



what matters.™

Roane County United Way 2004 Annual Report

What is United Way?

United Way is an organization that brings volunteers, individuals and companies together throughout Roane County in order to improve people's lives. Businesses and individuals can respond to multiple charity requests through one effort and agencies can raise more money much more efficiently than by conducting separate workplace campaigns on their own.

With an annual campaign each fall, the Roane County United Way is able to fund 29 member agencies. The dollars pledged through the fall United Way campaign are collected and distributed the following calendar year to those agencies.

There are United Way agencies and programs you may not have heard of before. What makes United Way so effective is that clients who are served by some of those lesser-known programs do not fall through the cracks. With just one gift, whether you use payroll deduction or write one check, you are helping those in your community.

United Way knows that people like you really want to make a difference in your community. You want to help others. We want to be your partner.

We will bring together people from all across the community – people from government, business, faith groups, nonprofits, and ordinary citizens - to tackle the issues that matter most.

United Way is focused on the bottom-line results – the lives we change and the communities we shape.

United Way of America Mission. . .

To improve lives by mobilizing the caring power of communities.

We dedicate this annual report to you – the

people who are United Way. Each year, you give of yourself so that others won't be forgotten. You are the reason for another successful campaign and we invite you to look through the next few pages to see what your work has accomplished.

Your volunteer efforts are why we can operate effectively and efficiently. Because of the time you spend conducting workplace campaigns, analyzing community needs and making funding recommendations, we can give donors the assurance that their gifts are used accountably and our costs remain low.

As the needs arise and costs of programs and solutions continue to increase, our community needs to know that United Way will be there to help. Thanks to you we can.

Thanks to you, Roane County United Way will be able to accomplish its mission of bringing people and resources together to meet the needs of our community.

The primary interest of United Way is people. The strength of United Way is people.

It's What Matters!

**A Message from the
Board Chair.....**

Steve Kaye

This past year started out in a dramatic and challenging way for Roane County United Way as we accepted the new challenge of the United Way of America to embrace their new strategic objectives for all United Ways. We were urged to identify critical needs in our community, and to focus our resources where they will have impacts that result in meeting these critical needs. Additionally, we were urged to get to know our donors better because there has been a tendency for United Ways to often deal with the workplace and not the individual. Other challenges were also issued, but they are more operational and do not directly involve our donors and supported agencies directly.

The programmatic changes necessary to shift emphasis from supporting infrastructure to identifying the most critical needs in our community will take a few years to achieve. We are very fortunate that we have been able to identify our community's most critical needs through the just issued report, *"Nine Counties One Vision"*. This report represents several years of work by the University of Tennessee and presents a compilation of information that we will use for guidance in serving the people of Roane County.

The Roane County United Way was able to recognize its major donors with a Leadership Givers Appreciation Dinner hosted at the Whitestone Inn. This enjoyable evening was enhanced by the presentation of a print of an original commissioned watercolor donated by a local artist. The appreciation dinner will now be a regular annual affair.

Your United Way Board of Directors has completed a very busy year and has a number of achievements that are noteworthy. One that stands out among these is our new quarterly newsletter, "United Way Matters", which has received wide circulation in the county. Work is also progressing on a new web site that will further strengthen our relationship with our community.

The "Day of Caring" launched our annual fund raising campaign again this year, and represented a busy day of work by individuals who volunteered for four work projects chosen to improve life in our community. Darryl Meadows chaired the 2004 Roane County United Way Campaign which raised approximately \$330,000.. While this amount was slightly below our goal, it represents a great effort on the part of both Darryl in serving our community and of the residents of Roane County for trying to maintain our county as a place that cares.

We have a challenge in this coming year to identify and encourage more business and individuals in Roane County to support the annual United Way Campaign. We have lost some of our leadership givers from the Oak Ridge facilities as they have retired and moved to other areas. Your board is making plans to offset these losses in contributions. The potential is there; the challenge is WHAT MATTERS!

2004/05 Roane County United Way Board of Directors

Executive Committee and Officers

Steve Kaye, Chairman
Poppoh Technical Services

Benny Headrick, Treas.
Jefferson Federal Bank

Janice Bardill, 1st Vice Chair
CFO, Roane Medical Center

Carol Grametbauer, Secy
Retired, BWXT Y12.

Kathy Cole, 2nd Vice Chair
Retired, Roane Medical Center

Board Members

Susan Alexander
Human Resources, BWXT Y12

Bill Mixon
Retired, ORNL

Edgar Bowers
Retired, Lockheed Martin
Tennessee Board of Regents

Greg Pugh
Jefferson Federal Bank

Margaret Brogdon
Roane Realty

Tony Medley
ORNL

Board members serve for a term of three years. Board meetings are held on the third Monday of each month. Meetings are held at the United Way, 2735 Roane State Highway, Harriman, Tennessee.

The Year in Review. . . The Roane County United Way is active all year long. Through our Social Services program, we coordinate resources among agencies serving as a community link. Below are some highlights of our activities throughout the past year.

First Quarter -

Participated on the Nine Counties.One Vision Social Services Task Force

Facilitated implementation of the Emergency Food & Shelter National Board Program

Participated with the United Ways of Tennessee State Organization

Facilitated the Roane County Annual Meeting and Campaign Awards Luncheon

Planned and implemented our first Leadership Givers Reception and Dinner

Continued to co-facilitate Community of Promise Initiative

Second Quarter –

Participated in the United Way of America's Leadership Forum

Met with DOE contractors to begin campaign planning

Held annual Roane County United Way Board planning retreat

Attended United Ways of Tennessee Statewide Training Conference

Began coordination of Day of Caring community projects

Set campaign goal of \$360,00

Third Quarter –

Conducted and or participated in company campaign training sessions

Conducted local campaign coordinator training

Conducted Allocation volunteer training sessions

Kicked off Campaign with Day of Caring

Began exploring feasibility of implementing a VITA/ EITC program (Volunteer Income Tax Assistance)

Construction begins on new United Way offices

Fourth Quarter –

Campaign Activities Continued

Allocation Review Process

2005 Allocations set and Agencies notified

Roane County United Way approved as a VITA site by IRS

NineCounties.OneVision Social Services Task Force introduces the completed regional needs assessment

**A Message from our
2004/05 Campaign
Chairman.....**

Darryl Meadows

I was pleased and honored when Diana Knobloch asked me to serve as Campaign Chair for this year's United Way campaign. My first inclination was to tell her that, based on all my other duties and responsibilities, I didn't have time. However, I could not do this. Roane County is my home, and the least I could give to the United Way was my time and efforts.

Many people take the services the United Way helps fund for granted. Perhaps they are lucky enough to not need them. However, if they are fortunate enough to see their child or grandchild at an area city league ballgame, or unfortunately need the services of the Roane County Rescue Squad, they are experiencing United Way's help. United Way does not discriminate. It helps the young, old, rich and poor.

We set an aggressive giving goal this year. To date, we have raised 93% of this figure. While this seems low, it is over 100% of last year's goal. Overall, I am pleased, especially since the local economy is just now coming out of slowdown. This would not have occurred but for the extraordinary efforts of area individuals and large and small businesses.

As our campaign ends, I want to personally thank all those who gave their time and money to this campaign. I am extremely grateful for your generosity. You have made a difference in the quality of life in Roane County and I thank you for your support.

**A Message from the
Allocation Chairman.....**

Kathy Cole

The Allocations Committee fulfills two purposes. The first is to effectively and responsibly distribute funds raised. The second is the education of community volunteers to the services United Way agencies provide and the specific financial needs of those agencies.

United Way board members chair the individual panels with community volunteers representing a cross section of Roane County citizens. The panel categories are Self-Sufficiency Services, Crisis Intervention, Family and Senior Services, Emergency Services, Health and Rehabilitation Services and Youth Services. Each of the agencies supported by our United Way is placed in one of these six panels. The panels review the individual requests, hear presentations by agency representatives, and where appropriate, conduct on-site visits.

This year's campaign fell short of the \$360,000 goal, reaching approximately 93% of that goal at the time of this report. The Allocations Committee worked diligently to arrive at a fair allocations budget for the participating agencies. Due to the increasing needs of seniors qualifying for home delivered meals & an existing waiting list, the panel felt that every effort should be made to fund this program at the highest level. Concerning Crisis Intervention Agencies, the allocations panel would like to see this group of agencies work better to streamline services, seeing too much duplication of service efforts among these groups. Plans are underway for United Way to host a forum of all emergency service provider agencies to begin dialogue toward this effort. No new agencies requested funding this year. Grants were allocated for the following agencies/needs with funds for these grants to come out of Social Services Surplus funds: Roane Health Council–Child Obesity Prevention Program, Child Advocacy Center–Training for case workers, Epilepsy Foundation–To continue education, & YWCA–To reinstate their national dues.

A Transitional Task Force will begin meeting in April to look at how United Ways will function with each other as well as how the allocations process will change over the next two years to meet the guidelines set forth by United Ways of America.

This group will be made up of 3 Board members, a member from each of the 6 panel this year, and 3 community at large members. The Nine Counties, One Vision Needs Assessment has been completed and will be very valuable in determining what the community needs.

We want to thank this year's allocation volunteers for their time and dedication to making our county a caring community where individuals, families and neighbors thrive.

2004/05 Allocation Volunteer Panels

Strengthening and Supporting Families & Seniors –

Candy Lett (Chair), Nancy Newcomb, Jim Lett, Laura Overstreet, and Ted Taylor

Health and Rehabilitation Services –

Janice Bardill (Chair), Ken Beauchamp, Rick Ross, JoAnn Knies, and Tom Pickel

Helping Kids Succeed –

Greg Pugh (Chair), Rhonda Kodman, Jeff Woods, Barney Dickey, Josh Igou, Tony Malinauskas

Promoting Self-Sufficiency –

Kathy Cole (Chair) – Bob Henderson, Fred Taylor, Judy Tyl, JoBelle Masters, and Lynn Spires

Crisis Intervention –

Tony Medley (Chair) – Teresa Ferguson, Greg Palko, John Sublett, Mike Emery Bill Mixon and Buddy Bowers

Protecting Community Well-Being –

Benny Headrick (Chair), Nathan Howard, Don Davis, Bobby Davis and Tim Carroll

Community Investments

| | 2004 | 2005 |
|-------------------------------------|------------------|------------------|
| 4H Volunteers | \$ 5,700 | \$ 5,700 |
| East Roane County VFD | \$ 6,000 | \$ 6,500 |
| South Roane County VFD | \$ 6,000 | \$ 6,500 |
| West Roane County VFD | \$ 3,125 | \$ 4,000 |
| Boy Scouts | \$ 11,000 | \$ 10,000 |
| CASA of the Tennessee Heartland | \$ 6,000 | \$ 5,000 |
| Character Counts in Roane County | \$ 3,000 | \$ 4,000 |
| Child & Family Tennessee | \$ 11,500 | \$ 9,500 |
| Children's Fund | \$ 3,500 | \$ 3,500 |
| Council on Aging | \$ 3,000 | \$ 3,000 |
| Eagles of the MDC | \$ 500 | \$ 500 |
| FISH of Roane County | \$ 8,000 | \$ 7,500 |
| Florence Crittenton Agency | \$ 3,012 | \$ 3,012 |
| STARS – Florence Crittenton | \$ 5,459 | \$ 5,459 |
| Girl Scouts | \$ 3,000 | \$ 3,000 |
| Henry Center | \$ 14,000 | \$ 14,000 |
| Homeless Program | \$ 2,200 | \$ 3,000 |
| HOPE of East Tennessee | \$ 2,500 | \$ 2,500 |
| Literacy Council | \$ 2,500 | \$ 2,500 |
| Michael Dunn Center | \$ 49,000 | \$ 49,000 |
| National Kidney Foundation | \$ 4,100 | \$ 4,500 |
| Pathways Community Shelter | \$ 7,500 | \$ 8,000 |
| Ridgeview Psychiatric Hospital | \$ 5,000 | \$ 4,500 |
| Roane County Cooperative Ministries | \$ 2,500 | \$ 2,500 |
| Roane County Rescue Squad | \$ 38,500 | \$ 41,000 |
| Salvation Army | \$ 6,000 | \$ 6,500 |
| Senior Nutrition Program | \$ 15,000 | \$ 19,000 |
| Youth Athletic Association | \$ 18,500 | \$ 12,900 |
| YWCA | \$ 9,000 | \$ 10,000 |
| United Way Social Services | \$ 37,350 | \$ 51,190 |
| Total to Agencies/Programs | \$292,466 | \$308,261 |
| One-Time Grants– | | |
| Child Advocacy Center | \$ 1,000 | \$ 2,100 |
| Epilepsy Foundation | 650 | 650 |
| Roane Health Council | <u>2,500</u> | 2,500 |
| YWCA | | <u>4,750</u> |
| | \$296,616 | \$318,261 |
| Administrative - | 42,830 | 52,335 |
| Total Community Investment | \$339,446 | \$370,596 |

Note – 100% of the 2004 Allocation Amounts were paid to the agencies. 2005 Allocation amounts will depend on actual dollars received at year end.

Roane County United Way, Inc.

Statement of Activities

As of December 31, 2004**

Income

Revenue and Public Support -

| | |
|---------------------------------------|-----------------|
| Campaign applicable to current period | \$370,027 |
| Campaign applicable to prior period | 12,414 |
| Miscellaneous gifts and donations | 41,320 |
| Less – Amounts designation by donor | <u>(25,080)</u> |
| Total Public Support | \$398,681 |

Other Revenue –

| | |
|---------------------------------------|--------------|
| Interest & Dividend Income | \$2,626 |
| Unrealized Gain (Loss) on Investments | 587 |
| In-Kind Contributions | 2,100 |
| Miscellaneous | <u>2,261</u> |
| Total Other Revenue | \$ 7,574 |

Total Public Support and Other Revenue **\$406,255**

Allocations and Expenses

Program Services

| | |
|-------------------------|---------------|
| Agency Allocations | \$318,888 |
| Social Services Program | <u>37,079</u> |
| Total Program | \$355,967 |

Support Services

| | |
|------------------------|---------------|
| Fundraising | \$ 5,419 |
| Management and General | <u>50,753</u> |
| Total Support Services | \$ 56,172 |

Total Program and Support Services **\$412,139**

Change in Net Assets \$ (5,884)

NET ASSETS – Beginning of Year \$104,178

NET ASSETS – End of Year \$ 98,295

**Note: This report is submitted in DRAFT format pending release of final audit

2004/05 Roane County United Way

Campaign Recognitions

Community Contributors – Corporate gifts or employee campaigns that totaled \$250 - \$499

Farm Bureau Insurance-Kingston
Chattanooga Combined Federal Campaign

Community Builders – Corporate Gifts of \$500-\$999 and/or employee campaigns totaling \$500 - \$3599

AmSouth-Employees
Ashland Oil –Corporate/Employees
BellSouth-Corporate/Employees
BWXT Y12-Retirees
Citizens National Bank-Employees
Covenant Health - Employees
First Bank of Tennessee-Employees
Kroger-Employees
Lowes Home Improvement-Corporate/Employees
Mid-East Community Action Agency-Employees
Tennessee Employee Charitable Campaign
Regions Bank-Employees
Rohm and Haas Company - Employees
University of Tennessee - Employees
US Bank-Corporate
Wal-Mart-Corporate/Employees

Community Leaders – Corporate gifts of \$1000+ and/or employee campaigns \$3600 +

AmSouth Bank-Corporate
Bechtel Jacobs-Corporate/Employees
BWXT Y12-Corporate/Employees
Smoky Mountain Combined Federal Campaign
Duratek-Employees
Michael Dunn Center-Employees
Roane County Schools-Employees
Roane Medical Center-Employees
Wackenhut - Employees

Community Leaders (continued)

Roane State Community College-Employees
Rocky Top Markets-Corporate
Regions Bank-Corporate
UT Battelle-Corporate/Employees

Campaign Volunteers – The Roane County United Way would like to thank the following individuals who contributed to the success of this year’s campaign...

| | | |
|--|---|-----------|
| Campaign Chairman..... | Darryl Meadows | |
| Day of Caring Chair..... | Harriet Walker | |
| Pump Day Coordinators..... | Nathan Howard | Gail Lyke |
| | Teresa Kirkham | Brad Goss |
| Day of Caring Project Coordinators..... | d’Arcy Harder, <i>Oliver Springs HS</i> | |
| | Paul Goldberg, <i>RSCC</i> | |
| | Tony LaMance, <i>Duratek</i> | |
| | Bob Rehberg, <i>TVA</i> | |
| | Bob Capell | |
| Luncheon Hosts | Michael Dunn Center | |
| Campaign Thermometers | Dennis Letner, <i>Michael Dunn Ctr.</i> | |
| Loaned Executive | Cindy Dodson <i>Florence Crittenton Agency</i> | |

Campaign Meeting & Event Sponsors – We would like to recognize the following companies for contributing above and beyond their regular corporate gifts to help offset our campaign and event costs

Campaign Sponsors - Bechtel Jacobs
Citizens National Bank
First Bank of Tennessee
Roane Medical Center
United Community Bank
ORNL Federal Credit Union

Day of Caring - Hardees The Henry Center

Leadership Dinner - Sexton Automotive Group

Whitestone Country Inn
Laura's Liquor & Wine Store
Akins Crisp Public Strategies
Alexander Heating and Air
Yebo Wireless

The Roane County United Way is a not-for-profit organization exempt from income tax under section 501c(3) of the Internal Revenue Code and provides supporting services and other assistance to public and private agencies and community organizations to meet the human service needs of the general public of Roane County. RCUW is a local autonomous organization governed by a local board of directors and operates under a charitable solicitation permit issued by the State of Tennessee.

RCUW pays annual dues of 0.138 to United Ways of Tennessee and 1% to United Way of America. RCUW deducts 12% of the total amount pledged to RCUW supported programs to cover fundraising and year-round administration costs. RCUW does not charge fees for processing and distribution of pledges.



Roane County

United Way

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E-mail: rcuway@comcast.net

Diana Knobloch. . . Executive Director
Paulette Tucker. . . Social Services and
Administrative Assistant

Community. . .

Partnerships. . .

Results. . .

Matter.