



**Roane County  
United Way**

**Annual Report  
2006**

***Caring Is Sharing***



# 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 of Roane County. 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...**

**Kathy Cole**

The year 2006 marked the 51<sup>st</sup> year of United Way in Roane County. As we celebrate our successes at the annual meeting, it gives us a chance

to reiterate our challenges to meet the needs that will help us be even more effective.

We are continuing to transform our organization to bring powerful and relevant solutions to our community's problems as we transition from simply fund raising and distribution to agencies that serve people's needs to being more proactive to prevent needs. The Task Force that was formed last year identified major needs of our communities, and the job of identifying and working toward the solutions is overwhelming if we look at the entire list and attempt to work on all of it. This year we have identified the increasing high school drop out rate as a major community impact issue. We have looked at ways we might partner with others to curtail this. We secured a grant of \$60,000, renewable for three years, through the United Ways of Tennessee to start five pre-K classrooms in the Roane County School System. We also obtained a Pettway Grant for \$5,000 that allowed us to provide emergency funds for women in need (particularly dental & auto repair assistance).

To fulfill a United Ways of America membership requirement that a volunteer led self assessment be done every three years, all board members completed an online self assessment. This was to gauge Roane County United Way's current status relative to the United Way of America's 34 Standards of Excellence. The results will help us pinpoint areas for improvement, additions or change. Our goal is to build a strategic plan for next year addressing the three or four where we scored lowest.

At the United Way office we have continued to be the host site for Roane County's VITA (Volunteer Income Tax Assistance) program and processed 54 returns. Partnering with other organizations, the Project Freedom program has included financial literacy classes, cooking and efficient grocery shopping and financial counseling classes.

Our quarterly newsletter and the annual Leadership Givers Appreciation Dinner, as well as our Executive Director volunteering to serve on the Roane County Chamber's Housing and Economic Development Committees, continue to strengthen our relationship and education of the community. We would like to thank and acknowledge the generosity of Kathy and Dan McDowell, Light Weaver Group, who have done our website development.

I feel one of the biggest challenges is to get the word out to all employers of working and retired citizens of Roane County of how United Way works, and how each can help. Anyone in our community who knows of or sees individuals in need would gladly help but may feel their help would be so trivial it wouldn't matter, or they can't because of time constraints or inability to check the validity of needs. These are things United Way of Roane County does every day, effectively, efficiently with

track able accountability of all funds given through them. No gift is too small and workplace giving is the easiest and most consistent way to continue services. *If we all lift together, there is no load.* Help us spread the word what Roane County United Way is: *People caring and sharing to improve lives in our community.*

**ROANE COUNTY UNITED WAY  
2006/07 BOARD OF DIRECTORS**

Darrell Akins  
*Akins Crisp Public Strategies*

Becky Layne

Janice Bardill  
*CFO, Roane Medical Center*

Bill Mixon

Mary Ann Owings

Kathy Cole, Chairman

Greg Palko  
*Oak Ridge National Lab*

Mike Emery  
*Oak Ridge National Lab*

Tom Pickel, Vice Chair

Missy Gallaher  
*Roane County Schools*

Greg Pugh, Treasurer  
*First National Bank of TN*

Paul Goldberg  
*Roane State Community College*

Dirk Van Hoesen  
*Oak Ridge National Lab*

Carol Grametbauer, Secretary

Incoming Officers for 2007/08

Board Chair  
First Vice Chair  
Second Vice Chair  
Secretary  
Treasurer

Tom Pickel  
Darrell Akins  
Paul Goldberg  
Carol Grametbauer  
Ken Beauchamp

**A Message from our  
2006/07 Campaign Chair. . .**

**Tom Pickel**

Our campaign this year was fortunate to have an excellent leadership team, corporate sponsors, good cooperation from our Agency partners, and many volunteers. The campaign team consisted of Tom Pickel, Bob and Barbara Capell, Kathy Cole, Carol Grametbauer, Johnny Griffin, Rebecca Layne, Jim Leitnaker, Mary Ann Owings, Kathy Parks, David

Reichle, and Harriet Walker. Based on the resources available and the projected needs of the agencies, the team set a challenging goal of \$360,000. "Caring is Sharing – The United Way" was adopted as the slogan for the campaign.

A kickoff breakfast and "Day of Caring" was held on September 13, 2006. The "Day of Caring" concept originated after the disaster of 9/11/01 as a way of remembering the losses and heroic sacrifices of that day. Tee shirts were provided for "Day of Caring" workers. Students at the Trenton Street Baptist Day Care Center competed in an art contest to select the art work used to illustrate our slogan on the tee shirts. The winners (a tie) were 8 year old Madeline Collins and 7 year old Caroline McDonald. A highlight of the kickoff breakfast was the presentation to the young ladies of \$25 US-EE Bonds and gift certificates provided by ORNL Federal Credit Union.

This year's "Day of Caring" projects were conducted to help several agencies. Organizations completing projects were Energy Solutions (Duratek), Harriman Rotary Club/So. Roane VFD/Roane State Students, Kingston Rotary Club, Knights of Columbus, Oliver Springs High School Beta Club, TVA and United Way Board.

An "Open House" was held at the United Way Office on October 10, 2006, to provide an opportunity for the public to learn about the help available in the area and the opportunities for volunteer service. Many of our Agency partners provided displays of their services and had representatives available to answer questions about their activities. Refreshments were furnished by Kroger's.

The annual "Pump Day" event was held on November 9, 2006, thanks to Rocky Top Markets. Becky Layne coordinated this activity with the assistance of Gail Lyke, Karin Cisson, Debbie Harper, and Shirley Freeman. Our thanks to many volunteer "pumpers".

This year we made a special effort to expand our list of contributors. Efforts were made to establish relationships with businesses and industries in the County that have not been contributing to United Way. Both corporate gifts and employee payroll deduction plans are needed. For the first time, a direct mass mailing was made to residents of the County. This effort to expand our base of contributors is important because of the many new residents and industries in the area. The results of our efforts were gifts and pledges of approximately \$328,000, or 91% of our goal.

I want to thank the members of a hard working campaign team, our corporate sponsors, the many volunteers who assisted in our activities, our agency partners and their representatives, and especially our corporate and individual contributors. Your efforts and gifts help many

people in the County during times of need and in difficult situations. You give meaning to our slogan, "Caring is Sharing – The United Way.

## **2006/07 CAMPAIGN TEAM AND VOLUNTEERS**

**Campaign Team Members** – Tom Pickel (Chair), Kathy Cole, Bob & Barbara Capell, Johnny Griffin, Becky Layne, Harriet Walker, Dave Reichle, Mary Ann Owings

**Day of Caring Chair**..... Kathy Cole and Harriet Walker

### **Day of Caring Projects and Teams...**

- ★ **Harriman Rotary Club & Roane State** – Jeff Jenkins, Team Leader  
Completed a demolition project at The Michael Dunn Center
- ★ **Kingston Rotary Club** – Jim Leitnaker, Team Leader  
Planted spring bulbs at Highway 58 Park in Kingston
- ★ **Kingston Rotary Club** – Tom Pickel, Team Leader  
Completed a storage closet at United Way offices
- ★ **Oliver Springs HS Beta Club** – Cindy Conrad, Team Leader  
Flagpole beautification project at OSHS
- ★ **Knights of Columbus** – Bob Capell, Team Leader  
Installation of storage cabinets at The Henry Center
- ★ **TVA** – Bob Rehberg, Team Leader  
Painting projects at The Henry Center and Louise Singleton Center

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

**Pump Day Coordinators**..... Becky Layne (Chair)  
Harriman - Karin Cisson and Debbie Harper  
Rockwood -Gail Lyke  
Kingston – Shirley Freeman

## **2006/07 Roane County United Way Campaign Recognitions**

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

AmSouth Bank Employees  
AT & T Employees  
Barge Waggoner Sumner and Cannon Employees

Chattanooga Combined Federal Campaign  
Farm Bureau Insurance – Charlie Daniels Agency  
Griffin Insurance Agency Employees  
Ridgeview Psychiatric Hospital Employees  
Roane Veterinary Hospital – Dr. Don Davis  
Wal-Mart – Employees and Corporate  
Wellpoint Foundation Employees

**Community Builders** – Corporate Gifts of \$500-\$1000 and/or employee campaigns totaling \$500 - \$3599

Employee Campaigns

Bell South  
BWXT Y12 Retirees

Pro2Serve  
Regions Bank

Citizens National Bank  
First Bank of Tennessee  
Jacobs Engineering  
K-25 Federal Credit Union  
Michael Dunn Center  
Mid-East Community Action Agency  
Oak Ridge Associated Universities  
OMI, Inc.  
ORNL Federal Credit Union

Richards Industries  
Roane Alliance  
Roane County Employees  
Roane State  
US Bank  
WESKEM

Corporate Gifts

BellSouth  
First Bank of Tennessee  
Rocky Top Markets  
US Bank

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

Employee Campaigns

Bechtel Jacobs LLC  
BWXT Y12  
Kroger  
Roane County Schools  
Roane Medical Center  
Smoky Mountain Combined

Corporate Gifts

AmSouth Bank  
Bechtel Jacobs LLC  
BWXT Y12  
EnergySolutions  
UT Battelle  
Wackenhut Services

Federal Campaign  
UT Battelle

**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 – These companies have donated above and beyond their regular campaign to help offset our campaign costs

BWXT Y12  
Roane Medical Center  
Citizens National Bank  
Bechtel Jacobs LLC

United Community Bank  
ORNL Federal Credit Union  
K-25 Federal Credit Union

Leadership Dinner Sponsors-

Sexton Automotive Group  
Whitestone Country Inn  
Akins Crisp Public Strategies  
Rarity Communities

Energysolutions  
Laura's Liquor & Wine Store  
Kingston Rotary Club



*Oliver Springs High School Beta Club completes a landscaping project around the Oliver Springs High School flagpole.*

## 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 \$360,000 goal, reaching approximately 91% 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.

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.

## **2006/07 Allocation Volunteer Panels**

**Strengthening and Supporting Families & Seniors** – Nancy Newcomb (chair), Jim Lett, Ted Taybr, Laura Overstreet, and Karlene Briley

**Health and Rehabilitation Services** – Bill Mixon (Chair), Jill McMasters, Ken Beauchamp, Rick Ross, Katy Dahlhauser and Linda Hellmann

**Helping Kids Succeed** – Greg Palko (Chair), Rhonda Kodman, Greg Pugh, and Cindy Conrad

**Promoting Self-Sufficiency** – Janice Bardill (Chair), Bob Henderson, Fred Taylor, Lynne Spires, Alma Johnson, and Ken Yager

**Crisis Intervention** – Mike Emery (Chair), Teresa Ferguson, John Sublett, Dirk Van Hoesen, and Donna Isham

**Protecting Community Well-Being** – Paul Goldberg (chair), Bobby Davis, Angela Keathley, Harriet Walker, Barbara Capell, Mike Laman, and Buddy Bowers

### Roane County United Way Community Investments

	2006	2007
4H Volunteers	\$ 4,845	\$ 5,700
East Roane County VFD	\$ 7,650	\$ 7,650
South Roane County VFD	\$ 7,650	\$ 7,650
West Roane County VFD	\$ 5,000	\$ 5,000
Boy Scouts	\$ 8,500	\$ 9,000
CASA of the Tennessee Heartland	\$ 5,500	\$ 5,500
Child & Family Tennessee	\$ 2,700	\$ 2,700
Child Advocacy Center	\$ 3,000	\$ 4,500
Children's Fund	\$ 3,000	\$ 2,296
Council on Aging	\$ 4,000	\$ 4,000
Eagles of the MDC	\$ 500	pd thru MDC
Epilepsy Foundation of East TN	\$ 300	\$ 500
FISH of Roane County	\$ 2,000	\$ 1,500
Florence Crittenton Agency	\$ 2,450	\$ 2,504
STARS – Florence Crittenton	\$ 6,750	\$ 6,952
Girl Scouts	\$ 2,550	\$ 4,000
Henry Center	\$ 13,000	pd thru MDC
Homeless Program	\$ 3,500	\$ 3,000
 2007 Community Investments	 2006	 2007
HOPE of East Tennessee	\$ 1,950	\$ 1,800
Imagination Library	\$ 1,000	\$ 1,000
Literacy Council	\$ 2,120	\$ 2,120
Michael Dunn Center	\$ 43,150	\$ 57,650
National Kidney Foundation	\$ 2,894	\$ 2,800
Pathways Community Shelter	\$ 8,300	\$ 8,715
Ridgeview Psychiatric Hospital	\$ 6,500	\$ 5,500



*Employees from BWXT- Y12 tour The Michael Dunn Center*

**Roane County United Way, Inc.  
Statement of Activities and Change in Net Assets  
As of December 31, 2006 and 2005**

**Income**

	<b>2006</b>	<b>2005</b>
<b>Revenue and Public Support -</b>		
Campaign applicable to current period	\$268,496	286,333
Campaign applicable to prior period	84,292	36,598
Miscellaneous gifts and donations	93,135	40,093
Less – Amounts designation by donor	(2,377)	(9,472)
Less – Uncollected pledges	<u>(1,820)</u>	<u>-0-</u>
<b>Total Public Support</b>	<b>\$441,726</b>	<b>353,552</b>

**Other Revenue –**

Interest & Dividend Income	\$ 1,722	1,466
Unrealized Gain (Loss) on Investments	1,613	130
In-Kind Contributions	2,000	1,625
Miscellaneous	<u>8,758</u>	<u>-0-</u>
<b>Total Other Revenue</b>	<b>\$ 14,093</b>	<b>3,221</b>

**Total Public Support & Other Revenue    \$455,819    \$356,773**

**Allocations and Expenses**

**Program Services**

Agency Allocations	\$341,807	255,921
Social Services Program	<u>34,551</u>	<u>28,582</u>
<b>Total Program</b>	<b>\$376,358</b>	<b>284,503</b>

**Support Services**

Campaign	\$ 27,226	2,151
Management and General	21,133	47,957
United Way of America	<u>3,226</u>	<u>3,065</u>
<b>Total Support Services</b>	<b>\$ 51,585</b>	<b>53,170</b>

**Total Program & Support Services    \$427,943    337,673**

Change in Net Assets	\$ 27,876	19,100
NET ASSETS – Beginning of Year	\$117,394	98,294
NET ASSETS – End of Year	<u>\$145,270</u>	<u>\$117,394</u>



The program consists of several components. These various components are designed to be selected and tailored to the individual situations of the clients. Some of the

components, such as promoting financial self-sufficiency books at local libraries, are offered in a cost effective manner to attract clients. Those clients, who cannot afford the cost, if any, of a program, will be asked to do volunteer work to “pay” for the program. A commitment of time or money demonstrates a willingness to work to achieve financial self-sufficiency.

**Program Implementation Comments**

Roane County United Way’s approach to the Project Freedom programs is to identify organizations, such as churches and community oriented organizations that will take over the ownership of the various programs. They collaborate with United Way and manage staff, continuously improve, and fund the minor, miscellaneous expenses of the program.

Two comments on the costs of the program. First, the extensive use of volunteers to conduct the various program components keeps costs down. Second, the use of the already established facilities of United Way and other Roane County organizations provides a minimal overhead environment for this program

**2006 Volunteer Income Tax Assistance Program**

- |                                 |                  |
|---------------------------------|------------------|
| Dana Peterka – Site Coordinator | Tony Malinauskas |
| Paulette Lawson                 | Joe Castle       |
| Joan Higgins                    | Phyllis Jackson  |
| Grant Palmer                    |                  |

**Program Collaborators –**

- |                                 |                               |
|---------------------------------|-------------------------------|
| Volunteer Income Tax Assistance | Internal Revenue Service      |
| Financial Peace University      | Kingston Church of Christ     |
| Cooking and Shopping Classes    | UT Extension Office           |
| Self Improvement Books Program  | Rockwood & Kingston Libraries |

**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 all the individuals who contributed to the success of this year’s activities from campaign, to fund distribution, to our volunteer tax preparation program. None of these activities would be possible without their contribution.



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 11% 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.

**Contact Us:**

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