

# 2005 Annual Report



## Our Mission

*Helping people, changing lives, making every contribution count.*



We are proud to announce that the 2004 - 2005 campaign is officially closed, properly audited and has successfully turned around a three-year downward trend. Our audited financials show United Way realized a campaign total of \$16.1 million and other revenue for a total of \$16,908,517. Early indications are clear that 2005 - 2006 will continue this upward swing.

In the same breath, it's equally exciting to announce that our efforts during 2005 managed to lower our overhead to a very respectable 17.89 percent. In other words, people in need in our four counties will have the chance to see more money used more efficiently to improve their lives.

The cause for this upswing can be partly attributed to an improvement in Oregon and Washington's economies. But for those of us who've been active working closely with the hundreds of companies and organizations and individuals that make up our donor base, we know it's something more. We've seen it in our discussions with CEOs and Executive Directors, we've heard it from people in the workplace, and we read it every day with the notes in the mail of those sending in checks. People in our region are concerned about each other—and they want to help.

Since its beginning, United Way has always served as the trusted means of ensuring that neighbors' donations reached the neighbors in need. And we're hearing and seeing the effect of a return to that trust and understanding about what we do best—we bring together the right people, ideas and resources to get the whole community involved in improving lives.

I am proud to report none of this could have happened – none of this would be possible, without the selfless dedication and energy of an army of volunteers. The 2004 - 2005 Cabinet was under the able leadership of Sho Dozono, a tireless and respected community activist who was honored by the Association of Fundraiser Professionals and Oregon Business magazine as the Volunteer Philanthropist of 2005. Sho, his cabinet, and our staff drove this campaign to its success, and to them go the congratulations for a job well done.

On behalf of the many children, adults and seniors in need throughout Multnomah, Clackamas, Clark and Washington counties whose lives will be touched by these efforts, I want to extend my personal thanks to each and every one of you.

Respectfully,

Brent Stewart  
President / CEO

# 2005

## Financial Information

July 1, 2004 - June 30, 2005

### Public Support and Revenue

|   |                   |
|---|-------------------|
| Pledge income - including amounts raised for others | 15,719,951        |
| Grants and bequests                                 | 163,400           |
| Donated services                                    | 52,597            |
| <b>Subtotal</b>                                     | <b>15,935,948</b> |
| Provisions for uncollectible pledges                | <650,000>         |
| Less amounts designated to others                   | <5,163,522>       |

### Revenue

|                                 |         |
|---------------------------------|---------|
| Community service fees          | 140,756 |
| Net revenue from special events | 102,921 |
| Rental income                   | 149,091 |
| Prior campaign pledge recovery  | 394,607 |
| Other                           | 185,194 |

**Total revenue** **972,569**

**Total public support and revenue** **11,094,995**

### Expenses

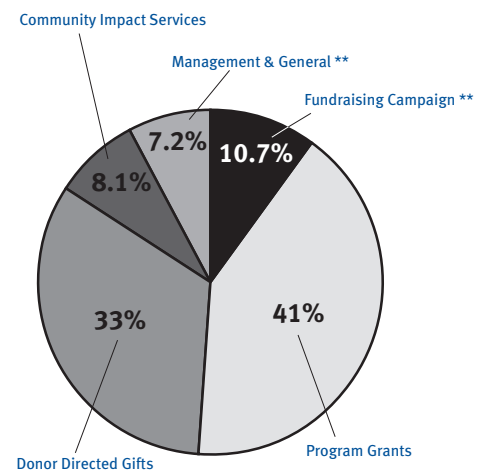
|  |           |
|--|-----------|
| Allocations and payments to affiliates | 6,280,138 |
| Community impact program services      | 1,228,208 |

### Supporting services

|                        |           |
|------------------------|-----------|
| Fundraising campaign   | 1,616,120 |
| Management and general | 1,165,362 |

**Total allocations and expenses** **10,289,828**

|                                   |           |
|-----------------------------------|-----------|
| Increase <decrease> in net assets | 805,167   |
| Net assets, beginning of year     | 3,473,887 |
| Net assets, end of year           | 4,279,054 |



## Expenditures

**\*\* United Way Overhead**  
 Management & General - 7.2%  
 Fundraising Campaign - 10.7%

## Board of Directors

**Martin D. Moll**, chair - Aldrich, Kilbride & Tatone, LLC

**Sho Dozono**, vice chair - Azumano Travel

**Tina L. Foster**, treasurer - U.S. Bank – Oregon and SW Washington Metropolitan Region

**Dan James**, secretary - Ball Janik, LLP

**Jay Bloom** - Morrison Child and Family Services

**Kevin Borkowski** - KPMG

**Julie E. Branford** - Community Leader

**Marie Dahlstrom** - OHSU Cancer Institute

**Bertha M. Ferran** - Windermere Mortgage Services

**James Francesconi** - Haglund, Kelley, Horngren, Jones & Wilder, LLC

**Jacquelyn Gaines** - Providence Milwaukie Hospital

**Raymond G. Guenther** - Community Leader

**Andrew Haller** - Pacificcorp

**Anthony R. Harris** - Unbounded Grace

**Roger Hinshaw** - Bank of America

**Greg S. Cantor** - NW Natural

**Joe Kortum** - Southwest Washington Medical Center

**Bernie Kronberger** - Wells Fargo Bank

**Ross Lienhart** - PCC Structuals

**David B. Lippoff** - Community Leader

**Liu Kai Ming** - UPS

**Timothy L. McMahan** - Stoel Rives LLP

**Mary Monnat** - LifeWise Northwest

**Alberto Moreno** - Department of Human Services – State of Oregon

**Kevin Neary** - Enterprise Rent-A-Car

**Judy L. O'Connor** - Northwest Oregon Labor Council, AFL-CIO

**Preston Pulliams** - Portland Community College

**Ray Solnik** - NewEdge Networks

**Richard Taylor** - Intel Oregon

**Barbe West** - Community Choices 2010

**Michael C. Worthy** - Bank of Clark County

## Chief Administrative Personnel

**Brent A. Stewart, Sr.** - President / CEO

**Carol Frye** - COO

## United Way Contact Information

**United Way of the Columbia-Willamette**

619 Southwest 11th Avenue, #300

Portland, Oregon 97205

503.228.9131 | *portland*

360.696.0341 | *vancouver*

**Hours of Operation**  
Monday - Friday | 8:30 am - 5:00 pm