“A pandemic is a widespread disease.

It can only be fought with equally widespread responsibility and generosity...

...that is the soul of Addison County.”

- Addison County Responds Donor, March 2020
# Table of Contents

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>A YEAR LIKE NO OTHER</td>
<td>3</td>
</tr>
<tr>
<td>BOARD OF DIRECTORS</td>
<td>4</td>
</tr>
<tr>
<td>COMMUNITY IMPACT FUNDING</td>
<td>5</td>
</tr>
<tr>
<td>ADDISON COUNTY RESPONDS</td>
<td>9</td>
</tr>
<tr>
<td>OUR PROGRAMS</td>
<td>12</td>
</tr>
<tr>
<td>FINANCIAL INFORMATION</td>
<td>18</td>
</tr>
<tr>
<td>ABOUT OUR DONORS</td>
<td>19</td>
</tr>
<tr>
<td>HOW YOU CAN HELP</td>
<td>20</td>
</tr>
<tr>
<td>OUR STAFF</td>
<td>21</td>
</tr>
</tbody>
</table>
Dear Neighbors and Friends,

In last year’s Annual Report, we presented three commitments UWAC made to Addison County as part of our new strategic plan. We promised to be always evolving and forward thinking, to lead in collaboration, and to raise awareness of and grow support for local challenges. We had no idea 2020 would require us to “prove it” quite to this extent.

Our best laid plans were upended by a global crisis that continues to acutely impact our neighbors, our economy, and our daily routines. In March we stopped shaking hands, started wearing masks, and suddenly nothing felt normal anymore. Unemployment started to skyrocket as did homelessness, hunger, isolation, and anxiety. The pandemic undoubtedly presented a new challenge for us - but we proved we were up for it. UWAC was built for this.

In the pages that follow, you’ll read about how we are helping and connecting members of the community. You’ll also read about “Addison County Responds,” our local COVID-19 relief effort. This year’s Annual Report feels like Part One of an ongoing series because this crisis isn’t over - the work didn’t end with our fiscal year. We still have a lot to do and it’s important to note that, moving forward, our goal isn’t to return to “normal.” Normal wasn’t working for too many people in Addison County. Instead we have our eyes set on re-imagining and rebuilding a more equitable and resilient community. To accomplish this, we need your continued support and partnership.

On behalf of the board, staff, and people we serve - thank you. UWAC will continue to be by your side as Addison County rebuilds in this “new normal”. Please don’t hesitate to reach out to us for more information or questions.

With gratitude,

Helena D. Van Voorst
Executive Director
Dear Friends and Partners,

To say that the past year has been a challenge is an understatement. Nearly every aspect of our lives were affected by the pandemic, and I know many of us are still having sleepless nights, wondering what the future holds in these strange times.

Back in March, while our county was grappling with the thought of schools and businesses closing, the staff at United Way of Addison County was quickly assessing the situation and preparing to do their part. We made swift adjustments to our Community Impact Funding (CIF), United@Work program, and our substance prevention in-classroom program in area schools. Addison County Responds was launched, and the response was overwhelming. Loyal donors and new donors alike stepped up to help support our community partners on the front lines of the pandemic. We had individuals offer matching challenges, and it was exceeded not once - but twice. We were reminded how special it is to live in Addison County.

I am extremely proud of our nimble staff, led by Executive Director Helena Van Voorst, and their ability to be a resource to our funded partners. The joke around the UWAC office has been, “this is our first pandemic,” yet somehow, our impressive funded partners knew when and how to react to the needs that were arising daily. While their expertise had them poised to respond, we know this has not been easy for our nonprofits. We know there are more challenges ahead. But we also know that Addison County neighbors can lean on each other when times get tough.

I thank you for your support of UWAC for the past year, and am glad we have you in our corner to continue to face these challenges together, as a community.

With thanks and appreciation,

Jerrod Rushton
Board President
Community Impact Funding

In January 2020, we released a request for proposals for programs working to improve Education outcomes in Addison County. We also began training a team of 27 community volunteers to help us review and score the 19 applications we received. With $94,953 available for distribution and $268,065.92 in requests, our reviewers were prepared to carefully consider how best to invest the community’s philanthropic support back into the county.

In mid-March, UWAC’s Board of Directors voted to not consider new applications for support in the middle of the review process. This difficult decision was made with the intent to help the organizations we’ve been investing in for many years stabilize/recover from the pandemic. The Board also voted to unrestrict funding to all of our funded partners so UWAC funds could be used however they were most needed during this time of crisis.

“The CIF process is all about volunteers from the community getting together to ‘do the right thing.’ In past years, that has meant detailed reading and discussions of grant requests followed by site visits to these current and prospective partners. Additional discussions were then held in order to better understand how these agencies plan to benefit the community, and how successful they have been in delivering past results. The final culmination of this lengthy volunteer commitment was the highly thought-out allocation of United Way donations, aimed at delivering maximum benefits to Addison County. In 2020, however, the health and safety of partner agency staff, United Way staff, and CIF volunteers took top priority. We employed a more flexible approach without the usual group meetings and site visits and elected to fund our existing partners at similar levels to the grant cycle that just ended. We look forward to getting back to the fully engaged CIF process when it is safe to do so.”

- Bruce Grove, UWAC Board Member
$331,368 Invested in Three Areas:

### HEALTH: $115,329
- Addison County Home Health & Hospice: $5,000
- Addison Allies Network: $8,000
- Age Well: $10,680
- Elderly Services: $11,678
- End of Life Services: $11,200
- Green Mountain Foster Bikes: $1,500
- John Graham Housing & Services: $12,771
- Junebug: $1,500
- Lund: $2,000
- MiddSummer Lunch & Recreation: $3,000
- Open Door Clinic: $21,000
- Pathways Vermont: $3,000
- Turning Point Center: $4,000
- WomenSafe: $20,000

### EDUCATION: $94,953
- Addison Central Teens: $3,975
- Addison County Parent Child Center: $9,792
- Addison County Readers: $2,017
- Boys & Girls Club of Greater Vergennes: $13,750
- Bristol Family Center: $14,300
- Mary Johnson Children’s Center: $9,444
- Otter Creek Child Center: $14,300
- Starksboro Co-operative Preschool: $11,000
- The DREAM Program: $1,400
- The HUB Teen Center & Skatepark: $3,975
- Vermont Adult Learning: $11,000

### FINANCIAL STABILITY: $121,087
- Addison County Community Trust: $15,000
- Tri-Valley Transit (formerly Addison County Transit Resources): $21,011
- Charter House Coalition: $24,114
- Counseling Service of Addison County: $15,894
- John Graham Housing & Services: $21,844
- HOPE (Helping Overcome Poverty’s Effects): $23,224
“COVID struck us in March when we were unaware of the changes it would make. Suddenly we went from a community lunch offered every day for anyone in town who was hungry supported by church groups, and an evening meal for 35 who lived in the shelter, to a full-fledged commercial operation serving three meals a day to over 100 homeless in the Middlebury area. With only one paid kitchen employee it was imperative to hire some assistance. One of our shelter guests experiencing homelessness (who had cooked in restaurants before) was asked if he would be interested. He was.

Bob is in his mid-50’s, a former biker, a felon, the kind of guy you might be afraid of if you met him on the street. Sometimes people just need a chance.

Bob came in his first day saying it had been a long time since he had worked but he really wanted this job. Bob has come in every shift on time and does anything that is asked of him with a “yup”. His interest in baking has made him our resident dessert maker! He is saving his money and he has received a voucher for housing. Bob is on his way to a life with some measure of peace. We're glad we have been part of that.”

Submitted by Doug Sinclair
Executive Director
Charter House Coalition
“My parents began experiencing difficulties when my mother returned home after a hip replacement. My father had long been struggling with failing health including hypertension and TIA's which impacted his mobility. My mother had been managing to support much of his care until her own health changed. Addison County Home Health & Hospice came to their aid with enrollment in the Moderate Needs program. Soon they were receiving twice weekly homemaker (PCA) assistance in their home. Meal prep, light housekeeping, and laundry were the "official" tasks, for which my parents benefited (and which their children were grateful to have others take care of since we all worked and were not available during some daytime hours).

But what was of equal importance was the warm, friendly personalities of the care providers. Clearly they enjoyed interacting and caring for seniors. My father especially enjoyed the bantering and having someone listen to his life’s stories as they worked about the home. This gave my mother a break to do some quiet activities, or tend to other things, without the interruptions that my father was prone to imposing upon her. Our family had peace of mind knowing there were other "eyes" on our parents and the more challenging household chores were getting done.

Following my father’s death, we were grateful that our mother continued to be served through the Moderate Needs program with weekly homemaker services and attendance at the local adult day program. If not for these programs, I feel our family would not have been able to manage the complexities of having two parents facing serious medical issues at the same time, and one or both of them likely would not have been able to remain in the setting of their choosing; their own home."

Submitted by Maureen Conrad
Director of Development
Addison County Home Health & Hospice
On March 17, 2020, the reality of what a global pandemic meant for Addison County was still settling in. People were just getting into the habit of not shaking hands and still needed to clarify whether meetings were happening in person or via Zoom. With much regret, events around the community were being postponed and we all hoped that maybe, just maybe, they’d still happen. Local businesses were starting to feel the pinch and everyone started worrying about hours being reduced, or worse, jobs being lost. At United Way of Addison County we launched Addison County Responds, our COVID-19 emergency relief campaign, and wondered if fundraising during a pandemic was even possible.

As of June 30, 2020, this great community raised $216,591, allowing UWAC to deploy emergency grants to nonprofit partners and providing relief funds to individuals/families nearly immediately, while also providing continued funding for our partner agencies on the front lines.

$216,591 raised by 429 donors in 105 days

- 25% of funds to individuals needing support beyond existing systems
- 25% of funds to 19 local health and human service agencies
- 50% of funds to 29 nonprofit partners, most on the front lines of pandemic
Addison County Responds

Emergency Funds for Individuals/Families
Assisting in the following areas:

- **HEALTH:** $19,700
  - Addison Allies: $1,000
  - Addison County Home Health & Hospice: $6,000
  - Age Well: $3,750
  - Elderly Services: $2,000
  - End of Life Services: $1,000
  - New Community Project: $1,000
  - Open Door Clinic: $1,950
  - Pathways Vermont: $2,000
  - Womensafe: $1,000

- **EDUCATION:** $11,850
  - Addison County Parent/Child Center: $3,000
  - Boys & Girls Club of Greater Vergennes: $1,000
  - College Street Children's Center: $1,000
  - Otter Creek Child Center: $4,200
  - Starksboro Cooperative Preschool: $1,000
  - Vermont Adult Learning: $650

- **FINANCIAL STABILITY:** $11,000
  - Addison County Community Trust: $1,000
  - Charter House Coalition: $6,000
  - HOPE: $2,000
  - John Graham Housing and Services: $2,000

- **Other:** $2,000

Pie chart showing the distribution of funds:
- Housing (Rent, Mortgage, Temp. Hotel Stay): 70%
- Auto: 9%
- Utilities: 11%
- Food: 5%
- Medical: 1%
- Childcare: 1%
- Other: 2%
Prevention in Addison County

Our team of prevention experts at UWAC are committed to the future health, education, and financial stability for our youth through increasing protective factors (such as meaningful community connections), and reducing risk factors (such as reducing youth access to alcohol). When students are happy and healthy they can make informed decisions that will have positive, lasting, impacts on their future.

In the fall of 2019, United Way of Addison County was awarded 1.9 million dollars of federal prevention grant-funding (over the span of 5 years). The funding guaranteed the continuation of the substance prevention programming that UWAC has been leading since 2016. These prevention-specific grants allowed UWAC to expand their prevention staff, which contributed to the success in creating and launching a substance prevention-specific coalition known as P.E.E.P.S. (Partners Educating & Empowering Prevention for Success).

We invite you to learn more about our prevention work at: unitedwayaddisoncounty.org/substance-prevention-in-addison-county

"Identifying and filling gaps in service is core to our mission. Supporting local youth in making healthy decisions as it relates to preventing substance use is one such gap. We know that if we can reduce youth substance use, we’ll improve the health, education, and financial stability of Addison County over time and we are pleased to be doing this work with and across many different sectors of our community."

- Helena Van Voorst
How We’re Helping

Days of Caring

2 Days of Extreme Volunteerism
349 Volunteers Helping
30 Nonprofits

$23,732 Estimated savings in labor costs

Stuff the Bus

382 Backpacks Distributed
16 Distribution sites
77 Donors that gave $5,127

MyFreeTaxes

108 Returns Filed

$29,484 Saved in tax preparation fees

$133,403 In refunds back to Addison County residents

United@Work

$51,793 In emergency funds provided to individuals through Addison County Responds

79 Individuals assisted during the pandemic
Nonprofit Resource Hub

At the heart of the mission of United Way of Addison County is to ensure our local nonprofits are strong, healthy, and prepared to accomplish great things. We are proud to be the nonprofit resource hub in Addison County, and when social distancing is a thing of the past, we welcome our partners and fellow nonprofits to our location to collaborate.

Nonprofit Seminar Series

In partnership with Addison County Chamber of Commerce and nonprofit consultant Sarah Audet, we offered free seminars for nonprofits with topics that ranged from grant writing and fundraising, to recovering from the pandemic. We believe we’re stronger together when we learn from one another.

Operational Support

We love receiving questions from nonprofits! This year we helped 14 fellow nonprofits (whether they were a funded partner or not) navigate an array of topics such as board development, fundraising, volunteer recruitment, and even keynote speaking at annual meetings!

Technology & Social Media Support

The pandemic has put many of us into unfamiliar territory when it comes to technology! We hosted a “Basics of Zoom” seminar in mid-March and have helped several partners as they’ve ramped up their social media accounts to stay connected in social distant times.
Emerging Leaders of Addison County (ELAC)

UWAC is working to identify, develop and empower the next generation of philanthropic leaders through community service, leadership development, and fun networking opportunities through our ELAC group. Launched in the Fall of 2019 in partnership with Addison County Chamber of Commerce, this group has grown to 14 members who have engaged in monthly “Lunch & Learns”, an interactive way to learn about local nonprofits.

“...I would have never experienced these organizations if it wasn’t for the Lunch & Learn events. It broadens my awareness of the service providers in Addison County and how great this community is.”
- Tom Fagan, ELAC member
The Addison County 365 Small Business Circle provides busy entrepreneurs, business owners, and managers an opportunity to sponsor important, high-visibility events, and make a significant impact on the lives of people in your community – with just one gift. Levels range from $365 ($1/day) to $1,460 ($4/day) so businesses can choose the package that works best for them.

Thank you to our 2019-2020 members!

Champlain Valley Properties
Fire & Ice
Forth ‘N Goal
Lincoln Peak Vineyard
Middlebury Inn
Rosie’s Restaurant
Smart Move Storage
Stonewell Properties
The Vermont Book Shop
# Financial Highlights

**United Way of Addison County**  
*Statement of Financial Position*  
Fiscal Years Ending 6/30/2019 and 6/30/2018  
(fully audited)

<table>
<thead>
<tr>
<th></th>
<th>6/30/19</th>
<th>6/30/18</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Assets</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Current Assets</td>
<td>$290,297</td>
<td>$462,845</td>
</tr>
<tr>
<td>Net &amp; Property &amp; Equipment</td>
<td>208,839</td>
<td>201,796</td>
</tr>
<tr>
<td>Other Assets</td>
<td>1,303,428</td>
<td>1,236,067</td>
</tr>
<tr>
<td><strong>Total Assets</strong></td>
<td>$1,802,564</td>
<td>$1,200,708</td>
</tr>
<tr>
<td><strong>Liabilities</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Current Liabilities</td>
<td>243,638</td>
<td>260,143</td>
</tr>
<tr>
<td>Long-Term Debt</td>
<td>152,453</td>
<td>155,079</td>
</tr>
<tr>
<td><strong>Equity Assets:</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Net Assets Without Donor Restrictions</td>
<td>915,991</td>
<td>999,882</td>
</tr>
<tr>
<td>Net Assets With Donor Restrictions</td>
<td>490,482</td>
<td>485,604</td>
</tr>
<tr>
<td><strong>Total Net Assets</strong></td>
<td>$1,406,473</td>
<td>$1,485,486</td>
</tr>
<tr>
<td><strong>Total Liabilities &amp; Net Assets</strong></td>
<td>$1,802,564</td>
<td>$1,200,708</td>
</tr>
</tbody>
</table>

*(Equity assets presented post-FASB ASU No. 2016-14)*

---

**United Way of Addison County**  
*Statement of Activities*  
Fiscal Years Ending 6/30/2019 and 6/30/2018  
(fully audited)

<table>
<thead>
<tr>
<th></th>
<th>6/30/19</th>
<th>6/30/18</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Public Support and Revenue</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Gross Campaign Results</td>
<td>$615,044</td>
<td>$665,336</td>
</tr>
<tr>
<td>Donor designations—others</td>
<td>(23,482)</td>
<td>(54,575)</td>
</tr>
<tr>
<td>Donor designations—partners</td>
<td>(35,602)</td>
<td>(29,661)</td>
</tr>
<tr>
<td>Amounts from other United Ways</td>
<td>(19,723)</td>
<td>(33,819)</td>
</tr>
<tr>
<td>Amounts raised from events</td>
<td>(12,711)</td>
<td>(29,695)</td>
</tr>
<tr>
<td>Provision for uncollectible pledges</td>
<td>(27,696)</td>
<td>(29,700)</td>
</tr>
<tr>
<td>Net Campaign Results</td>
<td>495,810</td>
<td>487,886</td>
</tr>
<tr>
<td>Event revenue (including non-campaign)</td>
<td>14,661</td>
<td>33,645</td>
</tr>
<tr>
<td>Contributions designated UWAC</td>
<td>41,335</td>
<td>141,297</td>
</tr>
<tr>
<td>Grants</td>
<td>551,354</td>
<td>569,527</td>
</tr>
<tr>
<td>In-kind contributions</td>
<td>12,805</td>
<td>34,327</td>
</tr>
<tr>
<td>Recovery of prior year writeoffs</td>
<td>16,316</td>
<td>745</td>
</tr>
<tr>
<td>Program revenue</td>
<td>46,602</td>
<td>42,630</td>
</tr>
<tr>
<td><strong>Investment income</strong></td>
<td>78,355</td>
<td>39,068</td>
</tr>
<tr>
<td><strong>Change in beneficial interest</strong></td>
<td>4,938</td>
<td>12,998</td>
</tr>
<tr>
<td>Other income</td>
<td>5,643</td>
<td>10,525</td>
</tr>
<tr>
<td><strong>Total Public Support and Revenue</strong></td>
<td>$1,267,880</td>
<td>$1,172,648</td>
</tr>
<tr>
<td><strong>Excluding Investment Income</strong></td>
<td>$1,184,586</td>
<td>$1,320,582</td>
</tr>
</tbody>
</table>

**Expenses**

- Program services:  
  - Funding & agency relations | 314,684 | 333,737  
  - Organizational development | 377,815 | 382,366  
  - Community leadership & initiatives | 351,077 | 278,559  
- Volunteer programs | 56,396   | 52,550   |
- Total Program Services | 1,099,972 | 1,047,212 |
- Support services:  
  - General and administrative | 114,026 | 79,044   
  - Fundraising | 132,895 | 149,633  
- Total Support Services | 246,921 | 228,677  |
| **Total Expenses** | 1,346,893 | 1,275,289 |
| **Total Change in Net Assets** | (79,013) | 97,359 |
| **Beginning Net Assets** | $1,485,486 | $1,388,127 |
| **Ending Net Assets** | $1,406,473 | $1,485,486 |

*The following are the annual changes in net assets excluding changes in investments:  
FY 2019: (162,307)  
FY 2018: 45,293*
About Our Donors

Number of Donors by Giving Amount
- Tocqueville ($10,000+)
- Robert Frost ($1,250 - $9,999)
- Leadership ($1,000 - $1,249)
- Under $1,000

969 donors in total:
- 9 Tocqueville donors
- 116 Robert Frost donors
- 40 Leadership donors
- 924 Under $1,000 donors

2019-20 By the Numbers
- Campaign Goal: $635,000
- Campaign Dollars Raised: $759,536
- New Donors: 238
- Average Gift: $50
- Donor Retention Rate: 70%

Total Number of Donors by City/Town:
- Bridport
- Bristol
- Cornwall
- Ferrisburgh
- Lincoln
- Middlebury
- New Haven
- Salisbury
- Vergennes
- Weybridge
- All Other AC Towns
- Outside AC/Unknown
- Anonymous
How You Can Help

Give

Monthly gifts, planned gifts, one-time donations, gifts of stock. Gifts of every size and type help change lives and make Addison County stronger! Join our 365 Small Business Circle or Emerging Leaders of Addison County.

unitedwayaddisoncounty.org/give

Advocate

Policy change can be big or small and you can play a role, regardless of age or circumstance. Advocating can mean anything from petitioning politicians to mobilizing friends and family to fight for a critical cause.

unitedwayaddisoncounty.org/advocate

Volunteer

We’re your one-stop-shop for volunteering! Whether you’re an individual who wants to offer your time and expertise or you’re a nonprofit in need of help, we can help you find a customized solution!

unitedwayaddisoncounty.org/volunteer
The UWAC Team

Helena D. Van Voorst
Executive Director

Erin Reed
Development & Marketing Director

Steve Williams
Director of Finance

Jesse Brooks
Director of Prevention

Linnea Oosterman
Volunteer & Outreach Coordinator

Lee Bilson
Office Manager

Trish Lafayette
United@Work Coordinator

Tim O’Toole
Prevention Coordinator

Jessica Hellyer
Grants Coordinator

Olivia Brooks
Youth Prevention Coordinator

Sean Davison
Youth Prevention Coordinator
“This is my county. These are my people. This is my home.
I want to help in any way that I can.”

- Addison County Responds Donor, March 2020