

2016 Chenango United Way Annual Report



Chenango United Way
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March 1, 2017

Dear Chenango Community:

2016 was another amazing year for the Chenango United Way! We were so proud to collaborate with you, our community, on a number of very meaningful projects and another very successful fundraising campaign. Thank you letting us be a part of your year!

Education- Dolly Parton Imagination Library

For two years, the Chenango United Way has been collaborating with the public libraries of Chenango County to increase the early literacy levels of children aged birth through age 5. Through the Books from Birth/Dolly Parton Imagination Library initiative, books are made available to children through the mail regardless of family situation or income level. To date, more than 1,283 children have enrolled in the project across Chenango County. Starting in 2017, we will begin looking at the impact this program is having on kindergarten readiness.

Health- Greater Chenango Cares IRT

July 2016 brought the second year of the Greater Chenango Cares IRT project to our community. Last year, the Chenango United Way was pleased to serve as the lead agency for the initiative that brought 185 military service men and women to Chenango County to provide no-cost medical, dental, vision and veterinary care to the un-insured and under-insured of our region. Total final numbers for the 2016 project:

- Medical Clinic- 1,387 services
 - Physical therapy- 472 services
 - Nutrition counseling- 257 services
 - Nurse counseling- 1,674 services
 - Pharmacy- 639 services
- Dental Clinic- 2,350 services
- Optometry Clinic- 2,354 services
 - No cost glasses- 577 pairs
- Veterinary Clinic- 690 services
- **Total 2016 services- 10,310**
- **Total 2016 unduplicated patients- 1,850**
- **Total value of the services provided back to the community in 2016- \$914,904**

Over the 10-day IRT event, more than 400 volunteers gave of their time and talents. The estimated in-kind value of this time totaled more than \$92,000. We could not have held this event without the generosity of these volunteers! Thank you so much to each and every one of you, as well as to the IRT Steering Committee members who helped to plan this event for the many months leading up to July:

- Incident Commander- Matt Beckwith, Chenango County Emergency Services
- Public Information Officer- Victoria Mitchell, Chenango United Way
- Military Liaison- Caroline Quidort, Southern Tier East Regional Planning Development Board
- Chenango County Lead Official- Donna Jones, Chenango County Planning Dept.
- Operations Section Chief- A Jones, Chenango County Sheriff's Dept.
- Planning Section Chief- Shane Butler, Chenango County Planning Dept.
- Deputy Planning Chief- Chris Paul, Chenango Health Network
- Logistics Section Chief- Joe Angelino, Retired, Norwich City Police Chief
- Finance and Administration Section Chief- Shelly Bartow, Morrisville State College
- Deputy Finance and Admin Chief- Karen Sastri, NBT Bank
- Volunteer Division Chair and Zone 1 Leader- Joyce Zummo,
- Veterinary Division Chair- Annette Clarke, Chenango County SPCA
- Facilities Chair- Stan Foulds, Norwich City Schools
- IT Chair- Jeff Smith
- Summer Interns- Jackie Hanrahan (Colgate University) and Marissa Mitchell (Keuka College)

Finally, thank you to everyone who believed in the value of this project and invested in it with funds and products from day one: The Community Foundation for South Central New York, The RC Smith Foundation, Norwich Rotary, Southern Tier East Regional Planning Board, Norwich United Church of Christ, Norwich Elks Club, Broad Street Methodist Church BID, Chobani, Norwich City Schools, Chenango Memorial Hospital, Bassett Hospital, Chenango County SPCA, Chenango County Planning Dept., Chenango County Emergency Services, Chenango Health Network, Chenango County Sheriff's Dept, Norwich City Police Dept., Gilligan's and Fine Line Graphics.

Health- Building a Healthy Community Coalition

In 2016, we were very excited to be asked to partner with the Chenango County Health Department and Chobani on the Chobani Healthy Challenge, a summer-long health and wellness challenge aimed at increasing fitness and nutrition awareness in Chenango County, in an effort to reduce our County's overall obesity rate. Last summer, more than 203 individuals participated in the challenge that kicked off at Friends of Rogers Center in June and ended at the Chenango County Fairgrounds in September. The Challenge will run again in 2017, but a FitPath will also be constructed at Weiler Park in Norwich to complement the program. Generously underwritten by Chobani, the FitPath will provide for several high-quality outdoor fitness stations to be constructed and available to the community as part of the project. We are very excited to see our community use these stations to "get fit"!

Income- The ALICE Project

ALICE stands for Asset Limited, Income Constrained, Employed. The United Way ALICE Project, now in 15 states, provides the means to better understand the struggles of those households above the federal poverty level but with insufficient resources to be economically sustainable. United Way of NYS commissioned a report in 2016 to better understand NYS ALICE and ALICE's underlying conditions. The research-based report provides the data and the context for United Ways and their partners to seek solutions. This is in keeping with the United Way tradition of customized solutions to address key community conditions and opportunities. We believe the ALICE report will significantly contribute to dialogue about poverty and how to make our help more effective. We will be convening conversations throughout 2017 to look at this data and begin to discuss ways to assist the ALICE population in our community.

In Chenango County, 45% percent of all the people who live here are classified as "ALICE" (25%) or live below the Federal Poverty Level (15%). This means they are not earning enough to "get by" based on a household survival budget that uses conservative estimates of monthly expenses for housing, child care, food, transportation, health care and taxes. ALICE is essential to our communities' economic well-being. ALICE takes care of our children and our elderly residents. ALICE works in food service, as secretaries and administrative assistants and as office clerks. ALICE keeps our schools and offices clean and provides home health services. ALICE rings out our groceries and other retail purchases, works as security guards, stocks shelves and fills orders. We all know ALICE.

Fundraising- Fall 2016 Campaign

The fall of 2016 brought another annual campaign and an ambitious goal of \$419,000 was set. Led by Jerri Webb of Frontier Communications and John Antonowicz of Wilson Funeral Home, this year's campaign was a challenging one. Industrial campaigns struggled, while residential and small business campaigns flourished. The total number of gifts was down, but per capita giving was up. We launched the Chenango-oploy game in early 2016 and sold 192 games throughout the year...an exciting accomplishment and a great creative addition to our campaign revenue!

For weeks we held at 50% of our goal and wondered if we would ever surpass even the 80% mark. When we finally closed the campaign on January 13, 2017, we were shocked...our campaign had surpassed \$419,000 and we raised \$420,411...100% of our goal!!! Thank you to each and every one of you who have helped to make the Chenango United Way a success this year. Miracles really do happen. Once again, I am reminded of what an amazing community this is to live in and how proud I am to call Chenango County my home. So many of you have given of your time, your talent and your treasure to so many wonderful causes and it truly does make a difference! Thanks for making the United Way one of them. I hope you know how much you mean to me and to this community.

With gratitude-

Elizabeth

Elizabeth Monaco

Executive Director

2016 Board of Directors

<u>Term</u>	<u>Officer</u>	<u>Name</u>	<u>Company</u>
2011-2013, 2014-2016	Treasurer	TJ Moorehead	Retired, P&G Pharmaceuticals
2012-2014, 2015-2017		Kendall Drexler	Hospice
2013-2015, 2016-2018		Dan Wagner	Retired, P&G Pharmaceuticals
2013-2015, 2016-2018		Gina Goldman	Norwich-Alvogen
2013-2015, 2016-2018	Board Chair	Terra Carnrike-Granata	NBT Bank
2014-2016, 2017-2019		Bryan McCracken	City of Ithaca
2014-2016, 2017-2019		Whitney Downey	NBT Bank
2014-2016, 2017-2019		Elizabeth Bunce	Commerce Chenango
2014-2016, 2017-2019	Campaign Co-Chair	John Antonowicz	Wilson Funeral Home
2014-2016, 2017-2019		Mat White	Snyder Communications
2015-2017, 2018-2020	Vice Chair	Angela Hulbert	Preferred Mutual Insurance Co.
2015-2017, 2018-2020	Community Impact Chair	Rebecca Hargrave	Morrisville State College
2015-2017, 2018-2020	Campaign Co-Chair	Jerri Webb	Frontier Communications
2015-2017, 2018-2020		John Stafford	NBT Bank
2015-2017, 2018-2020		Anne Drexler	Retired, P&G Pharmaceuticals
2016-2018, 2019-2021		Ted Guinn	Chenango County, Dept. of Weights & Measures
2016-2018, 2019-2021		Pam Mealey	Pro-Tel
2016-2018, 2019-2021		Bruce Beadle	Kerry
2016-2018, 2019-2021		Deb Barker	NBT Bank
2016-2018, 2019-2021		Shelly Bartow	Liberty Partnerships Program, Morrisville State College

Fall 2016 Campaign Final Report

<u>Division</u>	<u>Raised to Date (as of 1.13.16)</u>	<u>% of Goal</u>	<u>Fall 2016 Goal</u>	<u>Given in Fall 2015</u>
Agencies/Community Partners	\$2,934	45%	\$6,500	\$6,023
<i>Chenango-opoly</i>	\$6,732			
<i>City of Norwich Employees</i>	\$386	103%	\$375	\$308
<i>Community Foundations</i>	\$3,233	101%	\$3,216	\$3,216
<i>Chenango County Employees</i>	\$3,548	79%	\$4,500	\$3,914
<i>Day of Caring/Kick-Off</i>	\$1,728	115%	\$1,500	\$1,648
<i>Golf Tournament</i>	\$1,982	50%	\$4,000	\$4,538
<i>Hospital</i>	\$9,522	119%	\$8,000	\$7,499
<i>Industry</i>	\$282,347	96%	\$294,737	\$289,379
<i>Leaders in Giving</i>	\$37,695	91%	\$41,219	\$41,219
<i>Miles of Quarters</i>	\$190	95%	\$200	\$0
<i>P&G Retirees</i>	\$10,054	107%	\$9,390	\$9,390
<i>Professionals</i>	\$7,720	132%	\$5,830	\$5,830
<i>Residential</i>	\$27,328	119%	\$22,894	\$22,894
<i>Restaurants</i>	\$0	0%	\$250	\$0
<i>Schools</i>	\$13,219	120%	\$11,000	\$9,636
<i>SEFA (state employees)</i>	\$881	52%	\$1,689	\$1,689
<i>Small Business</i>	\$2,716	136%	\$2,000	\$1,834
<i>Unsolicited</i>	\$7,697	513%	\$1,500	\$5,285
<i>Churches</i>	\$500	250%	\$200	\$200
Total	\$420,411	100%	\$419,000	\$414,502
<i>Designations from Other UW's</i>	\$10,400			\$11,476
Grand Total	\$430,811			\$425,978

2016 Community Allocations

<u>Focus Area</u>	<u>2016 Allocation</u>	<u>Agency</u>	<u>Program</u>
Education	\$15,000.00	Guernsey Memorial Library	Books from Birth/Dolly Parton Imagination Library Program
Education	\$22,704.89	The Place	Headwaters Youth Conservation Corps Program
Education	\$22,918.32	The Place	KIDS Program
Education	\$16,318.77	The Place	Teen After School Program
Education	\$22,051.51	The Place	Chenango Youth Philanthropy Council (YPC) Program
Income	\$18,290.58	Catholic Charities	Shelter Plus Care Program
Income	\$23,039.62	Cornell Cooperative Extension	Grow, Cook, Serve Program
Income	\$19,701.72	The Impact Project	The Impact Project Program
Income	\$6,396.45		Chenango County Food Pantries and Soup Kitchens
Health	\$17,575.39	Catholic Charities	Options Counseling Program
Health	\$18,940.86	Mothers & Babies Perinatal Network	Norwich PAL Family Support and Mentoring Program
Health	\$23,767.33	Chenango Health Network	Financial Assistance for Breast Cancer Patients
Health	\$23,199.51	Chenango Health Network	Prescription Assistance Program
Health	\$2,748.90	Danielle House	Housing Chenango County Residents During Medical Care in Broome
Health	\$19,954.82	Family Planning of SCNY	Access to Health Care
Health	\$22,115.79	Cornell Cooperative Extension	Grow, Cook, Eat Program
Health	\$3,951.06	Family Planning of SCNY	Family Planning Education- Teens Count
Health	\$5,000.00		Greater Chenango Cares IRT
Health	\$3,246.06		Building a Healthy Community Coalition
Community Support	\$2,000.00		2-1-1 Information and Referral Hotline
Total	\$308,921.58		

2016 Operating Budget

	<u>2016 Budgeted</u>	<u>Actual (as of 12.31.16)</u>	<u>% of Budgeted</u>
<i>Payroll</i>	<i>\$88,851</i>	<i>\$88,652</i>	<i>100%</i>
Health Insurance	\$8,592	\$8,595	100%
SIMPLE IRA Retirement	\$2,666	\$2,656	100%
FICA	\$6,664	\$6,781	102%
Payroll Expense	\$1,200	\$1,139	95%
NYS Worker's Comp Insurance	\$750	\$521	69%
Group Disability Insurance and NYS Disability	\$800	\$358	45%
<i>Total Employee Benefits</i>	<i>\$20,672</i>	<i>\$20,050</i>	<i>97%</i>
Total Employee Expenses	\$109,523	\$108,702	99%
NYS Disability Insurance	\$90	\$89	99%
Director's & Officer's Liability Insurance	\$900	\$878	98%
Business Owners Insurance	\$630	\$717	114%
Transfer for technology	\$2,000	\$2,000	100%
Technology Software Upgrades	\$100	\$166	166%
Technology Service Contract	\$2,000	\$2,194	110%
Technology Back-Up (Carbonite)	\$425	\$420	99%
Audit	\$8,050	\$8,325	103%
Interest from Savings	(\$15)	\$17	-113%
Miscellaneous and Other	\$500	\$52	10%
Rent	\$8,375	\$9,075	108%
Utilities	\$1,000	\$859	86%
Repairs & Maintenance	\$500	\$273	55%
Donation Tracker Annual Maintenance	\$1,375	\$1,350	98%
Books & Subscriptions	\$400	\$467	117%
Office Supplies	\$700	\$281	40%
Off-set to Office Supplies from Otis Thompson Fund	(\$4,000)	(\$4,407)	110%
Copier Lease	\$1,728	\$1,598	92%
Postage Supplies	\$800	\$824	103%
Telephone/Internet/Cell Phone	\$3,800	\$3,973	105%
Dues/Professional Memberships	\$5,200	\$6,060	117%

Office Expenses	\$34,558	\$35,211	102%
Mileage Reimbursements	\$1,250	\$948	76%
Conferences, Trainings and Meetings	\$2,000	\$3,669	183%
Staff Expenses	\$3,250	\$4,617	142%
Advertising	\$1,250	\$870	70%
Misc Campaign	\$300	\$0	0%
Supplies	\$3,000	\$4,788	160%
Campaign Expenses	\$4,550	\$5,658	124%
Total Operating Budget	\$151,881	\$154,188	102%
5% taken from investment account	\$55,928	\$55,928	
Operating balance to come from campaign	\$95,928	\$98,260	
Administrative Overhead %		24%	

**Investment Account - Statement of Financial Condition (January 1, 2016-
December 31, 2016)**

Beginning Market Value	\$1,059,469.75
Additions	\$59,096.18
Distributions	(\$75,088.86)
Income	\$32,651.12
Non-Cash Asset Changes	\$11,530.29
Change in Market Value	\$72,293.06

Ending Market Value **\$1,159,951.54**

Realized Gains/Losses
(included in total above) \$12,270.82

Asset Allocation Summary

58% Equity	\$671,031.90
39% Fixed Income	\$458,123.64
3% Cash and Equivalents	\$30,796.00

100% Total Assets Value \$1,159,951.54

Red Feather Society Leadership Giving Circle

\$500-\$999

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Laral Management
Robert & Linda Marshman
Robert and Rosemarie Tenney
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\$10,000+

Olin Miller

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