

Green Mountain United Way

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



2017-18 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
- Renee Ancel**
Community Member
- Carol Ellison**
Retired, Heney Realty
- Teija Huttunen-Green**
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- Michael Rama**
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- James B. Stewart**
Central Vermont Economic Development Corp.
- Carissa Tomczyk**
Norwich University
- Dan Willis***
Edward Jones

2017- 18 STAFF

- Tawnya Kristen, Executive Director**
- Pamela Bailey, Dir. of Programs & Operations****
- Beckie Blouin, Admin. & Programs Assistant**
- Laurie Kelty, Resource Coordinator**
- Heather Labounty, Resource Coordinator*****
- Carrie Stahler, Dir. of Comm. Engagement****

*not current member of board or staff
**new role/title
***new employee

OFFICE LOCATION:

73 Main Street #33
Montpelier, VT 05602
802-613-3989

2017-18 ANNUAL REPORT

Dear Friends,

Last year, through the efforts of our staff, volunteers, partners, and supporters, we were able to improve the health, education, and financial stability of individuals and families within Central Vermont and the Northeast Kingdom.

On behalf of our talented staff, our dedicated board, and the many volunteers who lead with their hearts and serve their community through Green Mountain United Way, I thank you for being part of this work. **Your continued involvement is what makes this organization special and creates lasting changes.**

As Green Mountain United Way continues to change and grow, we are able to see the direct impact of our programs and strategic partnerships. We continue to focus our efforts in the United Way priority areas of **Health, Education, and Financial Stability** through programs like Working Bridges by bringing human services resources to employees at partner businesses, or K.E.E.P. Financial Coaching which supports nonprofits by empowering client-facing staff to address the financial issues at the heart of situational or generational poverty. These programs provide resources, training, and support to those we serve through multiple channels and impact more broadly than one agency could ever do alone. **This is truly the power of the United Way.**

This focus on collaboration and community is exactly what LIVE UNITED means. **It is demonstrated** by the volunteers who came out to build a playground in Northfield. **It shines through** the caring items delivered to our office to support foster children through our partnership with Tatum's Totes. **We hear it in each story** our K.E.E.P. Financial Coaches share when they are now able to help a client change their life through financial coaching. **We see it in the eyes** of the struggling Vermonters who visit us at our Working Bridges sites when they receive the resources and support they need to improve their lives.

The caring power of all people joining together under the common belief that when one person, community or agency thrives, we all benefit. **Together, as we LIVE UNITED, we see these challenges as opportunities for our communities to shine.**

With Gratitude,

Tawnya Kristen, Executive Director



Employees at Blue Cross & Blue Shield of Vermont, Northfield Savings Bank, and other local businesses work on volunteer projects at Washington County Mental Health and Heaton Woods Senior Living Residence during the 2018 Day of Caring.

FINANCIAL OVERVIEW

WHERE OUR MONEY COMES FROM - REVENUES FOR YEAR ENDED JUNE 30, 2018

UNRESTRICTED REVENUES	
Community Campaign	\$ 514,107
Estimated Uncollectible Pledges	(10,783)
Donor Designations	(97,637)
Other Funding Sources (grants, investment income, etc.)	158,669
TOTAL AVAILABLE	\$564,356

WHERE THE MONEY GOES - INVESTMENTS & EXPENSES FOR YEAR ENDED JUNE 30, 2018

INVESTMENTS & EXPENSES	
Community Investments (net of donor designations)	\$ 257,684
Donor Designations	97,637
Fundraising Expenses	64,607
Administrative Expenses	74,818
TOTAL EXPENSES	\$397,109

STATEMENT OF POSITION - AS OF JUNE 30, 2018

ASSETS	
Cash & Certificate of Deposit	\$ 61,459
Pledges, Grants & Contributions Receivable, net	166,195
Other Assets	8,938
Property & Equipment, net	952
Beneficial Interest in Assets Held by Others	0
Investments & Endowments	482,868
TOTAL ASSETS	\$720,412

LIABILITIES AND NET ASSETS

LIABILITIES	
Accounts Payable & Accrued Expenses	\$ 44,299
Allocations & Designations Payable	100,649
Deferred Program Service Revenue	0
TOTAL LIABILITIES	\$144,948

NET ASSETS	
Unrestricted	
Operating	\$ 452,523
Temporarily Restricted	22,941
Permanently Restricted	100,000
TOTAL NET ASSETS	575,464
TOTAL LIABILITIES AND NET ASSETS	\$720,412



Working Bridges Resource Coordinator Laurie Kelly works with an employee at a local worksite. This financial overview details how the contributions raised in the 2016-17 Community Campaign were invested in FY2018. This information was excerpted from our audited financial statements for the year ended June 30, 2018, 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 a yearly % of management, general cost and fundraising. 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).

COMMUNITY INVESTMENT PROGRAMS & PARTNERSHIPS



Second Cohort of K.E.E.P. Financial Coaches, Program Director Pam Bailey, center, and trainer Liz Scharf, center right, pose after the Spring 2018 intro course.

Accountable Community Health Teams

NEK Prosper - Caledonia-Southern Essex Counties
 THRIVE - Washington & Northern Orange Counties
 ONE Culture of Health - Orleans & Northern Essex Co.

Building Flourishing Communities

serving communities in Caledonia, Essex, Orange, Orleans and Washington Counties

K.E.E.P. Financial Coaching Program

Supporting nonprofits & their clients with financial literacy and behavior-change coaching

Literacy Kits

Volunteer-built Literacy Kits for ages 0-5 in the Caledonia, Essex, Orange, Orleans, and Washington Co. distributed to children at summer meal sites

Promise Communities

Supporting the communities of Northfield & Lyndon

Tatum's Totes Program Partnership

Supporting foster children with backpacks in the Barre, Newport and St. Johnsbury DCF Districts

Volunteer Connection

Connecting volunteers to nonprofits and opportunities to give back throughout our region

Working Bridges Program

Strengthening working families through resources at participating worksites

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, volunteering, or any combination of these gifts. We recognize the steadfast support of these individuals and organizations; the work Green Mountain United Way is able to do in our communities is possible due to their support and investment.



Employees at Blue Cross & Blue Shield of Vermont, Northfield Savings Bank, and other local businesses work on volunteer projects at Washington County Mental Health and Heaton Woods Senior Living Residence during the 2018 Day of Caring.

LEADERSHIP DONORS

Pinnacle (\$10,000+)
 Anonymous (2)
 Robin Davey Irrev. Trust

Challenger (\$5000 - \$9999)
 Johnnie L. Stones

Trail Blazer (\$2500 - \$4999)
 Anonymous (1)

Charlotte Mooney
 Dr. Stuart Williams
 Brook & Matt Calhoun
 Terry Moore

Pacesetter (\$1000 - \$2499)
 Anonymous (4)
 Joseph & Jane Alper
 Stewart & Rebecca Arnold
 Ken Blessing
 Charles Castle
 Sherry Doane
 Brian C. Eagan
 Ruthellen Greene
 Jarrod Grenier
 David & Wilma Kelley
 Thomas S. Leavitt
 The Machejeski-Labounty Family Fund

Richard Milius
 Sarah Miller
 Frederick Pratt
 Donald Robinsky
 Kelly Ross
 Amanda Shiverick
 Christine Takacs
 Ava Whitcomb
 Kimberly Whitcomb

Pathfinder (\$500 - \$999)
 Anonymous (6)
 Dr. Michael & Marion Abajian
 Dave Augustoni
 Kathryn Austin
 Jerry and Pat Balkcom
 Timothy Barre
 Gabrielle Bercy
 Justin Bourgeois
 Linfield & Roberta Brown
 Paul & Sandal Cate
 Dr. James & Andrea Chandler III
 Ana Cumming
 Michael Davio
 Theresa Doyle
 Dr. Stephen & Marty Feltus
 Terenece Field
 Mr. & Mrs. Eugene Galfetti
 Don George
 Catherine Hamilton
 Quinn Hurlbert
 Jenny Hyslop
 Cheryl LaFrance
 Richard Lord
 Joyce & Christopher Martin
 Debora S. Metivier
 Xuejia Miao
 Robert Miller
 Robert D. Molinario
 Shayne Monfette
 Annette Olson
 Gary & Sylvia Parker
 Ophilius Parson
 Rebecca Post
 Peter Rawes
 Alban & Margaret Richey
 Richard Schneider
 Amanda Shiverick
 Donald L. Taylor
 Richard Theken
 Christopher A. Turley
 Oliver Twombly
 Steven Wood

COMMUNITY SUPPORTERS

Pinnacle (\$10,000 +)
 Blue Cross Blue Shield of Vermont
 Combined Federal Campaign
 Green Mountain Power
 Northfield Savings Bank
 UPS
 Vermont Mutual Insurance

Challenger (\$5000 - \$9999)
 Hannaford
 The Employees of the State of Vermont
 Northeastern Vermont Regional Hospital
 Norwich University
 NRG Systems
 Pike Industries
 TD Bank
 VSECU

Trail Blazer (\$2500 - \$4999)
 Edward Jones Vermont Offices
 Hickok & Boardman
 Price Chopper
 SunTrust Banks
 University of Vermont
 Vermont Energy Investment Corp.
 The Wayside Restaurant

Pacesetter (\$1000 - \$2499)
 ADP
 Barre Housing Authority
 Central Vermont Home Health & Hospice
 Comcast
 Community Bank, N.A.
 Community National Bank
 Darn Tough Vermont
 Green Mountain Crossfit
 Hypertherm, Inc.
 Imperial Distributors, Inc.
 ITW
 Logikcull Logik
 National Life Group

Nationwide Insurance
 North Country Hospital
 Northeast Kingdom Human Services
 Noyle Johnson Insurance
 Paige & Campbell, Inc.
 People's United Bank
 Spaulding High School & Barre Vocational Center
 Walmart Stores
 Washington County Mental Health
 Washington Electric Co-op

Pathfinder (\$500 - \$999)
 Aetna Foundation
 Black River Design
 Cabot Creamery
 Connor Contracting
 Downs Rachlin Martin
 Engleberth Construction Co.
 First Congregational Church of Berlin
 Granite City Group Fitness
 Green Light Real Estate
 IBM
 KeyBank
 Liberty Mutual Insurance Group
 Lincoln Financial
 NorthCountry Federal Credit Union
 Retirement Solutions
 Tops Markets
 Union Bank
 Union Mutual Fire Insurance
 Vermont Captive Insurance Association
 Vermont Center for Independent Living
 Vermont Economic Development Authority
 Vermont 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.

“
*Becoming a Financial Coach has given me the tools I need to help people see that **BIG dreams start with a little savings.***
”

~ Ramsey Papp

*United Way K.E.E.P. Financial Coach and
Family Services Specialist at Capstone
Community Action*

EDUCATION

We promote a high-quality accessible system of care and education to ensure the success of all children through partnerships with Promise Communities, Building Flourishing Communities, and Building Bright Futures Councils. We improve access to books through Childrens' 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.