United Way of the Columbia-Willamette

2011 REPORT TO THE COMMUNITY
Fiscal Year June 2010-July 2011
OUR MISSION:
Helping people, changing lives, making every contribution count.

We are advancing the common good by mobilizing the caring power of communities across the four-county Portland/Vancouver metro area in both human and financial resources. By working together, united, we can inspire hope and create long-lasting changes in the lives we touch and our community.

OUR VISION:
To build a community where...

- People are committed to the wellbeing of children
- Families are nurtured and supported
- Neighborhoods are safe
- Individuals are prepared to succeed in a complex, changing world
- A strong, diverse economy creates good jobs
- All people see the possibilities for themselves and others
- All people are healthy and living as independently as possible
- Diversity is embraced
- People live and work together, encouraging and supporting one another

LIVE UNITED is a constant reminder that when we as individuals think outside ourselves, we have the power to create change. We all win when a child succeeds in school, when families are financially stable, and when people are healthy. With your help, United Way has been working to advance the common good in Multnomah, Washington, Clackamas and Clark Counties for more than 92 years. Much has changed in our community over the years but one thing has remained constant – our mission of helping people, changing lives and making every contribution count.

Your United Way has been able to accomplish this mission by focusing on the building blocks we all need to succeed: education, income and health. In the past year, we have worked with well over 1,000 companies from all sectors, 30,000 individual donors, various foundation partners, business and community leaders, and almost 10,500 volunteers. With your help, we funded 31 projects and strategic initiatives last year in collaboration with 150 service providers. Together we created lasting changes in the lives of over 100,000 people and strengthened communities across our region.

A very special thank you to our loyal contributors, volunteers, and corporate and community leaders for your continued support.
United Way is founded on a simple principle: by acting together we can make positive change in the community that we could never achieve acting alone. We do this through an investment strategy called Community Impact. Our goal is to help people with their needs today while also creating deep and lasting changes by addressing the three underlying elements that are the foundation of successful lives and a successful community: education, income and health.

It starts with a thorough assessment of community needs and analysis of best practices. We then use a volunteer-driven competitive grant process to identify the most effective projects and programs. United Way strategically invests in collaborations of non-profits, business and community leaders who are committed to measurable results. By pooling your contributions with those of your neighbors through the Community Impact Fund, you not only have the power to change lives in an immediate and lasting way – you have the power to change the future of the community we share.

With your help in fiscal year 2010-11, United Way funded more than 31 projects in the four-county Portland/Vancouver metro area and worked with over 150 partner agencies. As supporters of United Way, you can be proud that last year 100,000 children, individuals, and families received help. As a community, we all win when kids are successful in school, when families are financially stable, and when people have good health. United Way is committed to ensuring that everything we do is focused on results, accountability and the greatest impact where the need is greatest.
To accomplish our Community Impact goals requires support from companies, individuals and foundations throughout the Portland/Vancouver metropolitan area. This year campaign co-chairs Bob Van Brocklin, Managing Partner and CEO of Stoel Rives, LLP and Gregg Kantor, President and CEO of NW Natural agreed to lead the 2010-2011 campaign despite the slow economic recovery in the region. The good news is that people and companies answered the question of whether they would be there for those in need with a resounding yes. Together, with the help of almost 30,000 donors, a thousand businesses and organizations, and over 2,000 volunteers we raised $21.1 million for our community. This represented a 5.1% increase over the prior year and was the second largest campaign total in the 91-year history of this United Way.

Results also included contributions from the Pacific Northwest Combined Federal Campaign (CFC) which totaled $1,737,156 million, a 3% increase over last year. About 5,200 employees from 600 federal offices in 37 counties in Oregon and SW Washington participated this year. United Way of the Columbia-Willamette supports all phases of the CFC campaign including volunteer training, distributing campaign materials and processing of donations.

A number of companies went above and beyond and were recognized with awards. UPS earned United Way’s Achievement Award both locally and nationally. Since 1982, UPS, its foundation, employees and retirees have donated $1 billion to United Way programs across the country. Locally UPS has run annual workplace giving campaigns through United Way since 1986 and in the last fifteen years has raised an impressive $6.3 million.

Intel Corporation received the prestigious Corporate Leadership Award for their outstanding support of the community and United Way. A very special thank you to Intel employees, retirees, and the Intel Foundation who together raised $6.8 million to support our community.

Campaign Chair Awards went to Bi-Mart and Nordstrom, Best New Company Campaign to Woodruff-Sawyer Oregon, Inc., and the Innovation Award to Pendleton Woolen Mills. Phil Moran and Shari Young with Stoel Rives, Jan Lambert with PacifiCorp, and Laura Bain with Intel were recognized as Campaign Coordinators of the Year.

This year Meyer Memorial Trust donated an additional $300,000 to the Community Relief Fund and provided a challenge to the community that helped generate even more funding for this critical work. With this gift, we have raised over two million dollars since 2009 and helped about 20,000 households representing close to 60,000 people.

Thank you to all the individual donors, companies and organizations, federal workers, and foundations for your generosity, spirit of caring, and ongoing support.
OTHER HIGHLIGHTS FROM THIS YEAR:

VOLUNTEERISM

- 10,288 Volunteers were connected to service opportunities resulting in 69,815 hours given at a value of $1.4 million.
- 82,739 Calls handled by 211info

This past year United Way also collaborated with Oregon Mentors to launch a statewide effort in partnership with United Ways around the state to recruit 7,000 new mentors in the next three years.

The fourth annual MLK Weekend of Service drew 2,000 volunteers from across the four-counties who worked on 96 different projects with 70 nonprofit partners. United Way’s strategic partner in volunteerism, Hands On Greater Portland was integral in helping organize this highly successful event. Volunteers spent a total of 8,000 hours or the equivalent of almost $166,800 worth of work for the community and helped serve meals, clean up local parks, make blankets for shelters, salvage building materials, and refurbish bikes for kids. Thank you to all of the volunteers who participated.

Bringing Tax Dollars to our Community

Aiming to put savings and tax refunds in taxpayers’ pockets, United Way funded free tax preparation programs for people across the region that may be eligible for tax refunds through the Earned Income Tax Credit (EITC). The program sponsored by Bank of America Charitable Foundation and the Walmart Foundation brings thousands of dollars back to our local community. “Building the financial security of our local families is critical to revitalizing our economy,” said Roger Hinshaw, Oregon and Southwest Washington president, Bank of America. “Free tax preparation sites provide an opportunity to help put money back in the pockets of hard-working families. Our longstanding financial stability partnership with United Way is one great example of how the bank is helping support pathways out of poverty.” Over 600 volunteers helped families and individuals with free tax preparation.

Going Green

This year we implemented a series of projects to make us a more “green” organization. This was done to help protect our environment but also to ensure we improve our efficiency and decrease costs. In the past year, we reduced the use of natural gas, saving our organization $40,000 since updating the system. Our Information Technology department upgraded staff computers to new Energy Star rated units and we have switched to green-certified cleaning products. With the help of the Best Business Center, United Way also participated in a waste audit to set waste reduction goals and expand the current recycling programs. About 23 pounds of plastic bags and 58 pounds of rigid plastics have been diverted from garbage to recycling. In the first year, upgrades to the building’s heating and air conditioning system lead to a reduction in electricity usage of 50% and natural gas usage was also reduced by 28% in one building.

Far West Fibers Classic

The 16th annual Far West Fibers Classic drew 225 golfers to Pumpkin Ridge Golf Club’s Ghost Creek Course to show their support for United Way. A special thank you to the 22 companies who sponsored the event and helped raise thousands to help our community. The event attracted local golfers who were also joined by many from around the nation to raise money for the Community Impact Fund that focuses on education, income and health programs in the four-county region.

Community Issues Forum

André Tapia, Chief Diversity Officer and Emerging Workforce Solutions Leader at Hewitt Associates and internationally recognized author of The Inclusion Paradox: The Obama Era and the Transformation of Global Diversity, was the keynote presenter at breakfast attended by close to 900 business and community leaders. His direct and compelling approach provided a non-traditional way of looking at differences of race, age, gender, sexual preferences, ethnicity, and disabilities. Following the event, Mr. Tapia led a half-day forum with close to 100 local leaders to explore ways to address issues in the community. United Way has established an advisory group to continue the work started at the forum and implement recommendations.
Domestic Violence Summit

In November, United Way hosted over 130 regional leaders to discuss the growing crisis of domestic violence in our community. The summit was the culmination of a year of work by staff and a committee to assess gaps in resources and define needs for the region. Dr. Sujata Warrier, Director of the New York City Program of the New York State Office for the Prevention of Domestic Violence was the keynote speaker and facilitator for the daylong activities. During the summit, violence prevention activities were a major focus of discussion as well as education programs starting at an early age. Top priorities from discussions included increasing housing and shelter options for domestic violence survivors and better prevention and education activities. Following the summit, a Regional Strategic Workgroup was formed to prioritize and execute recommendations from the workgroups over the next year.

Special Awards

At the annual Major Gifts Dinner in September, Mary and Brot Bishop of Pendleton Woolen Mills were honored with the Robert G. Miller Major Gifts Achievement Award. The award recognizes significant leadership, philanthropy and community spirit honors the Bishop’s many years of dedication to supporting the growth of the community. Brot and Mary are dedicated volunteers, having served on many boards (including that of United Way) and led various philanthropic causes. At the event, Roger Hinshaw, president of Bank of America in Oregon and SW Washington was also presented with the James H. Rudd Commitment to Service Award. The award recognized lifetime achievement, commitment and volunteerism in this community and longtime support of United Way.

Community Relief Fund

The Community Relief Fund (CRF) was initiated in spring of 2009 in collaboration with The Oregon Food Bank and Community Action Programs in all four counties to address the growing needs of families hit hardest by the recession. CRF was specifically designed to provide food, rent and utility assistance. By the end of FY10, the program had distributed $1.45 million in assistance to help financially stabilize 14,717 households representing 44,773 families.
**United Way Overhead**

**Based on IRS Form 990**

**2011 EXPENDITURES**

**RETURNED TO THE COMMUNITY**

14.2%

**July 1, 2010 - June 30, 2011**

| Revenue: | 22,292,994 |
| Total public support and revenue | 11,835,377 |

**EXPENSES: 100.0%**

| Program Grants | 5,241,458 |
| Community impact program services | 2,023,207 |
| Supporting services: | 1,915,697 |
| Fundraising campaign management and general | 1,422,382 |
| Total allocations and expenses | 10,602,744 |
| Increase (decrease) in net assets | 1,032,633 |
| Net assets, beginning of year | 5,699,687 |
| Net assets, end of year | 6,732,320 |

**1) United Way of the Columbia-Willamette does not charge our CFC members any dues or fees for belonging to our federation.**

**2) Sources of contributions come from individuals, foundations or corporate gifts.**

---

**United Way of the Columbia-Willamette Financial Information**

The following are audited figures from the fiscal years ending June 30, 2010 and June 30, 2011. Full audited financial are available online at unitedway-pdx.org or by request.

**7/1/09-6/30/10**

**July 1, 2009 - June 30, 2010**

| Revenue: | 21,125,264 |
| Total expenses | 10,525,495 |
| Increase (decrease) in net assets | 253,831 |
| Net assets, beginning of year | 11,141,520 |
| Net assets, end of year | 11,635,377 |

**7/1/10-6/30/11**

**July 1, 2010 - June 30, 2011**

| Revenue: | 21,125,264 |
| Total expenses | 10,525,495 |
| Increase (decrease) in net assets | 253,831 |
| Net assets, beginning of year | 11,141,520 |
| Net assets, end of year | 11,635,377 |

---

**BoD Officers**

**Chair:** Richard High
Riverview Community Bank

**Chair-Elect:** James Rue
Oregon Department of Land Conservation and Development

**Treasurer:** Barbara Mathey
IBEW & United Workers Federal Credit Union

**Secretary:** Sabrina M. Rokovitz
Enterprise Holdings

**Past Chair:** Dan James
PNGC Power

**Kevin Borkowski**
KPMG LLP

**Rob Davidson**
First Independent Bank

**Jill Eiland**
Inel Corporation

**Linda Hall**
Pacific Power

**Scott Hailey**
Insight Company

**Al Jubitz**
Jubitz Family Foundation

**Dwight Kelly**
UPS

**Norwood Knight-Richardson, M.D.**
OHIOU

**Kristin Lewis**
Wells Fargo

**Rosa Lienhart**
Community Leader

**Jaime Lim**
The Asian Reporter

**Josalynne McAarity**
Kaiser Permanente

**Mary Monnal**
LiVorto NW

**Michael Montgomery**
U.S. Bank

**Perry Moore**
The Boeing Company

**Larry Paulson**
Port of Vancouver, USA

**Amy Joseph Pedersen**
Steel Rivers, LLP

**Keith Ristau**
Far West Fibers

**Glenn Rodriguez, M.D.**
Providence Health Systems

**Nancy Sauterhoff**
NVI Natural

**Bob Tackett**
NW Oregon Labor Council

**Win Wiewel**
Portland State University

**EX OFFICIO**

**Sean Edwards**
Chair, Young Leaders Society
Bank of the West

---

**Campaign Cabinet**

**Chair:** Robert Van Brocklin
Steel Rivers LLP

**Co-Chair:** Gregg Kantor
NW Natural

**Vice Chair:** Mike Alexander
Regence Blue Cross Blue Shield of Oregon

**Vice Chair:** Dennis Celmull
Community Volunteer

**Vice Chair:** Tom Elmer
KeyBank

**Laura Bain**
Inter Corporation

**Robert Beck**
Enterprise Holdings

**Vickie Burns**
Labor’s Community Service Agency

**Rodney Cosh**
Office for Children & Families

**John Drew**
Far West Fibers

**Deanna Hailey**
The Boeing Company

**Scott Hailey**
Insight Company

**Richard High**
Riverview Community Bank

**Robert Katsumo**
Ameriprise Financial Services, Inc.

**Dwight Kelly**
UPS

**Jaime Lim**
The Asian Reporter

**Michael Montgomery**
U.S. Bank

**Devon Zavortin Newman**
Schweibl, Williamson & Wyatt

**Barbara Palser**
U.S. Trust, Bank of America

**Larry Paulson**
Port of Vancouver, USA

**John Prevost**
Ashford Inc.

**Mark Poling**
Clean Water Services

**Dan Sillner**
Columbia Distributing

**Suzan Wallace**
Community Volunteer

**Duane Water**
Oasis Trusts North America LLC

**John Willis**
CH2M Hill
These programs receive funding thanks to your investment in United Way's Community Impact Fund.

Adelante Mujeres – Adelante Chicas
Target Population: Washington County; Low-income Latina girls aged 9-18

Arc of Clark County – Parents Receiving Intensive Developmental Education (PRIDE)
Target Population: Clark County; Parents and preschool age children with development disabilities

Asian Health & Service Center – Asian Wellness Connection
Target Population: Multnomah, Washington, Clackamas; Low-income Asian adults and seniors

Benefits Advocacy Coalition – Toward Independence
Target Population: Multnomah; Homeless individuals with disabilities

Bienestar – Semillas de EXITO/Seeds for Success
Target Population: Washington; Low-income Latino residents

Black Parent Initiative – Parent University
Target Population: Multnomah; African American parents and youth

Clackamas Women's Services – Beyond Shelter Housing Initiative
Target Population: Clackamas; Homeless domestic violence survivors

Community Housing Resource Center – Take Charge! – Build Assets, $$$ and Credit Smarts
Target Population: Clark; Low-income households

Bienestar – Semillas de EXITO/Seeds for Success
Target Population: Washington; Low-income Latino residents

Black Parent Initiative – Parent University
Target Population: Multnomah; African American parents and youth

Clackamas Women’s Services – Beyond Shelter Housing Initiative
Target Population: Clackamas; Homeless domestic violence survivors

Community Housing Resource Center – Take Charge! – Build Assets, $$$ and Credit Smarts
Target Population: Clark; Low-income households

Bienestar – Semillas de EXITO/Seeds for Success
Target Population: Washington; Low-income Latino residents

Black Parent Initiative – Parent University
Target Population: Multnomah; African American parents and youth

Clackamas Women’s Services – Beyond Shelter Housing Initiative
Target Population: Clackamas; Homeless domestic violence survivors

Community Housing Resource Center – Take Charge! – Build Assets, $$$ and Credit Smarts
Target Population: Clark; Low-income households

Hacienda CDC – Vamos & Expresiones: Latino & Somali
Target Population: Multnomah; Latino and Somali youth and their parents

Hollywood Senior Center – Senior Medication Assistance Network
Target Population: Multnomah; Seniors

Human Solutions – Resident Services Project
Target Population: Multnomah; Somali and Russian immigrant youth and their families living in affordable housing

IRCO – African Community Collaboration for Economic Self-Sufficiency
Target Population: Multnomah, Washington; African immigrants

Irvington Covenant CDC – Constructing Green Futures
Target Population: Multnomah; Low-income, predominantly African American and women, including people returning to the community after incarceration

Janus Youth Programs – Village Gardens
Target Population: Multnomah; Low-income teens and adults living in public housing

JOIN – Working in Community
Target Population: Multnomah; Chronically homeless individuals

Mercy Corps Northwest – ROAR
Target Population: Multnomah; Formerly incarcerated individuals

Native American Youth & Family Center – Native Student Literacy Project
Target Population: Regional; Native American middle and high school students

Neighborhood House, Inc. – Community Approaches to Building School Success
Target Population: Multnomah, Washington; Refugee and immigrant families and their young children transitioning to kindergarten

Oregon Law Center – Project Against Workplace Sexual Assault
Target Population: Washington; Low-income indigenous farm workers

Outside In – Neighborhood Sparks: Transformation
Target Population: Clackamas; Uninsured and homeless youth and adults

Second Step Housing – Re-Entry Housing Project
Target Population: Clark; Formerly incarcerated individuals re-entering the community

Self-Enhancement Inc – Youth Potential Realized
Target Population: Multnomah; Underserved inner-city youth and families, primarily African American

Virginia Garcia Memorial Health Center – MILPA II
Target Population: Washington; Low-income and primarily Latino patients

Youth Contact – Family Justice Initiative
Target Population: Washington; Families involved in the criminal justice system

Strategic Partnerships and Initiatives

211info – Regional Information & Referral Hotline
211info provides assistance and connects callers with support for a variety of social service needs.

Hands On Greater Portland - Volunteer Mobilization
Connects individual and corporate volunteers with community opportunities.

Born Learning Initiative
Provides information on how to work with children birth to five to create learning opportunities.

Earned Income Tax Credit Assistance (EITC)
Free tax preparation assistance for taxpayers who may be eligible for tax refunds through EITC.

Community Relief Fund
Provides emergency food, rent, utility and prescription assistance.

Project Access Now (PANOW)
A strategic collaboration of hospitals and clinics that organizes charity care throughout region to improve access to medical care for low-income patients.
Collaborating Partners

AARP Tax Aide
Adventist Medical Center
Africa House
Banner Bank
Better People
Boy Scouts
CareOregon
CASH Oregon
Central City Concern
Charles F. Tigard Elementary
Chief Joseph Elementary
Children's Justice Alliance
City of Portland Bureau of Planning and Sustainability
Clackamas County Medical Society
Clackamas County Social Services
Clackamas Service Center
Clarendon-Portsmouth Elementary
Clark County Department of Corrections
Clark County Medical Society
Clark County Parent Coalition
Clark County Public Health
Coalition for a Livable Future
Coalition of Community Health Clinics
Columbia United Providers
Community Action Washington County
Community and Shelter Assistance of Oregon (CASA)
Community Health Partnerships
Community Services Northwest
Community Services of SW Washington
Essential Health Clinic
Fern Hill Elementary
Forest Grove High School
Free Clinic of Southwest Washington
Friendly House
Global Advocates for Inclusiveness
Housing Authority of Clackamas County
Housing Authority of Portland
IBEW Local 48
Impact NW
Inter-Faith Treasure House
Jefferson High School
Kaiser Permanente
KeyBank
Latino Community Resources
Legacy Health System
Lewis and Clark College Indigenous Ways of Knowing Program
LifeWorks NW
Linfield School of Nursing
Markham Elementary
Medical Society of Metropolitan Portland
Metro
Metropolitan Contractor Improvement Partnership
Metzger Elementary
Milwaukie High School
Multnomah County Commission on Children and Families
Multnomah County Health Department
Multnomah County Library
My Story Photography
NAMI
National Association of Minority Contractors
National Indian Child Welfare Association
Neil Armstrong Middle School
New Columbia
New Seasons Market
New Urban High School
Northwest Family Services
Northwest Indian Storytellers (NISA)
Northwest Treeplayers and Farmworkers United (PCUN)
NW Housing Alternatives
OHSU School of Nursing
OHSU-Richmond Clinic
OnPoint Community Credit Union
Oregon 211
Oregon Action
Oregon Association of Liberians
Oregon Department of Human Services
Oregon Employment Department Farmworker Services
Oregon Food Bank
Oregon Tradeswomen, Inc.
OSU Extension Services
Overland Park Coalition
p:ear
Pacific Source Health Plans
Pacific University
Paragon Educational Network
Partnership for Prescription Assistance of Oregon
Phoenix Rising Transitions
Portland Community College Cascade Campus
Portland Farmer’s Market
Portland Housing Center
Portland Nursery
Portland State University
Prison Fellowship Ministries
Project Access Clackamas County
Project Access Clark County
Project Access Multnomah County
Project Access Washington County
Project Clean Slate
Providence Health System
Providence Medical Group
PSU Center for Health and Social Inequality Research
PSU Center for the Improvement of Child and Family Services
Regence BlueCross BlueShield
Retired Senior Volunteer Program
Rosa Parks Elementary
Rosewood Family Health Center
Salvation Army Cascade Division SAFES Program
Salvation Army Clark County
SHARE
Sitton Elementary
Somali Bantu Community Organization
Somali Community Services
Southwest Washington Medical Center
Southwest Washington Parent-to-Parent
State Farm Insurance
Statewide Health Insurance Benefits Advisors
Support for Early Learning and Families (SELF)
Tom McCall Upper Elementary
Tuality Health Alliance
University of Portland School of Nursing
Urban League
Vancouver Housing Authority
Voices Set Free
Volunteer Center of Clark County
Volunteer Connection of Clackamas County
Washington County Commission on Children and Families
Washington County Community Corrections
Washington County Cooperative Library Services
Washington County Health and Human Services
Washington Info-Network 211
Washington State Service Corps
Wells Fargo
Westview High School
Willamette Falls Hospital
Wisdom of the Elders
YWCA Clark County
YWCA of Greater Portland
A SPECIAL THANKS TO UNITED WAY CORNERSTONE PARTNERS WHO COVER OUR OVERHEAD EXPENSES SO THAT EVERY DOLLAR OUR DONORS CONTRIBUTE GOES TO FUND CRITICAL PROGRAMS RIGHT HERE IN OUR COMMUNITY.

DIFFERENT APART UNITED TOGETHER

Join us. Help create opportunities for a better life for all.
WE INVITE YOU TO CONTINUE TO BE A PART OF THE CHANGE

GIVE. ADVOCATE. VOLUNTEER.

United Way of the Columbia-Willamette has been helping people in the four-county region of Clackamas, Multnomah and Washington Counties in Oregon and Clark County in SW Washington since 1920. We are an independent 501(c)(3) nonprofit that is locally managed and governed. United Way of the Columbia-Willamette is a member of United Way Worldwide, a network of nearly 1,800 community-based United Ways in 45 countries and territories.