



**THANK YOU  
FOR OPENING  
YOUR HEARTS  
AND CHANGING LIVES  
LIVE UNITED**

**Roane County United Way  
Annual Report 2013**



# Our Mission

To mobilize the caring power of our community

- To create long-lasting change that improves people's lives, and
- To provide for the basic human needs of those needing assistance

**GIVE. ADVOCATE. VOLUNTEER.**  
**LIVE UNITED**



## A Message from Our Board Chair . . . Susan Howell

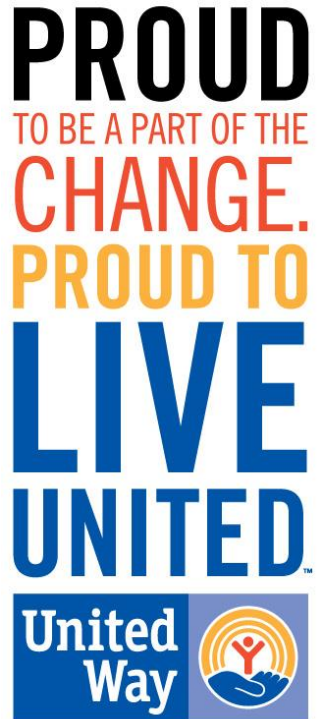
*“It has been my honor to serve as Chair of the Board of Directors this past year, and to have the opportunity to see our RCUW partner agencies and supporters working tirelessly to meet the needs of our community and to create long-lasting change in Roane County. Thank you, Roane County, for your generosity - together we are making a difference!”*

- Susan Howell. 2013-2014 RCUW Chair

**OUR DONORS** Despite difficult economic times, our donors contributed over \$380,000 to our 2014 campaign! These funds plus the time of many volunteers allows RCUW to support 32 agencies and 40 social services programs that provide assistance to thousands of Roane County residents in need. In 2014, we hope to extend our outreach through new partnerships and funding opportunities.

**OUR VOLUNTEERS** From the start of the year to the end, RCUW is reliant on the dedication of volunteers. At tax time VITA volunteers take the time to assist taxpayers with returns and financial counseling. Each fall, volunteers assist with our annual campaign to assure funding for community investment. In 2015, the community investment process will move to February, as volunteer panels review agency applications for the next funding year.

**OUR AGENCIES** We are so fortunate to have a network of service providers, who care for the well-being of our citizens. Whether working with children, the elderly, or families in crisis—the agencies we fund are on the front lines, serving the needs of Roane County.



## A Message from our Executive Director. . . Amy C. Harmon



It is hard to believe that yet another year has passed! On a personal note, my 2013 began with the birth of our first child, Elise Catherine Harmon. Our daughter has been a blessing to my husband and I, and I am grateful to the RCUW staff, Board members, and volunteers that assisted while I was on maternity leave.

Despite the challenges associated with the economic climate, I am proud of the accomplishments our United Way and RCUW family has made in 2013. As projected in last year's report, the Roane County Volunteer Clearinghouse has been a huge success. With over 6,000 views, our citizens are learning more about the volunteer opportunities and in-kind needs of Roane County. To learn more, please visit [www.unitedwayroane.org](http://www.unitedwayroane.org) and click the VOLUNTEER button.

I am also incredibly proud of the 32 RCUW partners that delivered service to 30,000+ Roane Countians in 2013 in the areas of EDUCATION, HEALTH, and SELF-SUFFICIENCY.

The above gives just a glimpse into the work accomplished in 2013—I have not even mentioned Emergency Food & Shelter effort or the Education Involvement Initiative. To sum it all up, our staff, volunteers, and community partners are passionate about creating lasting change. Together, we can help our community strive towards a brighter future!

United Way improves lives by mobilizing the caring power of our community to advance the common good.

- **Give** from your heart.
- **Advocate** to increase understanding of our community's needs and how we can come together to address them.
- **Volunteer** to help your neighbors.

## Roane County United Way 2013-2014 Community Investments

<b>Agency</b>	<b>2013</b>
American Red Cross	\$ 4,140
Boy Scouts	\$ 8,910
Boys & Girls Club	0
CASA of the Ninth Judicial District	\$ 13,500
Catholic Charities (Pathways)	\$ 4,500
Child Advocacy Center	\$ 2,511
Children's Fund	\$ 2,723
Clinch River Home Health	\$ 2,430
Contact Helpline	\$ 2,250
Council on Aging (MECAA)	\$ 3,600
East TN Information & Referral 211	\$ 810
East TN Kidney Foundation	\$ 4,500
Education Involvement Initiative	\$ 5,285
Epilepsy Foundation of East TN	\$ 900
4H Volunteers	\$ 5,760
FISH of Roane County (MECAA)	\$ 0
Florence Crittenton Agency	\$ 2,250
Girl Scouts	\$ 3,317*
Helen Ross McNabb	\$ 8,550
Imagination Library	\$ 5,850
Literacy Council	\$ 3,600
Michael Dunn Center	\$ 66,150
Ridgeview Psychiatric Hospital	\$ 6,750
Roane County Anti-Drug Coalition	\$ 8,000
Roane County Cooperative Ministries	\$ 2,250
Roane County Health Council	\$ 16,740
Roane County Rescue Squad	\$ 48,299*
Roane Co. Youth Athletic Association	\$ 4,950
Sexual Assault Center of East TN	\$ 1,800
Salvation Army	\$ 11,145
Second Harvest	\$ 5,400
Self Sufficiency Program (MECAA)	\$ 3,420
Senior Citizens Home Assistance	\$ 2,790
Senior Nutrition Program (MECAA)	\$ 21,060
tnAchieves	\$ 0
Volunteer Income Tax Assistance	\$ 23,897
Volunteer Fire Dept East Roane Co.	\$ 7,560
Volunteer Fire Dept West Roane Co.	\$ 9,900
Volunteer Fire Dept South Roane Co.	\$ 0
United Way Programs	\$ 47,997
<b>Total Community Investment</b>	<b>\$321,878</b>

# ROANE COUNTY UNITED WAY 2013-2014 BOARD OF DIRECTORS

Susan Howell, Chair	Jody Easter
Bill Rhyne, Vice Chair	Gina Ford
Jennifer Trentham*, Treasurer	Sharon Kohler
John Leitnaker^, Secretary	MaryAnn Owings^
Pat Baldwin*, Governance Chair	Dana Peterka
Debbie Sumner+, Community Investment Chair	Toby Russell^
Jeff Alcorn	Deb Schenk
Connie Aytes	Melissa Smith
Juanita Blasingame	

\* Denotes board member initiating 1<sup>st</sup> term due to instatement for mid-year vacancy

+ Denotes board member renewing for 2<sup>nd</sup> term

^ Denotes outgoing board member

## Incoming Officers for 2014-15

Board Chair..... Bill Rhyne  
 Vice Chair..... Jeff Alcorn  
 Treasurer..... Jennifer Trentham  
 Secretary..... Jody Easter

## Nominations for 2014-15 Board of Directors

Jim Doyle..... RSCC Retiree  
 Scott Mason..... Roane Co Schools  
 Jason Proffitt..... B&W Y-12

**Roane County United Way**  
**Statement of Activities and Change in Net Assets**  
For the years ended December 31, 2013 and 2012

	<b>DECEMBER 31, 2013</b>	<b>DECEMBER 31, 2012</b>
<b>UNRESTRICTED NET ASSETS</b>		
<b>Unrestricted Revenues and Other Support</b>		
Campaign Applicable to Current Period	\$ 362,167	\$ 359,256
Campaign Applicable to Prior Period	53,531	82,989
Miscellaneous Gifts and Donations	12,861	40,108
Grants	15,199	27,763
Less: Amounts Designated by Donor	(5,810)	(27,375)
Less: Provisions for Uncollectible Pledges	(11,906)	(17,134)
<b>Total Unrestricted Revenues and Other Support</b>	<b>\$ 426,042</b>	<b>\$ 465,607</b>
<b>Unrestricted Other Revenue</b>		
Interest and Dividend Income	\$ 65	\$ 617
Unrealized Gain (Loss) on Investments	922	945
In-kind Contributions	2,267	3,005
Miscellaneous	0	3,842
<b>Total Unrestricted Other Revenue</b>	<b>\$ 3,254</b>	<b>\$ 8,409</b>
<b>Total Unrestricted Revenue and Other Revenue</b>	<b>\$ 429,296</b>	<b>\$ 474,016</b>
<b>Allocations and Expenses</b>		
<b>Program Services</b>		
Gross Funds Awarded/Distributed	\$ 242,041	\$ 332,003
All Other Programs	66,302	64,652
<b>Total Program Services</b>	<b>\$ 308,343</b>	<b>\$ 396,655</b>
<b>Support Services</b>		
Campaign	\$ 7,962	\$ 20,951
Management & General	45,935	47,857
United Way of America Dues	4,207	4,876
<b>Total Support Services</b>	<b>\$ 58,104</b>	<b>\$ 73,684</b>
<b>Total Program and Support Services</b>	<b>\$ 366,447</b>	<b>\$ 470,339</b>
<b>CHANGE IN UNRESTRICTED NET ASSETS</b>	<b>\$ 62,849</b>	<b>\$ 3,677</b>
<b>NET ASSETS BEGINNING OF YEAR</b>	<b>\$ 259,704</b>	<b>\$ 256,027</b>
<b>NET ASSETS AT END OF YEAR</b>	<b>\$ 322,553</b>	<b>\$ 259,704</b>

\*\*These figures are DRAFT pending final review of audit

# 2013/14 Roane County United Way Campaign Recognitions

**COMMUNITY PILLARS** – Corporate gifts of \$5000+ and employee campaigns that totaled \$10,000+

B&W Y-12  
Pro2Serve

UCOR  
UT Battelle

**COMMUNITY LEADERS** – Corporate gifts of \$1000-\$4999 and/or employee campaigns that totaled \$3600 - \$9999

Corporate Gifts - Regions Bank, US Bank, Walmart Foundation

Employee Campaigns -

CFC Smoky Mountain  
Covenant

ORAU  
Roane County Schools

**COMMUNITY BUILDERS** – Corporate Gifts of \$500-\$1000 and/or employee campaigns totaling \$500 - \$3599

Employee Campaigns –

AT&T  
Bechtel National  
CFC Chattanooga  
Citizens National Bank  
Enrichment Federal Credit Union  
First Bank of Tennessee  
Kimberly-Clark  
Kroger  
Methodist Medical Center  
Michael Dunn Center  
Oak Ridge Associated Universities  
ORNL Federal Credit Union  
Patterson's Appliances  
Regions Bank

Roane Alliance  
Roane County Government  
Roane State Community College  
SCHAS  
Tate & Lyle  
Thermo Fisher  
TN College of Applied Technology  
TN Employee Charitable Camp.  
UPS  
URS Energy & Construction  
URS-WSMS  
US Bank  
USEC

**COMMUNITY CONTRIBUTORS**- Corporate gifts or employee campaigns that totaled \$250 - \$499

AGA Insurance  
American Centrifuge Manufacturing  
Ametek

Griffin Insurance  
Ridgeview



# VOLUNTEERS

United Way relies heavily on volunteers to accomplish our mission. Volunteers help to keep our administration costs low. They are the backbone of the work that we do.

The Roane County United Way would like to thank the following who contributed to the success of this year's activities.

## Campaign

**Company Campaign Facilitators** – To all our site leads at each company and company liaisons, thank you so much for the time and effort you've dedicated to help us work towards our goal!

**Campaign Thermometers**... The Michael Dunn Center

## 2013-2014 Community Investment Panels

Traditionally, the Community Investment Committee fulfills two purposes. The first is to effectively and responsibly distribute the dollars that are raised in the annual campaign. The second is the education of community volunteers to the services United Way agencies provide and the specific financial needs of those agencies.

It takes many volunteer hours to review agency applications, meet with agencies and then finally make recommendations for funding. A VERY SPECIAL thank you to **Debbie Sumner, our Community Investment Chair!** We also thank the following individuals for their participation in this very important process.

V  
O  
L  
U  
N  
T  
E  
E  
R



## Community Investment Panels included

**Community Care :** MaryAnn Owings (Chair), Ed Bilbrey, Dana Peterka, Kathy Cole

**Crisis:** Regina Ford (Chair), Elaine Patterson, Chad Goldston, Billie Goldston

**Education:** Sharon Kohler (Chair), Debbie Jenkins, Jill Christian, Kim Jeskie, Ernie Ford

**Emergency:** Missie Smith (Chair), Jennifer Trentham, Lindsay Smith, Chastity Smith, Jennifer Fisher

**Health Care:** Deb Schenk (Chair), Jeff Alcorn, Bobby Davis, Brittany Catron

**Youth Services:** Bill Rhyne (Chair), Pat Baldwin, Jim Stout, Marie Rorvik, Suzanne Horsfall

## Event Sponsors

We would like to recognize the following companies for contributing above and beyond their regular corporate gifts to help offset our campaign and event costs.

Event Sponsors- Citizens National Bank, First Bank of Rockwood, , Harriman Utility Board, Knoxville TVA Employees Credit Union, ORNL Federal Credit Union, PermaFix Environmental Services, Rockwood Electric Utility, Roane Medical Center, UT-Battle ORNL, Whitestone Country Inn

Refreshment Donation- Cheers of Kingston, Laura's Liquor Store, Anonymous

Event In-Kind/Volunteers – Michael Dunn Center, Kid's Café volunteers, Roane Medical Center

Communications- Debbie Alexander-Davis, Roane County News, Kim Kruse (website)

# VITA: Volunteer Income Tax Assistance Program

Tax Year 2012

## Roane County United Way VITA Site –

Dana Peterka, Site Coordinator	Vickie Smith
Dirk Van Hoesen, Coordinator	Paulette Lawson
Elect	Regions Bank (Harriman, Kingston, Oliver Springs, Rockwood)
Marie Anderson	US Bank (Kingston, Rockwood)
Jack McNew	
Joan Higgins	
Jennifer Trentham	

## Luminary United Methodist Church Site -

Joanne & Robert Moritz – Site Coordinators

The Roane County Volunteer Income Tax Assistance Program began in 2005. We are proud to report our total end 2013 as follows:

Total Returns prepared	2,596
Total Refund Amount	\$2,703,685
Total Earned Income Tax Credit	\$ 896,937

**Project Freedom  
Programs/ Partners–**



- VITA (Walmart Foundation, VITA Grant, IRS)
- Self Improvement Books Program (Harriman, Rockwood, Kingston Public Libraries)

The Roane County United Way is a not-for-profit organization exempt from income tax under section 501c(3) of the Internal Revenue Code and provides supporting services and other assistance to public and private agencies and community organizations to meet the human service needs of the general public of Roane County. RCUW is a local autonomous organization governed by a local board of directors and operates under a charitable solicitation permit issued by the State of Tennessee.

RCUW pays annual dues of 0.138% to United Ways of Tennessee and 1% to United Way Worldwide. RCUW's cost to cover fundraising and year-round administration costs is 15% of the total amount pledged to RCUW.



**Roane County  
United Way**

PO Box 317. 2735 Roane State Hwy.  
Harriman, TN 37748  
P: 865.882.7711. F: 865.882.9899  
[www.unitedwayroane.org](http://www.unitedwayroane.org)