

2004 Annual Report

United Way of the Columbia-Willamette



what matters.™





For 85 years, the United Way of the Columbia-Willamette has been dedicated to improving our community by changing lives in Clackamas, Clark, Multnomah and Washington counties. United Way is a caring force of volunteers and individual and corporate community investors working to help people live with opportunity, hope and support in times of need.

Through its workplace giving program and special events and grants, each year United Way raises millions of dollars and strategically distributes this money back into our communities' human and social services. For the year 2003, our last fully audited financials show that United Way raised \$15,035,045. Our 2004 campaign, which ends June 30, 2005 shows that we raised a projected total of \$16.1 million.

These monies have been used to assist in the funding of 90 agencies and 154 programs in the four counties we serve. In addition, these funds are used to assist in the development of unique community initiatives and programs that further the United Way mission.

Examples of these include . . .

- The 2-1-1 telephone center that helps connect people with human and social services.
- The Earned Income Tax Credit program aimed at helping low income families.
- The State of Oregon Individual Development Account Program that helps low income families learn and save for the purchase of their own home.
- The United Way Corporate Volunteer Program which last year matched 1,600 volunteers with hundreds of projects throughout our four counties.
- The newleaders Program that is directed towards fostering improved leadership skills and opportunities for emerging young community leaders.

In addition to the above, United Way plays a vital role in our communities by its work within more than 800 work place groups. Staff and volunteers meet with employees of these businesses and organizations and help to educate and raise awareness of the many community needs and health and social service issues. United Way staff also provides health and social service agencies with a variety of technical services and marketing support that helps make their jobs more efficient and successful.

For more information, or to volunteer in your community, visit our website at www.unitedway-pdx.org, or call 503-228-9131 in Portland, or 360-696-0341 in Vancouver.

Financial Information

July 1, 2003 - June 30, 2004

PUBLIC SUPPORT AND REVENUE

Public Support

Pledge income - including amounts raised for others	13,353,171.
Grants and bequests	300,508.
Donated services	350,021.

Total public support 14,003,700.

Provision for uncollectible pledges	(670,946.)
Less amounts designated to others	(2,771,875.)

Revenue

Community service fees	141,363.
Net revenue from special events	124,592.
Rental income	165,468.
Prior campaign pledge recovery	375,058.
Other	224,864.

Total Revenue 1,031,345.

Total public support and revenue 11,592,224.

EXPENSES

Allocations and payments to affiliates	5,979,641.
Community impact program services	1,413,660.

Supporting services

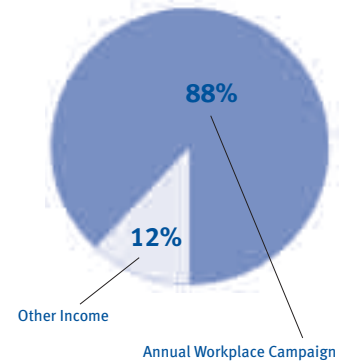
Fund-raising campaign	2,235,965.
Management and general	1,529,364.

Total allocations and expenses 11,158,630.

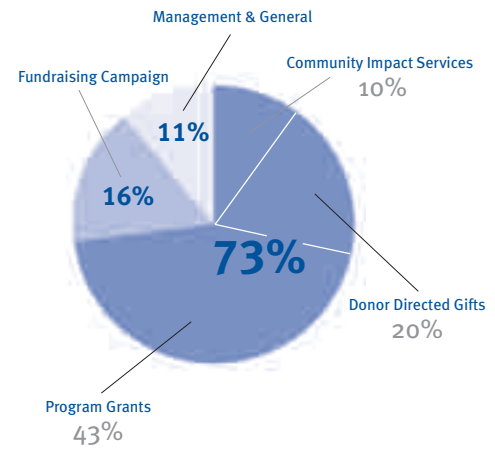
Increase (decrease) in net assets	433,594.
Net assets, beginning of year	3,040,293.
Net assets, end of year	3,473,887.

Source of Income

15,035,045.



2004



Expenditures

Audited Financial Statements available upon request.

Board of Directors

- Daniel Bernstine** - Portland State University
- Jay Bloom** - Morrison Child and Family Services
- Julie Branford** - SEH America
- Debbi Covert** - American Federation of Teachers - Oregon
- Sho Dozono** - Azumano Travel
- Bertha Ferran** - Windermere Mortgage Services
- Tina Foster** - US Bank
- James Francesconi** - Attorney
- Andrew Haller** - PacifiCorp
- Anthony Harris** - Unbounded Grace
- * **Rebecca Jewett** - Norm Thompson Outfitters, Inc.
- Michael Jordan** - Metro
- Gregg Kantor** - NW Natural
- Steven Klitz** - Ironstone Bank
- Bernie Kronberger** - Wells Fargo
- * **David Lippoff** - KOIN TV
- * **Shelley Marchesi** - Housing Authority of Portland
- * **Timothy McMahan** - Stoel Rives, LLP
- * **Peter Melhuish** - Community Leader
- Martin Moll** - KPMG
- Mary Monnat** - Lifeworks NW
- Michael Morgan** - Attorney
- Judy O'Connor** - NW Oregon Labor Council, AFL-CIO
- * **Paul Oldham** - Tektronix, Inc.
- ** **Jeremy Sarant** - Attorney
- * **Patrick Stickel** - The Oregonian
- * **Carl Talton** - Entrepreneurial Community Collaborative
- * **Richard Woolworth** - Community Leader
- Michael Worthy** - Bank of Clark County

** Board Chair * Executive Committee

Chief Administrative Personnel

- Brent A. Stewart, Sr.** - President / CPO, United Way of the Columbia-Willamette
- Carol Frye** - Chief Operating Officer, United Way of the Columbia-Willamette

United Way Office and Contact Information

United Way of the Columbia-Willamette

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www.unitedway-pdx.org

Hours of Operation

Monday – Friday | 8:30am – 5:00pm