



ANNUAL REPORT 2015

UNITED WAY OF OLMSTED 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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903 West Center Street, Suite 100
Rochester, MN 55902

www.uwolmsted.org
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.



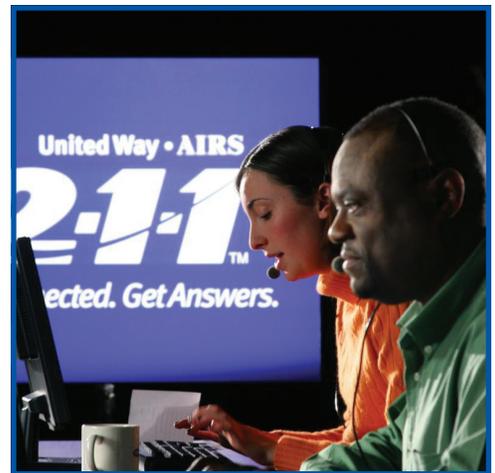
Get Connected, United Way's online tool to connect volunteers to opportunities and events, allows people to volunteer with local organizations that fit the volunteer's schedule and interests.

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 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

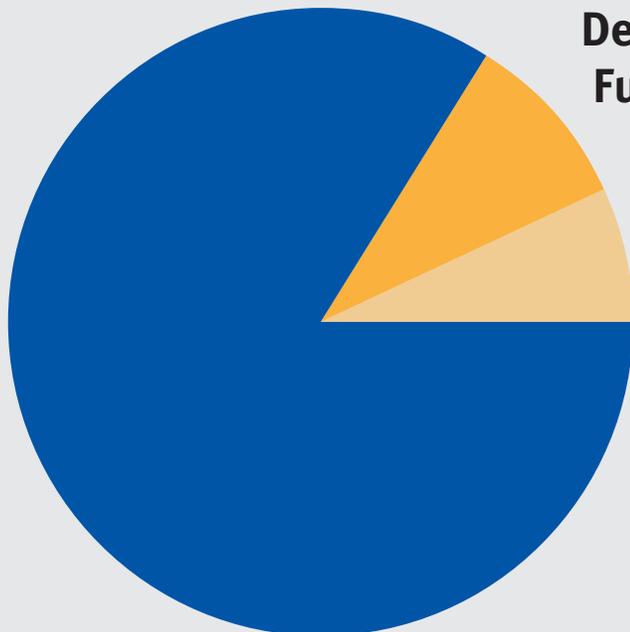
Total Liabilities **\$1,219,651**

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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[www.facebook.com/
uwolmsted](http://www.facebook.com/uwolmsted)

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.



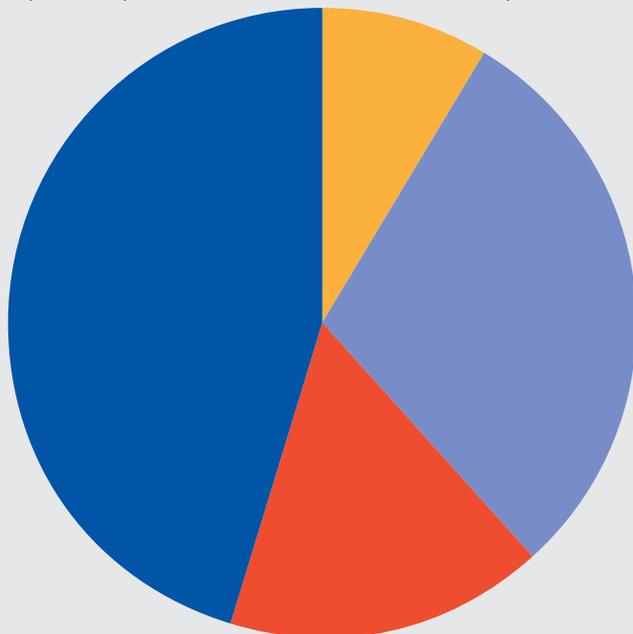
United Way Worldwide Membership Standards: Completed

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

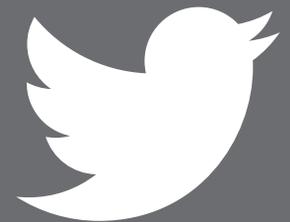
Education:
\$1,249,739

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

Jerome Ferson
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