



Roane County United Way 2005 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 community impact work. 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.....**

Janice Bardill

This was an exciting year as we moved into new office space generously provided for us by the Roane County Rescue Squad. This new space is enabling us to provide meeting space for many community groups and

agencies.

This space is enabling us to provide expanded services through our Volunteer Income Tax Assistance Program (VITA). United Way became the host site for Roane County's VITA program. Volunteers prepare simple tax returns at no charge with an emphasis on Earned Income Tax Credit. This year we will be partnering with community groups to expand this program to include financial literacy classes, cooking and efficient grocery shopping and financial counseling.

Your United Way Board continues to strengthen our relationship and education of the community through our quarterly newsletter and the annual Leadership Givers Appreciation Dinner. Watch as we continue to improve our website as well.

Roane County United Way is slowly but steadily making a transition from its traditional roots as a fund raising organization to becoming a community impact organization. This is bringing new challenges but will also bring rewards as we move along this path of transformation. There is no longer any 'down' time.

This past year we began the process of defining the strategies that would transform the Roane County United Way into an organization that will bring powerful and relevant solutions to our community's problems. To give an example, the difference is between providing quality shelter and food to the homeless people versus reducing the rate of homelessness. A Task Force was formed to review all pertinent information available to assist the Board in guiding this transformation.

The Roane County United Way board pledges to continue to work with our communities to identify the critical needs and coordinate the community services to meet these needs through efficient use of all funds and resources. As stated in the mission and vision statement,

To improve the lives of Roane County residents by mobilizing the caring power of its communities. We will build a stronger Roane County by mobilizing our communities to improve people's lives.

2005/06 Roane County United Way Board of Directors

Executive Committee and Officers

Janice Bardill, Chairman
CFO, Roane Medical Center

Greg Pugh, Treas.
Jefferson Federal Bank

Kathy Cole, 1st Vice Chair
Retired, Roane Medical Center

Carol Grametbauer, Sec'y
Retired, BWXT Y12.

Susan Alexander, 2nd Vice Chair
Human Resources Management
BWXT-12

Board Members

Edgar "Buddy" Bowers
Retired, Lockheed Martin

Rebecca Layne
Retired – Roane County Schools

Mike Emery
Director Business Management
Oak Ridge National Lab

Candace Lett
Roane County Schools

Paul Goldberg
VP of Continuing Education and
Workforce Development
Roane State Community College Retired - ORNL

Bill Mixon
Retired – ORNL

Tom Pickel

Missy Gallaher
Roane County Schools

Dirk Van Hoesen
Manager Environmental Mgmt
Oak Ridge National Lab

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

The Year in Review. . . . The Roane County United Way is active and engaged in the community all year long and 2005 was no exception. Through our Social Services program, we coordinate resources among agencies serving as a community link to individuals needing services.

This past year we were excited to partner with the IRS and become the Roane County Volunteer Income Tax Assistance site. Below are some highlights of our activities throughout the past year.

First Quarter -

Facilitated implementation of the Emergency Food & Shelter National Board Program for Roane County

Participated with the United Ways of Tennessee State Organization activities

Facilitated the Roane County Annual Meeting and Campaign Awards Luncheon

Planned and implemented our second Leadership Givers Reception and Dinner

Moved into new office facility

Planned and implemented Volunteer Income Tax Assistance program for Roane County (VITA)

Attended United Way of America CEO Summit

Celebrated and Hosted the Roane County Community of Promise Kick Off

Implemented and provided VITA Services

Second Quarter –

Met with DOE contractors to begin campaign planning

Held annual Roane County United Way Board planning retreat

Began coordination of Day of Caring community projects

Began work with Transitional Task Force – to begin to develop a transformation plan for RCUW.

Participated in Roane County 3-Star review

Participated in United Way Southeast Regional Conference

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

Attended Earned Income Tax Assistance Forum in Alexandria, VA

Facilitated Agency workshops

Facilitated Hurricane Katrina workshops in cooperation with Roane County EMA offices

Fourth Quarter –

Campaign Activities Continued – Day of Caring Projects

Allocation Review Process Begins

Hosted and facilitated Utility/Agency Workshop

Community. . .

Partnerships. . .

Results. . .

Matter.

**A Message from our 2005/06
Campaign Chairman.....**

Kathy Cole

This was a very eventful year for the Roane County United Way, as we celebrated our 50th anniversary. We also did another “first” in

our campaign which was to have a TEAM approach rather than one individual chairperson. A good acronym to remember for the word TEAM is: **T**ogether **E**veryone **A**chieves **M**ore. We set a very lofty goal of \$370,000, which we knew would require a record campaign.

Our team consisted of Bob & Barbara Capell, Mike Emery, Missy Gallaher, Johnny Griffin, Frank & Jo Ann Knies, Becky Layne, and Harriet Walker.. We set out by compiling a list of area businesses and assigning each team member to make contacts after our initial campaign letter went out. We also set up speakers for various civic groups and companies who wanted presentations for their employees. In addition, we arranged with Channel 12 TV to have two appearances during the campaign.

We also had an “Open House” at the United Way office and invited all agencies to set up booths to be available to answer questions as well as network with each other. We felt like these personal contacts and appearances helped us to get our message to the community that due to the recent events that had created extraordinary hardships on our community (reductions in TennCare and the increase in energy costs) as well as the extra asking for contributions to assist with our national disaster (Hurricane Katrina), we needed everyone who could to help us meet our goal to help our local agencies.

In celebration of our 50th anniversary, the TEAM asked that \$50 for 50 be considered—a year’s total of \$50 to our campaign in recognition of our 50 years of service, or increasing last year’s gift by at least \$50. Many first time givers heard our need and responded. We did another first also in holding a roadblock for the United Way. These efforts enabled us to reach nearly 95% of our goal or \$350,383!!

I want to personally thank everyone on the committee and all who gave their time or money to help in this year’s campaign. It’s about you, it’s about me, it’s about a community that cares and nowhere does a single gift go so far to make a difference as through the Roane County United Way.

What happens once I’ve given? – The Fund Distribution Process . . .

Traditionally, 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 \$370,000 goal, reaching approximately 95% 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 continually fund this program at the highest level.

The Committee also felt strongly about increasing funding to our emergency service agencies – Rescue Squad and Volunteer Fire Departments. Since these agencies cover the broadest range of the community populace they felt it was in the community's best interests to fund them to the extent that we can.

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. Efforts were taken to begin the process of streamlining these efforts and funds were directed accordingly.

While we were sad that Character Counts disbanded, this freed up a little revenue to enable us to add Imagination Library to our list of funded programs.

Continued. . .

A Transitional Task Force began 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 2-3 years to meet the guidelines set forth by United Way of America as well as better meet community needs.

This group was made up of 3 Board members, members of our

allocation and campaign partners as well as potential stakeholders that could be affected by transition. The group met diligently over several months and in August presented a Phase I plan with recommendations for further work. Transitional work will continue this spring..

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.

2005/06 Allocation Volunteer Panels

Strengthening and Supporting Families & Seniors –

Candace Lett (Chair), Jim Lett, Ted Taylor, Nancy Newcomb, Laura Overstreet, and Karlene Briley

Health and Rehabilitation Services –

Bill Mixon (Chair), Jill McMasters, Ken Beauchamp, Daniel Peterson, Rick Ross and Linda Hellmann

Helping Kids Succeed –

Greg Pugh (Chair), Josh Igou, Jodi Fraley, and Rhonda Kodman

Promoting Self-Sufficiency –

Tom Pickel (Chair), Bob Henderson, Fred Taylor, JoBelle Masters, Lynne Spires, and Mary Will

Crisis Intervention –

Mike Emery (Chair), Teresa Ferguson, Greg Palko, John Sublett, Dirk Van Hoesen, and Donna Isham

Protecting Community Well-Being –

Buddy Bowers (Chair), Benny Headrick, Nathan Howard, Don Davis, Bobby Davis, Tim Carroll, and Lonnie Wright

Roane County United Way Community Investments

	2005	2006
4H Volunteers	\$ 5,700	\$ 4,845
East Roane County VFD	\$ 6,500	\$ 7,650
South Roane County VFD	\$ 6,500	\$ 7,650
West Roane County VFD	\$ 4,000	\$ 5,000
Boy Scouts	\$ 10,000	\$ 8,500

Total Public Support	\$353,552	398,681
Other Revenue –		
Interest & Dividend Income	\$ 1,466	2,626
Unrealized Gain (Loss) on Investments	130	587
In-Kind Contributions	1,625	2,100
Miscellaneous	<u>0</u>	<u>2,261</u>
Total Other Revenue	\$ 3,221	7,574
Total Public Support & Other Revenue	\$356,773	\$406,255

Allocations and Expenses

Program Services		
Agency Allocations	\$255,921	318,888
Social Services Program	<u>28,582</u>	<u>37,079</u>
Total Program	\$284,503	355,967
Support Services		
Fundraising	\$ 2,151	5,419
Management and General	47,957	50,753
United Way of America	<u>3,065</u>	
Total Support Services	\$ 53,170	56,172
Total Program & Support Services	\$337,673	\$412,139
Change in Net Assets	\$ 19,100	\$ (5,884)
NET ASSETS – Beginning of Year	\$ 98,294	\$104,178
NET ASSETS – End of Year	<u>\$117,394</u>	<u>\$ 98,294</u>

2005/06 Roane County United Way Campaign Recognitions

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

Amerivox Communications
Ashland, Inc.
Blue Springs Marina
Canberra Industries
Denso Manufacturing

PHP/Cariten
Ridgeview Psychiatric Hospital
Roane County Farm Bureau-Kingston
Roane Veterinary Hospital
Rohm & Haas Chemicals

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

- | | |
|--|-------------------------------------|
| <i>ABS Consulting</i> | <i>OMI, Inc.</i> |
| <i>AmSouth Bank</i> | <i>ORNL Employees Credit Union</i> |
| <i>BellSouth</i> | <i>Pro 2 Serve</i> |
| <i>Citizens National Bank</i> | <i>Richards Industries</i> |
| <i>Covenant Health</i> | <i>Roane County Employees</i> |
| <i>First Bank of Tennessee</i> | <i>Shaw Environmental</i> |
| <i>K-25 Employees Credit Union</i> | <i>State of Tennessee Employees</i> |
| <i>Michael Dunn Center</i> | <i>UT Campus Chest</i> |
| <i>Mid-East Community Action Agency</i> | <i>Wal-Mart</i> |
| <i>Oak Ridge Associated Universities</i> | <i>WESKEM</i> |
| <i>The Employees of the</i> | |
| <i>Chattanooga Combined Federal Campaign</i> | |

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

- | | |
|---|--------------------------------------|
| <i>AmSouth Bank</i> | <i>Roane Medical Center</i> |
| <i>Bechtel Jacobs</i> | <i>Roane State Community College</i> |
| <i>BWXT Y-12</i> | <i>Rocky Top Markets</i> |
| <i>Duratek</i> | <i>US Bank Corp.</i> |
| <i>Kroger</i> | <i>UT Battelle</i> |
| <i>Regions Bank</i> | <i>Wackenhut</i> |
| <i>Roane County Schools</i> | |
| <i>The Employees of the</i> | |
| <i>Smoky Mountain Combined Federal Campaign</i> | |

Volunteers – United Way relies heavily on volunteers to accomplish their mission. Volunteers help to keep our administration costs low. They are the backbone of the work that we do.

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

CAMPAIGN

Campaign Team Members – Kathy Cole (Chair), Bob & Barbara Capell, Frank & Jo Ann Knies, Johnny Griffin, Missy Gallaher, Mike

Emery, Becky Layne, Harriet Walker

Day of Caring Chair..... Harriet Walker

Day of Caring Projects and Teams...

St. Mary's Baptist Church Youth – Sang to patients at Harriman Care and Rehab Center

Oliver Springs High School Beta Club – Clean up project at the Oliver Springs Historical Train Depot Library

Knights of Columbus – Constructed changing rooms for the Seton's Thrift store

Roane State Faculty – Did a landscaping project at Michael Dunn Center AND read to Head-Start students

Kingston Rotary Club/Keep Roane Beautiful – Beautification project at the Kingston Public Library

TVA – Assisted Pathways in their move to Rockwood.

Roane County Cooperative Ministries Volunteers – RCCM office renovation project

Campaign Thermometers... Dennis Letner, *Michael Dunn Ctr.*

Pump Day Coordinators..... Jo Ann and Frank Knies (Chairs)
Karin Cisson – Harriman Tony Mason - Harriman
Gail Lyke – Rockwood Shirley Freeman - Kingston

2005 Volunteer Income Tax Assistance Program –

Dana Peterka – Site Coordinator
Dorothy Skinner
Paulette Lawson

2005 Annual Meeting Luncheon Hosts... Michael Dunn Center

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 Company	ORNL Employees Credit Union
Citizens National Bank	Regions Bank
First Bank of Tennessee	Roane Medical Center
K-25 Employees Credit Union	Y-12 Employees Credit Union

Leadership Dinner Sponsors-

Sexton Automotive Group	Fowler's Furniture
Whitestone Country Inn	Laura's Liquor & Wine Store
Akins Crisp Public Strategies	Kingston Rotary Club
Duratek	

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

Diana Knobloch. . . Executive Director
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