

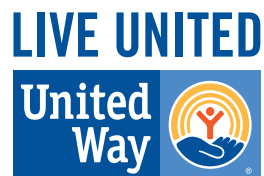
# ANNUAL REPORT 2016

## UNITED WAY OF OLMSTED COUNTY

April 1, 2015 – March 31, 2016



United Way  
of Olmsted County  
[uwolmsted.org](http://uwolmsted.org)



## MESSAGE FROM THE PRESIDENT

As highlighted throughout this report, last year was another very active and productive year at United Way of Olmsted County. By connecting thousands of donors and volunteers throughout our community with strategies grounded in research, we have once again improved lives of people in need and helped make our community a better, healthier place.

All of us want to live in thriving communities with quality education, good health, and strong financial stability – where everyone reaches their potential.

**United Way builds stronger communities** by identifying and implementing solutions that improve individual lives. Our foray into hosting a robust series of community conversations is an example of this in action – this is a key component of our work going forward. Through taking the time to listen, we learn how fellow community members are experiencing life in our community, which grounds our work in the realities faced by many.

A key theme from these recent conversations include that many families and individuals in our community are under enormous financial pressures. Costs related to housing and childcare were often cited as sources of concern. In addition, there is widespread desire to become better connected as a community, to decrease social isolation, to truly get to know neighbors, coworkers, fellow students and other parts of the community.

**We focus on the big picture**, combining a strategic network of programs to meet specific needs, along with advocacy and volunteers to create lasting social change. We create lasting change by encouraging leaders and organizations from all sectors to work together.

On a smaller scale, this is very well represented in the Rochester Community Schools Partnership in the communities of Riverside and Gage Elementary Schools. As lead partner, we bring our facilitation skills and community resource knowledge to coordinate multiple partners to accomplish mutually shared, community defined objectives, leading to improved student learning, stronger families and healthier communities.

**We're changing community conditions** that challenge all lives. We're working together to create lasting change. We're improving lives today for better communities tomorrow.

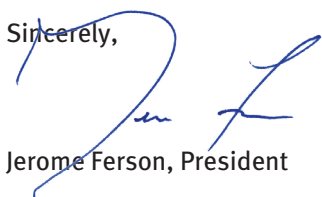
When a child enters a kindergarten class ready to learn, the entire class benefits academically as they proceed closer to schedule. When families are financially stable, neighborhoods thrive.

By providing individuals and families the tools to succeed, we are doing more than helping one person overcome the odds. When we **LIVE UNITED**, we change the odds for thousands of children, adults, families, and ultimately, our communities.

As a community, we are making progress because of donors, volunteers, and advocates like you! United Way brings the community together to help solve problems none of us can address alone.

Thank you for being involved. Stay connected with United Way and be part of something greater than yourself. That's what it means to **LIVE UNITED**.

Sincerely,



Jerome Ferson, President

# LIVE UNITED



## United Way of Olmsted County

### 2015-2016 HIGHLIGHTS

- Helping 37,000+ people in need reach their potential
- Raising \$4,116,852 in support of our work
- Engaging 1,154 volunteers to improve lives
- Providing 4,459 backpacks and school supply kits to local students
- Distributing 1,757 winter coats to people in need
- Connecting 1,712 callers to 3,003 referrals using 2-1-1

### MISSION

Uniting people and resources to improve people's lives in our community.

### VISION

To be an agent of community change that inspires hope, creates opportunity, and champions people in need.

### HISTORY

United Way of Olmsted County was established in 1925 as a community chest fund, and has emerged in the past decade as a community impact organization. The development of the community impact model is the product of a long history that has built upon nearly a century of work to help create a better, stronger and more vibrant community in Olmsted County. Through its entire 90 year history, working together in support of people in need has been the central focus.

### CONTACT

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Rochester, MN 55902

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(507) 287-2000



## COMMUNITY CONVERSATIONS

Over the past several months, the community impact team and volunteers have conducted community conversations with the goal to grow United Way’s understanding of the lived experience of people in Olmsted County. These conversations have deeply influenced the thinking of our staff and volunteer teams. As they continue into the future, community conversations will keep United Way grounded in community knowledge and connected to the lived experience of people in need.

Through these conversations, which were focused on listening to the aspirations of the community, several key things were learned. Chief among those learnings were:

**45**  
Conversations



### CONNECTEDNESS

Lack of social connectedness is the primary condition that people feel challenged by in their lives. This is presented on multiple levels, including a lack of connectedness between groups, individuals, neighbors, and more.

**424**  
People Attended



### AFFORDABILITY

Cost of living is the next most prominent theme. Whether the challenge is affordable housing, affordable childcare, affordable recreation activities or affordable transportation – people living in low-income families and neighborhoods have an increasingly difficult time calling this community home.

**17**  
Facilitation Leaders



### EQUITY

A key theme closely related to social connectedness is a lack of equity in our community. That concern appears to have three different angles: 1) equity of voice: the voices of people with lived experience are not commonly present in decision-making in our community, and their voices go unheard; 2) equity of access: goods and services that are available are often inaccessible for people in need, especially persons of color, for a variety of reasons which are often structural and invisible to those in positions of authority; 3) equity of outcomes: people living in low-income households, and especially people of color, do not succeed in areas such as health care, housing, employment and education with the same regularity that people of wealth and white residents do.



### AWARENESS

Finally, awareness has been raised as a significant concern. Oftentimes, there are services available to people in need but they’re not widely known, and sometimes difficult to uncover.



# COMMUNITY IMPACT REPORT 2015-2016

United Way builds stronger communities by identifying and implementing solutions that improve lives. We focus on local solutions to create lasting change by encouraging leaders and organizations from all sectors to work together.

United Way focuses on the big picture, creating a strategic network of programs meeting specific needs to create lasting social change. Our work unites like-minded programs and services to work together around key areas of need. We unite the community across sectors to provide innovative approaches to social change.



## EDUCATION

When children and youth have strong, stable learning and growing environments, they can be more successful in achieving lifelong success and reaching their potential.

Together, we're providing quality early childhood education, afterschool programs, reading tutors, mentors, youth development programs, books for children, school supplies, and more to ensure future generations are on a path toward success.



## HEALTH

Without good, stable health, people struggle to provide adequate income and pursue education for reaching their potential.

Physical and mental health are foundational requirements to a good quality of life. Together, we're providing health and dental care to people who need it most, preventive dental care education, mental health education, and more to ensure the most vulnerable in our community are able to improve their health.



## INCOME

Living in a financially stable household is a major determining factor in the education and future success of children. Adults without a financially-sustaining income struggle to move forward in creating a good quality of life for themselves and their families.

Together, we're providing job training, financial literacy courses, job coaching, tax filing assistance, and more to help people in our community become more financially stable.



## BASIC NEEDS

Without the necessities of life (i.e. food, shelter, safety and equal access), kids can't focus in school, adults can't reliably be at work, and reaching everyone's potential is impossible.

United Way helps meet the basic needs of food, shelter, and safety in Olmsted County. Together, we're helping seniors remain independent, providing crisis childcare, legal support, safe child visitation, rent assistance, transitional housing, food, winter outerwear, and more to ensure basic needs are being met.

United Way of Olmsted County unites people and resources to improve lives in the community with a focus on the interconnected areas of education, income, health, and basic needs – the building blocks for a good quality of life. When we **LIVE UNITED**, we rise together to overcome barriers limiting our communities from success.

All of us want to live in thriving communities with quality education, good health, and strong financial stability – where people lead happy lives. By providing people the tools to succeed, we can do more than help one person overcome the odds. When we **LIVE UNITED**, we change the odds for thousands of children, adults, families, and ultimately, our communities.

## A SNAPSHOT OF OUR WORK



**1,009**

Children Prepared for Kindergarten

**874**

Youth Had a Supportive Adult in Their Life

**473**

Youth Built Healthy Relationship Skills

*Education unlocks potential. In Olmsted County, 82% of all students graduate on time, but the rate drops to 65% for students on free or reduced lunch programs. Research indicates that students succeeding in school go on to have more successful outcomes as high school graduates. Dropouts are 72% more likely to be unemployed.*



**3,217**

People Received Health Care

**2,343**

People Connected to Mental Health Interventions

**1,512**

Children Received Preventive Dental Care and Education

*Good physical, mental, and dental health increases quality of life. 22% of Olmsted County residents are considered obese, and people with lower education and income have higher rates of oral/dental disease. The community needs stronger mental and dental health systems for those most vulnerable, as well as residents that are under-insured.*



**399**

People Gained Financial Literacy Skills

**114**

People Gained Employment

**115**

Families Achieved Stable Housing

*Over 20 years, cost of living increases have outpaced income growth by more than 300%. Families in financial stress experience more health problems, have poorer performance and attendance at school, and are less likely to have their basic needs being met. Both poverty in children and overall poverty continues to grow in Olmsted County.*



**21,074**

People Received Food Assistance

**1,135**

Seniors Assisted to Maintain Their Independence

**1,757**

People Received Winter Outerwear

*Basic needs are necessary for the prosperous cycle of quality education and strong financial stability to begin creating lasting change in Olmsted County. Homelessness, and food insecurity are not decreasing in the community. More families need a livable income, insurance, housing, transportation, and quality child care.*

# FINANCIALS

Revenue, expenses, assets, and liabilities for the year April 1, 2015 – March 31, 2016.

Visit [www.uwolmsted.org/accountability](http://www.uwolmsted.org/accountability) to view the organization's full audit report.

## REVENUE & EXPENSES

### Revenue

Public Support	\$3,923,704
Donor Selected Designations	-\$813,325
Estimated Uncollectible	-\$168,544
Bequests	\$100,000
Programs & Grants	\$215,577
Building Rental	-\$7,592
Administrative Fees	\$3,958
Investment Income	-\$152,545

**Total Revenue** **\$3,101,233**

### Expenses

Grants & Program Services (Community Fund)	\$2,698,807
Donor Selected Designations	-\$813,325
Initiatives	\$516,427
Community Impact	\$413,128

Development & Fundraising	\$345,279
Management & General	\$287,947
United Way Worldwide Dues	\$40,447

**Total Expenses** **\$3,488,710**

**Change in Net Assets** **-\$387,477**

## ASSETS & LIABILITIES

### Assets

Current Assets	\$4,678,553
Property & Equipment	\$643,708

**Total Assets** **\$5,322,261**

### Liabilities

Current Liabilities	\$1,115,492
Long-term Liabilities	\$45,518

**Total Liabilities** **\$1,161,010**

**Net Assets** **\$4,161,251**

**Liabilities and Net Assets** **\$5,322,261**

## GIVING WITH CONFIDENCE

With a commitment to transparency, accountability and results, United Way of Olmsted County enables you to make a difference right where you live and see the difference you are making.

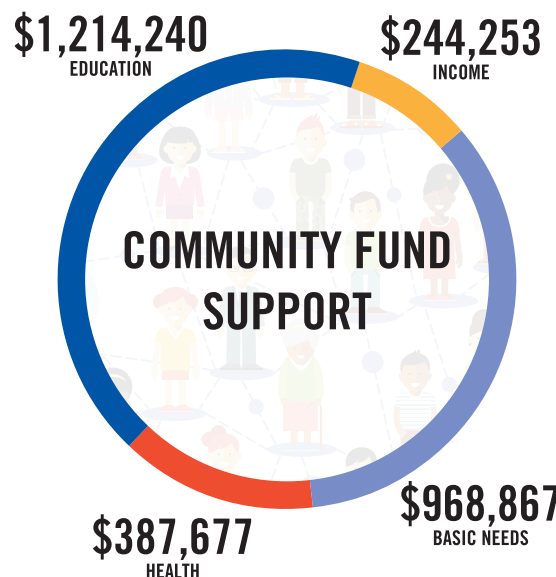
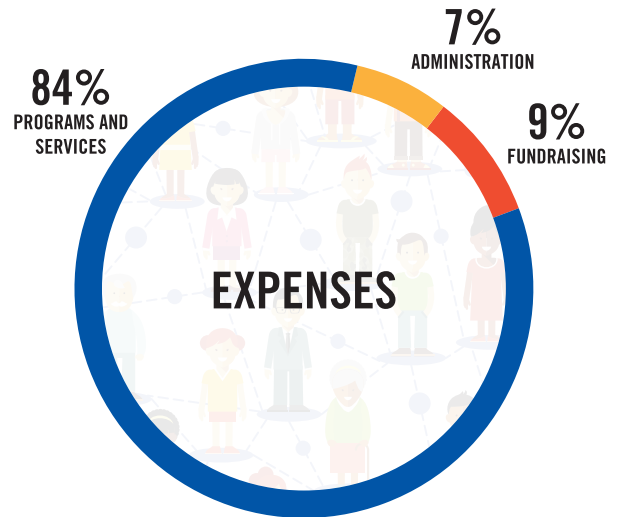


### Charities Review Council: Meets Standards Seal

United Way of Olmsted County meets all 27 Accountability Standards of the Charities Review Council. National guidelines allow for up to 30 percent of donations to be spent on administrative costs. We spend approximately 16 percent.

### Charity Navigator: 4 out of 4 Star Rating

Receiving four out of four stars indicates that your organization adheres to good governance and other best practices that minimize the chance of unethical activities and consistently executes its mission in a fiscally responsible way. United Way is one of just three nonprofit organizations in Olmsted County to receive this honor.





## COMMUNITY SCHOOLS PILOTS LAUNCH

In an exciting new pilot, Rochester Public Schools and United Way have come together to help children and youth reach their potential. The Rochester Community Schools Partnership is a two year pilot launching two community schools, Gage Elementary School and Riverside Central Elementary School.

**Community schools work to improve student learning, build stronger families, and create a healthier community.**

A community school is both a place and a set of partnerships between the school and other community resources. Its integrated focus on academics, health and social services, youth and community development and community engagement leads to improved student learning, stronger families and healthier communities. Community schools offer a personalized curriculum that emphasizes real-world learning and community problem-solving. Schools become centers of the community.



“Each community school is unique in the services it provides and the impact it creates,” said Jesi Johnston, the community schools facilitator for Riverside.

Both Gage and Riverside Central Elementary Schools have completed needs assessments to give insight to how the schools can best impact students and families. This process

entailed surveying staff, students, family members, neighbors of the school, and current partners providing services in the school.

After identifying needs, new partnerships and strategies may be established to support students.

“The desire is that these partnerships will create an impact on students, families, and the neighborhood to provide effective solutions to the information gathered in the needs assessments,” Johnston said.

United Way serves as the lead partner for the Rochester Community Schools Partnership. The community school model empowers teachers to focus on teaching while partners provide wrap-around services to students and their families.



**United Way’s role is to work with partners to mobilize the assets of the school and the entire community to improve educational, health, social, family, and economic results.**

## BOARD OF DIRECTORS 2015-2016

United Way of Olmsted County's board of directors is foremost a guardian of values on behalf of its stakeholders. The board of directors provide strategic leadership and vision through the creation of the strategic plan and policies.

**Chris Nelson, Chair**  
Dunlap & Seeger, P.A.

**Walt Ling, Vice Chair**  
IBM (Retired)

**Jeff Elstad, Treasurer**  
Byron Public Schools

**Patricia Barrier**  
Mayo Clinic (Retired)

**John Edmonds**  
Olmsted County

**Paul Fleissner**  
Olmsted County

**Jeff Hazard**  
RSM US LLC

**Tory Johnson**  
IBM

**Kelly McDonough**  
First Alliance Credit Union

**Virginia W. Merritt**  
Legal Assistance of  
Olmsted County

**Michael Muñoz**  
Rochester Public Schools

**David Oeth**  
RSM US LLC

**Joanne Rosener**  
Mayo Clinic (Retired)

**Don Supalla**  
GRAUC, RCTC (Retired)

**Emily Ties**  
Mayo Clinic

**Diane Wottreng**  
Mayo Clinic (Retired)

## STAFF

**Jerome Ferson**  
President

**Kris Brewer**  
Community and Corporate  
Engagement Director

**Chad Campbell**  
Vice President of  
Community Impact

**Jesica Johnston**  
Community School Site  
Facilitator – Riverside

**Matt Knutson**  
Communications and  
Events Director

**Lindsey Nelson**  
Campaign Specialist

**Dale O'Groske**  
Chief Financial Officer

**Kelly Olsgard**  
Campaign Specialist

**Bonnie Schultz, CFRE**  
Major Gifts and Planned  
Giving Director

**Jennifer Teske, CFRE**  
Vice President of  
Resource Development

**Mary Jo Tittel**  
Community Impact Specialist

**Pam Wright**  
Executive Assistant

## PROGRAM PARTNERS 2015-2016

United Way engages a strategic and diverse network of community supports to help address the complex causes of poverty. These partnerships and the rest of United Way's work help change community conditions that challenge all lives.

### Education

#### Girl Scout Connectz:

Girl Scouts of MN WI  
River Valleys

#### Lead Mentorship:

Olmsted County

#### Olmsted Outdoors:

Quarry Hill Nature Center

#### Rochester Youth

##### Night Campus:

Family & Children's  
Center, Rochester Area  
Family YMCA

#### SAFE: Rochester

Public Schools

#### Sports Mentorship Academy:

Children of Destiny

#### Success by 6: Byron

Community Education,  
Civic League Day  
Nursery, Families First of  
Minnesota, Good News  
Children's Center, Tri-  
Valley Opportunity Council

#### Teacher Training:

The Reading Center,  
Rochester Public Schools

#### Teen Ascent: Boys &

Girls Club, Quarry Hill  
Nature Center

#### Youth Development: Boys &

Girls Club

#### Y-Mentors: Rochester Area

Family YMCA

#### Y-Youth: Children of

Destiny, Rochester Area  
Family YMCA

### Health

#### Community Health Worker:

IMAA

#### Families Matter:

Family Service Rochester,  
NAMI SE MN

#### Good Samaritan Health Clinic,

The Salvation Army

#### Olmsted Happy Teeth:

Children's Dental  
Health Services

#### Rapid Access Clinic: Zumbro

Valley Health Center

#### Silver Creek Corner:

Center City Housing

### Income

#### Family Stabilizer:

Family Promise Rochester

#### Financial Literacy:

Catholic Charities

#### Pathways to College

and Career: Hawthorne

Education Center

#### Refugee Resettlement:

Catholic Charities

#### Transitional Living Case Aid

and Rapid Rehousing:

The Salvation Army

### Basic Needs

**Crisis Nursery:** Families First  
of Minnesota

#### Family Access Center:

Family Service Rochester

#### Food Shelf: Channel One

Regional Food Bank

#### Legal Assistance:

Legal Assistance of  
Olmsted County

#### Meals on Wheels: Family

Service Rochester

#### Noon Meal:

The Salvation Army

#### Project Restore:

Family Service Rochester

#### Rent Assistance:

The Salvation Army

#### Senior Independence

Collaborative:

Elder Network,  
Family Service Rochester,  
The Salvation Army

#### SMATC: Ability

Building Center

#### Supported Employment:

Ability Building Center,  
Possibilities

