



# ANNUAL REPORT 2015

## UNITED WAY OF OL MSTED COUNTY

April 1, 2014 – March 31, 2015



United Way  
of Olmsted County



## Extraordinary accomplishments happen when we work together as a community and LIVE UNITED!

By combining the resources donated by thousands throughout our community with strategies grounded in research, we are able to partner with area programs to ensure the highest level of quality and accountability.

United Way of Olmsted County leads change in our community. As a recognized leader with broad involvement in multiple areas, we are effective at convening stakeholders, collaborating with others and connecting resources to improve lives in our community.

### It's about long-term community change, not charity. It's about inspiring hope for those who need it most.

Education, income, and health are the building blocks that represent the foundation to a good quality of life, however they are not discrete domains, but rather interconnected facets of life. For example, children often find it difficult to succeed in school if they have unattended dental needs, if they're moving from house to house, or hungry due to financial or food insecurity. Our entire community benefits when every child succeeds in school, when people are in good health, and when families are self-sustaining and financially stable.

In this report, you'll see exactly how our community is strengthening these building blocks to help people in need reach their potential. Throughout the last year, United Way of Olmsted County has celebrated many accomplishments. As our community united around improving lives, we also revitalized our work to ensure United Way is making the biggest impact possible.

### Highlights of our 2014-2015 year include:

- Helping 34,000+ people in need reach their potential
- Raising \$4,130,000 in our annual campaign
- Engaging 1,154 volunteers to help achieve these results
- Introducing Jerome Ferson as our president in October 2014 and Chad Campbell as VP of Community Impact in March
- Heightened community attention on key community conditions and disparities in outcomes experienced by minority and economically disadvantaged community members
- Providing 4,022 backpacks and school supply kits to local students
- Distributing 1,993 winter coats to people in need

Thank you to our donors, volunteers, program partners, and the community at large for accomplishing these incredible achievements. Everyone has a stake in creating a prosperous, healthy community.

United Way of Olmsted County works in collaboration with many people and organizations to help build a great place for all of us to live, work and play. We are grateful for your involvement and contributions to our community through your support of United Way. We are hopeful about the future and you should be too.

Sincerely,



Joanne Rosener  
Board Chair, 2014-2015



Jerome Ferson  
President

# LIVE UNITED



## United Way of Olmsted County

### Mission

Uniting people and resources to improve people's lives in our community.

### Vision

To be an agent of community change that inspires hope, creates opportunity, and champions people in need.

### History

United Way of Olmsted County was established in 1925 as a community chest fund, and has emerged in the past decade as a community impact organization. The development of the community impact model is the product of a long history that has built upon nearly a century of work to help create a better, stronger and more vibrant community in Olmsted County. Through its entire 90 year history, working together in support of people in need has been the central focus.

### Contact

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[uwoc@uwolmsted.org](mailto:uwoc@uwolmsted.org)  
(507) 287-2000



**Running Start for School** collects backpacks and school supplies throughout the summer months and distributes the donated supplies to children who are eligible for free or reduced lunch.



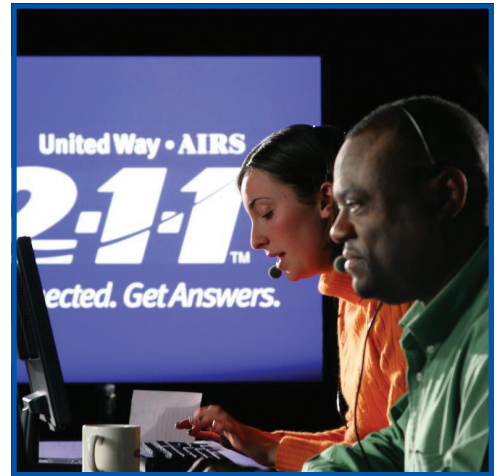
**Get Connected**, United Way's online tool to connect volunteers to opportunities and events, allows people to volunteer with local organizations that fit the volunteer's schedule and interests.

**The Free Tax Preparation Initiative** connects low to moderate income families to opportunities to file their taxes for free. This assistance often results in filers receiving additional money through the Earned Income Tax Credit.



**The Community Gang Initiative**, convened and coordinated by United Way, is a community plan of action to address youth and adult gang issues in the Rochester area.

**Community Winter Outerwear** collects winter coats and other items are throughout September and October to help individuals and families stay warm each winter.



**Imagination Library** provides all children living in Olmsted County the opportunity to receive a free, age-appropriate book in the mail each month from birth to their fifth birthday. Each book is selected for the developmental benefits it brings.

**2-1-1** is a free, confidential, and multilingual human service phone resource. Information is available 24 hours a day on a variety of topics including childcare, counseling, food, health services, housing, legal assistance, transportation, volunteering, and more.

# Community Report

Olmsted County is a great community – it's a place of caring and opportunity. United Way of Olmsted County's purpose is to work consistently to improve lives and ensure that people in need have the access to the opportunity to reach their potential. These reports provide a window into work accomplished this year to deliver access to the building blocks that are the foundation to a good quality life – education, income, health and basic needs. United Way works in partnership with many organizations to achieve results that transform lives, families, and the community.

**When we LIVE UNITED,  
Olmsted County is a great  
community – for everyone.**

## EDUCATION

### Goal:

*Children and youth reach their potential in school and in the community.*

### Youth Development

**2,866**

youth participated in quality out-of-school programs partnering with United Way.

#### Why This Matters:

Every \$1 invested in out-of-school-time programs results in a \$10.51 return with the benefits of improved school performance, reduced crime and welfare costs, and increased wages.

### School Readiness

**1,096**

children in United Way partner programs achieved age-appropriate developmental milestones and proficiency.

#### Why This Matters:

Only 51% percent of Minnesota kindergarteners are fully ready for kindergarten in the areas of language and literacy.

### Early Literacy

**1,040**

volunteers hours dedicated to helping 196 children improve their reading skills.

#### Why This Matters:

Literacy is a critical skill for school, work and life success. One in three 4th graders score below "basic" in reading on the National Assessment of Educational Progress.

## HEALTH

### Goal:

*Individuals are physically and mentally healthy.*

### Dental Health

**1,382**

children receiving preventative dental care and education from United Way program partners.

#### Why This Matters:

In 2013, only 35% of the 11,000 Olmsted County children enrolled in the MN Health Care Program received any preventative dental care. Tooth decay is nearly 100% preventable and is the most common chronic childhood disease.

### Mental Health

**1,966**

people receiving early interventions for mental illness in community settings from United Way program partners.

#### Why This Matters:

1 in 4 adults – approximately 61.5 million Americans – experiences mental illness in a given year. 1 in 17 – about 13.6 million – live with a serious mental illness.

### Health Insurance

**2,791**

people obtain or retain health insurance through referrals from United Way program partners.

#### Why This Matters:

In 2013, 30% of uninsured adults went without needed medical care due to cost.

**LIVING UNITED,**  
more children start  
school ready to learn,  
succeed and graduate.

**LIVING UNITED,**  
people are healthier.

**LIVING UNITED,**  
families are  
financially stable  
and self-reliant.

## INCOME

**Goal:**  
*Individuals and families  
are financially stable.*

### Job Training and Employment

**199**

people living below  
280% of poverty  
receiving job skills  
training or have gained  
stabilized employment  
with the help of United  
Way program partners.

**Why This Matters:**  
While almost 50% of U.S.  
workers over 25 years  
old have a minimum of  
a high school education  
or less, there is a  
sizable segment of the  
current workforce that is  
unprepared to succeed in  
today's economy.

### Housing Stabilization

**134**

low income families  
achieve stabilized  
housing with United Way  
program partners' help.

**Why This Matters:**  
Between 200- 300  
families are dealing  
with homelessness in  
Olmsted County. Housing  
instability is directly  
linked to poor health  
outcomes, educational  
outcomes and  
employment outcomes.

### Asset Building

**385**

low income people  
participated in financial  
literacy coaching this year.

**Why This Matters:**  
People who understand  
money management  
and the importance of  
banking, budgeting  
and savings are better  
equipped for a successful  
financial future. Over  
\$4 million in tax  
refunds were returned  
to low income people  
participating in the free  
tax preparation program  
in Olmsted County.

## BASIC NEEDS

**Goal:**  
*People's basic needs  
are met.*

### Senior Independence

**810**

seniors receive support  
to remain in their own  
homes thanks to the  
work of United Way's  
program partners.

**Why This Matters:**  
The Dept. of Health and  
Human Services estimates  
that 70% of people who  
reach age 65 will need  
some type of long-term  
care. Appropriate housing  
with supportive services  
can be the difference  
between independent  
living and care in an  
institutional setting.

### Safety

**776**

children in-need  
experienced safe  
interactions with  
caregivers.

**Why This Matters:**  
A child is abused or  
neglected every 47 secs.  
Nearly 70% of child  
abuse victims are under  
the age of 5. By providing  
child abuse prevention  
and early intervention  
services, programs  
supported by United  
Way assist individuals  
and families with issues  
before they escalate.

### Access to Food

**22,144**

vulnerable residents  
have access to  
nutritious food.

**Why This Matters:**  
Hunger affects all  
people in the U.S. and  
all ages. Food insecurity  
is harmful to all people,  
but it is particularly  
devastating to children.  
Proper nutrition is critical  
to a child's development.  
In Olmsted County, 8.9%  
of the total population  
is food insecure and  
nearly 5,000 of them  
are children.

# Financials

Revenue, expenses, assets, and liabilities for the year April 1, 2014 – March 31, 2015. Visit [www.uwolmsted.org/accountability](http://www.uwolmsted.org/accountability) to view the organization's full audit report.

## REVENUE & EXPENSES

### Revenue

Public Support	\$4,172,661
Estimated Uncollectible	-\$149,267
Programs & Grants	\$138,355
Building Rental	\$9,577
Administrative Fees	\$17,865
Investment Income	\$133,158

**Total Revenue** **\$4,322,349**

### Expenses

Grants and Program Services (Community Fund)	\$2,744,685
Donor Selected Designations	\$832,988
Development & Fundraising	\$397,042
Management & General	\$288,520
United Way Worldwide Dues	\$39,369

**Total Expenses** **\$4,302,604**

**Change in Net Assets** **\$19,745**

## ASSETS & LIABILITIES

### Assets

Current Assets	\$5,118,252
Property & Equipment	\$650,127

**Total Assets** **\$5,768,379**

### Liabilities

Current Liabilities	\$1,141,702
Long-term Liabilities	\$77,949

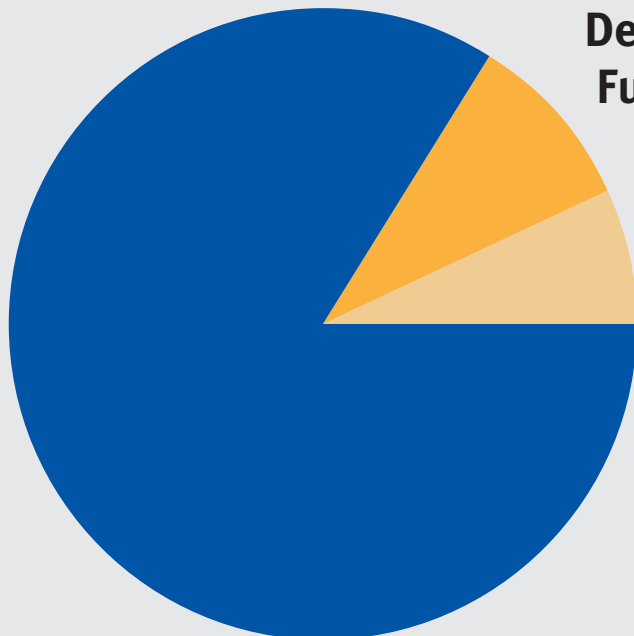
**Total Liabilities** **\$1,219,651**

**Net Assets** **\$4,548,728**

**Liabilities and Net Assets** **\$5,768,379**

## Expenses

**Program: 84%**



**Development and  
Fundraising: 9%**

**Management and  
General: 7%**



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# Giving with Confidence

With a commitment to transparency, accountability and results, United Way of Olmsted County enables you to make a difference right where you live and see the difference you are making.



## Charities Review Council: Meets Standards Seal

United Way of Olmsted County meets all 27 Accountability Standards of the Charities Review Council. National guidelines allow for up to 30 percent of donations to be spent on administrative costs. We spend approximately 15 percent.



## Charity Navigator: 4 out of 4 Star Rating

Receiving four out of four stars indicates that your organization adheres to good governance and other best practices that minimize the chance of unethical activities and consistently executes its mission in a fiscally responsible way. United Way is one of just three nonprofit organizations in Olmsted County to receive this honor.



## United Way Worldwide Membership Standards: Completed

Every year, each United Way is required to adhere to a set of standards and requirements that have been dictated by United Way World Wide. In order to use the United Way name and logo, United Way of Olmsted County must successfully prove its compliance with these rigorous membership standards on an annual basis.

## Community Fund Programs

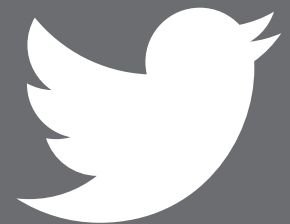
**Education:**  
**\$1,249,739**

**Income:**  
**\$232,842**



**Basic Needs:**  
**\$812,399**

**Health:**  
**\$449,705**



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uwolmsted](http://www.twitter.com/uwolmsted)

## Board of Directors

United Way of Olmsted County's board of directors is foremost a guardian of values on behalf of its stakeholders. The board of directors provide strategic leadership and vision through the creation of the strategic plan and policies.

**Joanne Rosener**  
Board Chair  
Mayo Clinic (Retired)

**Chris Nelson**  
Vice Chair  
Dunlap & Seeger, P.A.

**Betty Hutchins**  
Past Chair  
Mayo Clinic

**Toni Adafin**  
IBM

**Patricia Barrier**  
Mayo Clinic (Retired)

**Randy Chapman**  
Post-Bulletin

**John Edmonds**  
Olmsted County

**Jeff Elstad**  
Byron Public Schools

**Paul Fleissner**  
Olmsted County

**Jeffrey Hazard**  
McGladery, LLP

## Staff

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President

**Anne Berberich**  
Interim President, COO, SVP  
Resource Development

**Kris Brewer**  
Community and Corporate  
Engagement Director

**Chad Campbell**  
Vice President of  
Community Impact

**Meredith Duda**  
Leap 2 Literacy  
AmeriCorps VISTA

**Deneene Graham**  
Community Impact Specialist

**Michelle Jacobson**  
Community Impact  
Administrative Assistant

**Tory Johnson**  
IBM

**Walt Ling**  
IBM

**Brad Lohrbach**  
Family Service Rochester

**Kelly McDonough**  
First Alliance Credit Union

**Michael Muñoz**  
Rochester Public Schools

**Wendy Shannon**  
Winona State University

**Dave Stenhaus**  
Wells Fargo Wealth  
Management Group

**Don Supalla**  
GRAUC, RCTC (Retired)

**Emily Ties**  
Mayo Clinic

**Diane Wottreng**  
Mayo Clinic (Retired)

**Matt Knutson**  
Communications and  
Events Director

**Dale O'Groske**  
Chief Financial Officer

**Kelly Olsgard**  
Campaign Specialist

**Lindsey Nelson**  
Campaign Specialist

**Bonnie Schultz**  
Major Gifts and Planned  
Giving Director

**Mary Jo Tittl**  
Community Impact Specialist

**Pam Wright**  
Executive Assistant

## Program Partners

### Education

Boys & Girls Club – Teen Ascent, Youth Development  
Byron Community Education – Success by 6  
Children of Destiny – Sports Mentorship Academy  
Civic League Day Nursery – Success by 6  
Families First of Minnesota – Success by 6  
Family & Children's Center – Rochester Youth Night  
Campus (Recreational Therapy)  
Girl Scouts of MN WI River Valleys – Girl Scout  
ConnectZ  
Good News Children's Center – Success by 6  
LEAD Mentorship Program, Olmsted County  
Quarry Hill Nature Center – Olmsted Outdoors,  
Teen Ascent  
The Reading Center – Teacher Training  
Tri-Valley Opportunity Council – Success by 6  
Rochester Area Family YMCA – Y-Mentors, Y-Youth  
Student and Family Engagement (SAFE),  
Rochester Public Schools  
Teacher Training for Literacy,  
Rochester Public Schools

### Health

Center City Housing, Silver Creek Corner  
Children's Dental Health Services –  
Olmsted Happy Teeth  
Family Service Rochester – Families Matter  
Intercultural Mutual Assistance Association (IMAA) –  
Community Health Worker  
NAMI SE MN – Families Matter  
The Salvation Army – Good Samaritan Health Clinic  
Zumbro Valley Health Center – Rapid Access Clinic

### Income

Catholic Charities – Financial Literacy,  
Refugee Resettlement  
Family Promise Rochester – Family Stabilizer  
Hawthorne Education Center – Pathways to College  
and Career  
The Salvation Army – Transitional Living Case Aid  
and Rapid Rehousing

### Basic Needs

Ability Building Center – Southern Minnesota  
Assistive Technology Center,  
Supported Employment  
Channel One Regional Food Bank  
Elder Network – Senior Independence Collaborative  
Families First of Minnesota – Crisis Nursery  
Family Service Rochester – Family Access Center  
and Project Restore, Meals on Wheels,  
Senior Independence Collaborative  
Legal Assistance of Olmsted County  
PossAbilities – Supported Employment  
The Salvation Army – Noon Meal, Rent Assistance,  
Senior Independence Collaborative