

# Green Mountain United Way

United Way fights for the health, education, and financial stability of every person in every community



www.gmunitedway.org

## 2016-17 ANNUAL REPORT

### 2016-17 BOARD OF DIRECTORS

#### Linda Winter, President

Vermont Humanities Council

#### Margaret Pinello-White, Vice President

Blue Cross Blue Shield of Vermont

#### Ruth Greene, Secretary

Blue Cross Blue Shield of Vermont

#### Stacy Pinardi, Treasurer

Dartmouth Hitchcock Medical Center

#### Carol Ellison

Retired, Heney Realty

#### Karen Geraghty\*

Northeastern Vermont Development Assoc.

#### Teija Huttenen-Green

Vermont Land Trust

#### Jenny Hyslop

Vermont Housing & Conservation Board

#### Lauren McElroy Merritt\*

College Steps

#### Dexter Rowe\*

WNUB and WCFR

#### James B. Stewart

Central Vermont Economic Development Corp.

#### Richard Theken\*

Retired, Central Vermont Medical Center

#### Carissa Tomczyk

Norwich University

#### Dan Willis

Edward Jones

### 2016-17 STAFF

Tawnya Kristen, Executive Director

Pamela Bailey, Dir. of Programs & Operations

Nelson Baker, Community Impact Director\*

Beckie Blouin, Admin. & Program Asst.\*\*\*

Laurie Kelty, Resource Coordinator\*\*

Madeleine Roy, Marketing Director\*

Carrie Stahler, Dir. of Funding & Prog. Dev.

\*not current member of board or staff

\*\*new role and title

\*\*\*new employees

### OFFICE LOCATIONS

73 Main Street #33

Montpelier, VT 05602

802-613-3989

1325 Main Street\*

St. Johnsbury, VT 05819

802-745-0101

P.O. BOX 33, 69 Main St.\*

Derby Line, VT 05830

802-647-2148

\*location now closed

Dear Friends,

Our Annual Report is always a welcome opportunity to look back at the growth we've made as an agency and the progress we've made for our communities. This past year was no exception. We solidified our place as a leader through new and innovative programs that continue to support our well-established partnerships, and benefit the community at-large. We strive to address our United Way Priority Areas of **Health, Education and Financial Stability** through work that supports individuals and families through innovation, bringing new resources to old problems, and working together with the many tenacious agencies and leaders in our communities to find the right solutions to the issues facing so many.

In 2016-17 our work in **Education** focused on the needs of young children through leadership in the Barre, Newport, Lyndon, and Northfield Promise Communities.

In the area of **Financial Stability**, we increased support for working families by establishing our first Working Bridges site in the Northeast Kingdom. This has paved the way for three additional program locations. Recognizing the importance of financial literacy we built the foundation of our new, unique K.E.E.P. Financial Coaching Program. This allows us to reach beyond our traditional focus on classes and deliver knowledge more broadly and effectively.

In **Health**, we continued to build bridges to link our work with that of our community partners by addressing the long term health effects of the cycle of poverty, food insecurity, and Adverse Childhood Experiences.

Under our **Community Caring** initiative, we continue to support our local communities by mobilizing the power of volunteer time and talents. We are astounded by the outpouring of monetary and material support for our partnership with Tatum's Totes, which provides backpacks for children entering emergency foster care through the Department for Children and Families.

On behalf of everyone at Green Mountain United Way, we thank you for your ongoing belief in our work and the power to **LIVE UNITED** to create better solutions for every person in our communities. I welcome your continued involvement, whether through the investment of time or treasure, and honor all the ways you have supported our work thus far.

With Gratitude,

Tawnya Kristen, Executive Director



Green Mountain United Way Director Tawnya Kristen and staff members Pamela Bailey and Carrie Stahler receive Northern Border Regional Commission Grant award from Senator Leahy and Governor Scott.

# FINANCIAL OVERVIEW

## WHERE OUR MONEY COMES FROM - REVENUES FOR YEAR ENDED JUNE 30, 2017

### UNRESTRICTED REVENUES

Community Campaign	\$ 457,280
Estimated Uncollectible Pledges	(11,594)
Donor Designations	(133,412)
Other Funding Sources (grants, investment income, etc.)	87,650
<b>TOTAL AVAILABLE</b>	<b>\$399,924</b>

## WHERE THE MONEY GOES - INVESTMENTS & EXPENSES FOR YEAR ENDED JUNE 30, 2017

### INVESTMENTS & EXPENSES

Community Investments (net of donor designations)	\$ 311,640
Donor Designations	133,412
Fundraising Expenses	38,046
Administrative Expenses	81,885
<b>TOTAL EXPENSES</b>	<b>\$564,983</b>

## STATEMENT OF POSITION - AS OF JUNE 30, 2017

### ASSETS

Cash & Certificate of Deposit	\$ 39,588
Pledges, Grants & Contributions Receivable, net	138,694
Other Assets	4,021
Property & Equipment, net	1,588
Beneficial Interest in Assets Held by Others	0
Investments & Endowments	400,820
<b>TOTAL ASSETS</b>	<b>\$584,710</b>

## LIABILITIES AND NET ASSETS

### LIABILITIES

Accounts Payable & Accrued Expenses	\$ 36,668
Allocations & Designations Payable	139,825
Deferred Program Service Revenue	0
<b>TOTAL LIABILITIES</b>	<b>\$176,493</b>

### NET ASSETS

Unrestricted	
Board Designated	\$ 0
Operating	282,471
Temporarily Restricted	25,746
Permanently Restricted	100,000
<b>TOTAL NET ASSETS</b>	<b>408,217</b>
<b>TOTAL LIABILITIES AND NET ASSETS</b>	<b>\$584,710</b>



Volunteers from Spaulding High School & the Community pack food at Capstone in Barre

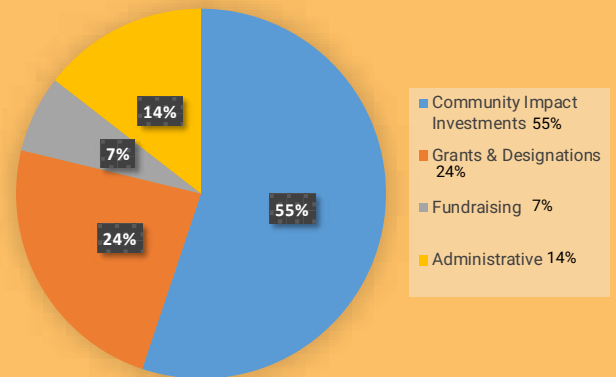
This financial overview details how the contributions raised in the 2015-16 Community Campaign were invested in FY2017. This information was excerpted from our audited financial statements for the year ended June 30, 2017, which are available upon request. Green Mountain United Way does not charge membership dues nor does it use professional fundraisers. A service charge is comprised of the yearly management and general cost of 14% and the yearly fundraising cost of 7% for a total of 21%. Amount Raised: see Financial Statement under INCOME, Campaign line. Sources of contributions: individuals in the public at large, business campaigns, corporate gifts, special events. Administrative costs are covered by deducting a service charge percentage from donations (see Administrative Expenses).



An employee uses a wood working machine at a Working Bridges Program Site in the Northeast Kingdom.

## WHERE THE MONEY GOES

FY ENDING JUNE 30, 2017



## COMMUNITY INVESTMENT PROGRAMS & PARTNERSHIPS

### Accountable Community Health Teams

CAHC Caledonia-Southern Essex  
CAHE Washington County  
ONE Culture of Health (Orleans-Northern Essex)

### Financial Literacy

### Promise Communities

Barre, Newport, Northfield, Lyndon, and St. Johnsbury

### Tatum's Totes Program Partnership

Supporting Foster Children with Backpacks in the Barre, Newport and St. Johnsbury DCF Districts

### Volunteer Connection

### Working Bridges Program

Strengthening Working Families through Resources

### 2-1-1 United Ways of Vermont

# LEADERSHIP GIVERS & COMMUNITY SUPPORTERS

## Thank you!

We would like to thank our individual donors and community partners for their support through employee workplace campaigns, donations, in-kind contributions, event sponsorships, volunteerism, or any combination of these gifts. We recognize the steadfast support of these organizations and individuals; without their support we could not do this important work for our community.

We have done our best to recognize all of our supporters and donors. We apologize if we have missed you, please call our office at 802-613-3989 so we can update our records.

**Pinnacle** (\$10,000+)  
**Anonymous** (2)

**Challenger**  
(\$5000 - \$9999)  
**Stuart Williams**

**Trail Blazer**  
(\$2500 - \$4999)  
**Anonymous** (1)  
**Claudio Fort**  
**Terry J. Moore**  
**Justin P. Wheating**

**Pacesetter**  
(\$1000 - \$2499)  
**Anonymous** (1)  
**Brian Aitchison**  
**Joseph & Jane Alper**  
**Rebecca P. Arnold**  
**Deborah Balserus**  
**Jonathan Biele**  
**Ken Blessing**  
**Daniel C. Bridge**  
**Charles Castle**  
**Andrea & Richard Cate**  
**Sherry Doane**  
**Brian C. Eagan**  
**Ruthellen Greene**  
**Jarrod Grenier**  
**Peter Hood**  
**David & Wilma Kelley**  
**Thomas S. Leavitt**  
**The Machejeski-Labounty**  
**Family Fund**  
**Mark McDonnell**  
**Charlotte L. Mooney**  
**Tim Murray**  
**Frederick Pratt**  
**Peter Ricker**  
**Donald Robisky**  
**Donald Rung**  
**Sarah P. Slatter**  
**Xuejia Miho**  
**Kimberly Whitcomb**

**Pathfinder**  
(\$500 - \$999)  
**Anonymous** (3)  
**Dave Augustoni**  
**Jerry and Pat Balkcom**  
**Gabrielle Bercy**  
**Carol Boucher**

**Linfield Brown**  
**Perry & Nancy Browning**  
**Charitable Foundation**  
**David R. Carlson**  
**Kristin Carlson Ridge**  
**Paul & Sandal Cate**  
**Dr. James & Andrea Chandler**  
**John Colburn**  
**Gretchen Collins**  
**Ken Couture**  
**Shannon Doney**  
**Dr. Stephen & Marty Feltus**  
**Shawn Farley**  
**Mack George Gardner-Morse**  
**Don George**  
**Peter Goodell**  
**Catherine Hamilton**  
**Quinn Hurlbert**  
**Travis Ingraham**  
**Cheryl LaFrance**  
**Stuart Lawson**  
**Joyce & Christopher Martin**  
**Diane Maurao-Gildea**  
**Debora S. Metivier**  
**Sarah Miller**  
**Robert D. Molinaro**  
**Shayne Monfette**  
**Ophillious Parson**  
**Doris Payette**  
**Cynthia Pittinger**  
**Bill Power**  
**Alban & Margaret Richey**  
**Danica Rolfe**  
**Ellen Rowe**  
**Jeffrey Salvador**  
**Jose Santos Madalengoitia**  
**Richard Schneider**  
**Amanda Shiverick**  
**Sarah P. Slatter**  
**Richard Smith**  
**Lorna Swann**  
**Christine Takacs**  
**Donald L. Taylor**  
**Richard Theken**  
**Christopher A. Turley**  
**Jordan Weidman**  
**Ava Whitcomb**  
**Karen Ward**  
**Steven Wood**



Employees support the Holiday Gift Drive at Northfield Savings Bank in Berlin  
Photo: Jeb Wallace- Brodeur, The Times Argus

## COMMUNITY SUPPORTERS

**Pinnacle** (\$10,000 +)  
Blue Cross Blue Shield of Vermont  
FINRA Investor Education Foundation  
Northfield Savings Bank  
Vermont Mutual Insurance

**Challenger** (\$5000 - \$9999)  
Green Mountain Power  
The Employees of the State of Vermont  
Pike Industries  
Shaw's Supermarkets  
University of Vermont  
UPS

**Trail Blazer** (\$2500 - \$4999)  
Central Vermont Home  
Health & Hospice  
Dead River Company  
Hickok Boardman  
Hannaford Charitable Foundation  
North Country Hospital  
Noyle Johnson Insurance  
People's United Bank  
Renewable NRG Systems  
SunTrust Banks

**Pacesetter** (\$1000 - \$2499)  
ADP  
Black River Design  
Comcast  
Community National Bank  
Community Bank, N.A.  
Federal Express  
ITW  
NCCI Holdings  
Nationwide Insurance  
National Life Group

Paige & Campbell, Inc.  
Price Chopper  
Spaulding High School & Barre  
Vocational Center  
TD Bank  
Union Mutual of Vermont  
Vermont Energy Investment  
Corporation  
VSECU  
Washington County Mental  
Health  
Vermont Community Foundation

**Pathfinder** (\$500 - \$999)  
Bourne's Energy  
Cabot Creamery  
Connor Contracting  
First Congregational Church  
of Berlin  
IBM  
KeyBank  
Keurig Green Mountain  
Northeast Kingdom Human  
Services  
Norwich University  
Northstar Fireworks  
Sugarbush Resort  
Tops Markets  
Union Bank  
Vermont Center for  
Independent Living  
Vermont College of Fine Arts  
Vermont Economic  
Development Authority  
Washington Electric Coop



## Green Mountain United Way

73 Main Street #33  
Montpelier, VT 05602



*Proudly serving the  
communities of  
Caledonia, Essex,  
Orange, Orleans,  
and Washington  
Counties of Vermont*

## OUR INITIATIVE AREAS

### HEALTH

We work to increase the health of all individuals by addressing the social determinants of poverty, including food insecurity and physical activity through resource coordination and collective impact projects throughout the region.

**“ We enjoy knowing that we make a difference in the lives of our youth. We feel blessed to be a part of Tatum’s Totes. ”**

*~ Joan V.*

*Tatum’s Totes donation program organizer  
at the First Congregational Church of Berlin*

### EDUCATION

We promote a high-quality accessible system of care and education to ensure the success of all children through partnerships with Promise Communities, Flourishing Communities, and Building Bright Futures Councils. We improve access to books through Children’s Literacy Kit volunteer activities.

### FINANCIAL STABILITY

We support the financial health and well-being of all families with a special focus on working families to help end the cycle of poverty in many of our communities. Our focus is to improve access to resources through our Working Bridges Program and to improve access to financial literacy knowledge through the K.E.E.P. Financial Coaching program.

### COMMUNITY CARING

We engage individuals and partners in activities which enhance the quality of life in our communities, making them safer, healthier and more vibrant. Included in this work are projects in housing, Volunteer Connection, basic needs support including funds for heating assistance, and support of Vermont 2-1-1 statewide telephone resource and referrals program through the United Ways of Vermont.