



# 2014-15 Report to the Community



*Start by doing what's necessary; then do what's possible; and suddenly you are doing the impossible*

*— Francis of Assisi*

As we close our 2015, we look both forward and back. Much lies ahead and the groundwork for the great work ahead comes from the work we did together this year. From bringing over 1,000 students to SOU to preparing taxes and keeping people's lights on through HOPE Chest to funding services that help 2 out of 3 people, United Way of Jackson County remains focused on the building blocks of a good life – education, income, health and transportation.

With the help of 1,700 volunteers who work in our office every week helping with routine tasks to meeting and talking with legislators to affect policy change, it is through your gifts that we do what is necessary, possible and impossible! It is through all of our work that students can see possibilities in their futures. It is through all of our work that families can be strengthened and creates a plan for a stable future with earned tax credits. It is through learning healthier eating and snacking that our families and children can be healthier. And it is through removing barriers to work, to school and to needed appointments that our community gets stronger. All this is due in great measure to your wit, wisdom and wealth.

2015 was a great year and laid the groundwork for what lies ahead. Thank you for being the most important part of it!

A handwritten signature in black ink that reads "DeAnne". The signature is written in a cursive, flowing style.

## 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.

# Education

The Big Idea students went to SOU for a day! And what a day it was! SOU was absolutely amazing and each student had 13 different experiences from physics to theatre to Japanese to science and much more! U.S. Senator Jeff Merkley visited with the Big Ideas students and presented a flag that flew over the U.S. Capitol. In addition to large group experiences like these, more than 620 of the students received direct services such as sports physicals, eye glasses, clothes and more. Graduation rates are increasing and we're on the right path to 100% High School Completion for the Class of 2020.



## Day of Caring



19 years. Check. 11 sites – 2015. Check. 438 volunteers. Check. Day of Caring. Priceless! With 16 teams at 11 different nonprofits, it was the year of the paintbrush! It was even on our shirts. We painted at Addictions Recovery Center, Community Works, Center for Nonprofit Legal Services, Consumer Credit Counseling, Rogue Community Health, Rogue Valley YMCA, Teresa McCormick Center and the Upper Rogue Community Center! We repaired bikes and built shelves and cabinets and even did a little landscaping in between painting!



Join us for our 20<sup>th</sup> year on May 21, 2016.

# Health

Jackson County CAN (Child Abuse Network) has changed its name and not its focus. Now called Rogue Valley CAP (Child Abuse Prevention), the partners presented a family fun night and the storytelling event in the park to raise awareness and to prevent child abuse in our community. CAP remains focused on prevention, public awareness and systems change to protect our Valley's children.

United Way is a partner in the Great Start, Eat Smart group and has helped to distribute thousands of DVDs with cooking and healthy snack demonstrations. If you're interested, give us a call!

FamilyWise Prescription Assistance has continued to save Jackson County folks money on needed medication. Since 2009, \$1,376,000 in savings has been provided!

# Income

HOPE Chest continues to help people with emergency needs from rent and utility assistance to car repairs to keep jobs. Our VITA (Volunteer Income Tax Assistance) site hosted a visit from Congressman Greg Walden. VITA, in partnership with AARP TaxAide brings more than \$3 million back to Valley residents in earned tax credits.

Project Community Connect held its 7<sup>th</sup> annual event with 50 local agencies helping bringing vital services to people experiencing homelessness or near homelessness. With more than 100 volunteers, 770 people received services from haircuts, veterinary care for their animals, bus passes, bike repairs, and more.



# Transportation

**Our efforts to reduce barriers to transportation are rolling along (pun intended)! By bringing together partners to improve the transportation system, this work is making a difference. In addition to the policy work, our mobility manager provides group and individual travel trainings. Watch next year for Bike Share for the People of Jackson County! It launches in July 2015! Hop on!**



# Funded Partners

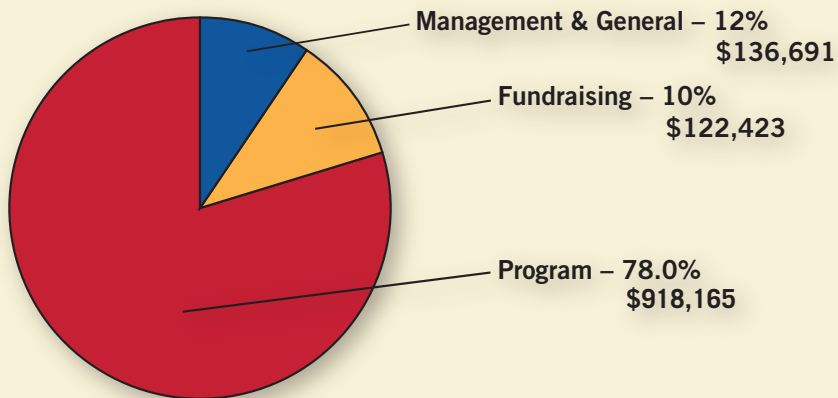
In addition to our impact work, we remain focused on our strategic investments in education, income, health and transportation funded programs. We provide critically needed resources to 48 programs serving 2 out of 3 Jackson County residents. These investments cover from prenatal care to bereavement counseling and much of life that falls in between.

All donations share in the cost of fundraising and administration along with a three-year rolling average of pledge loss. No membership dues or fees are charged to agencies receiving funding or members of the United Way of Jackson County federation of the Combined Federal Campaign.

UNITED WAY OF JACKSON COUNTY

Statement of Financial Position  
June 30, 2015  
(With Comparative Totals for 2014)

	(As Restated Note 13)	
	2015	2014
<b>Assets</b>		
<b>Current Assets:</b>		
Cash and cash equivalents	\$ 30,957	\$ 52,698
Current portion of pledges and grants receivable, net	204,584	238,170
Prepaid expenses	808	517
<b>Total Current Assets</b>	<b>236,349</b>	<b>291,385</b>
Property and equipment, net	5,484	8,549
<b>Other Assets:</b>		
Noncurrent portion of pledges and grants receivable, net	11,048	18,201
Beneficial interest in assets held by others	699,622	674,410
<b>Total Other Assets</b>	<b>710,670</b>	<b>692,611</b>
<b>Total Assets</b>	<b>\$ 952,503</b>	<b>\$ 992,545</b>
<b>Liabilities and Net Assets</b>		
<b>Current Liabilities:</b>		
Accounts payable and accrued liabilities	\$ 25,662	\$ 50,878
Undesignated allocations payable	27,404	36,224
Designations payable	68,760	79,999
Note payable - line of credit	25,000	35,000
<b>Total Liabilities</b>	<b>146,826</b>	<b>202,101</b>
<b>Net Assets:</b>		
Unrestricted	440,654	454,336
Temporarily restricted	31,000	48,882
Permanently restricted	334,023	287,226
<b>Total Net Assets</b>	<b>805,677</b>	<b>790,444</b>
<b>Total Liabilities and Net Assets</b>	<b>\$ 952,503</b>	<b>\$ 992,545</b>



# Board of Directors

- Bob Wise, President** KOB1-TV NBC5/KOTI-TV NBC 2
- Charley Bolen, First Vice President** Hornecker, Cowling, Hassen, Heysell, LLP
- Jennifer Susi, Second Vice President** Asante Rogue Regional Medical Center
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- Karen Bartalini** Providence Medford Medical Center
- Amy Belkin** Teresa McCormick Center of Harry & David
- Barb Brazier** Community Volunteer
- Tim Clayton** US Bank
- Brad Earl** Medford School District
- Steve Erb** People's Bank of Commerce
- David L. Gremmels** Rogue Creamery
- Tamera Heaton** Regence BlueCross BlueShield
- Cary Jones** HC Solutions, Inc.
- \*Fawn Jones** Community Volunteer
- \*Eean Levin** Wells Fargo Bank
- \*Beth Lindsay** Community Volunteer
- Frank Lucas** Community Volunteer
- \*Kristin Milligan** Pacific Retirement Services
- Dennis Morgan** Morgan Woods
- Nick Parsons** Rogue Credit Union
- Francis Plowman** Rogue Creamery
- \*\*Rick Rankin** Providence Medical Group
- Suzanne Schmidt** Banner Bank (formerly: AmericanWest Bank)
- Dana Shumate** Community Volunteer
- Sue Slack** Community Volunteer
- Valerie Stein-Retiz** Ashland Tennis Club
- Dan Thorndike** Medford Fabrication
- Melissa Wolff** State of Oregon

## Staff

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



**United Way  
of Jackson County**

[UnitedWayofJacksonCounty.org](http://UnitedWayofJacksonCounty.org)

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