770
Funds held for others	26,340	151,792
Pledges and grants receivable, net	258,992	178,070
Prepaid expenses	2,636	1,055
<b>Total Current Assets</b>	<b>316,301</b>	<b>392,687</b>
Property and equipment, net	375,555	328,236
Capital campaign pledges receivable, net	26,380	144,683
Investments	182,249	150,935
Assets restricted by donors for long-term purposes	187,666	179,452
Beneficial interest in assets held by others	232,863	226,995
<b>Total Assets</b>	<b>\$ 1,321,014</b>	<b>\$ 1,422,988</b>
<b>Liabilities and Net Assets</b>		
<b>Current Liabilities:</b>		
Accounts payable and accrued liabilities	\$ 7,787	\$ 20,198
Funds held for others	26,340	151,792
Undesignated allocations payable		20,970
Designations payable	57,221	47,652
<b>Total Liabilities</b>	<b>91,348</b>	<b>240,612</b>
<b>Net Assets:</b>		
Without Donor Restrictions	606,690	604,333
With Donor Restrictions	622,976	578,043
<b>Total Net Assets</b>	<b>1,229,666</b>	<b>1,182,376</b>
<b>Total Liabilities and Net Assets</b>	<b>\$ 1,321,014</b>	<b>\$ 1,422,988</b>
Total Revenues	\$1,107,463	
Total Program Expense	\$801,520	
Total Administration	\$128,065	
Total Fundraising	\$117,630	
UWW Dues	\$12,958	
Total Expenses	\$1,060,173	
Change in Net Assets	\$47,290	

**Administration:** United Way of Jackson County has a full time staff of six people and a board of 30 community volunteers. We have more than 1,500 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.



**United Way  
of Jackson County**

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