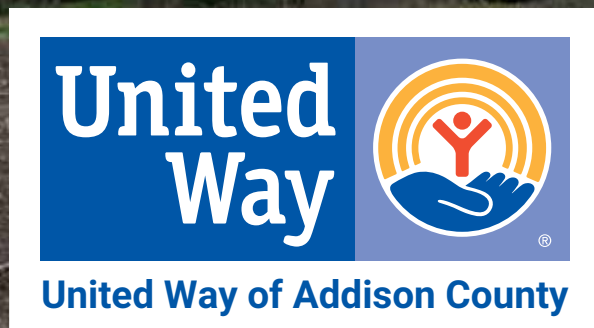


Annual Report 2019-2020





"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

A YEAR LIKE NO OTHER	3
BOARD OF DIRECTORS	4
COMMUNITY IMPACT FUNDING	5
ADDISON COUNTY RESPONDS	9
OUR PROGRAMS	12
FINANCIAL INFORMATION	18
ABOUT OUR DONORS	19
HOW YOU CAN HELP	20
OUR STAFF	21



A Year Like No Other

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



April 2020: Helena delivered 600 N95 masks to UWAC funded partners

Board of Directors

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



Jerrod Rushton, Board President

UWAC Board of Directors

Jerrod Rushton, President
Abby Blum, Vice President
Darcy Tarte, Treasurer
Nial Rele, Secretary
Bruce Bayliss
Ann Crumb
Bruce Grove
Shannon Lyford
Logan Price
Ken Stockman
Barbara Stratton

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

A Second Chance

"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



Button Bay - Ferrisburgh

Peace of Mind

"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



Middlebury Falls

Addison County Responds



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

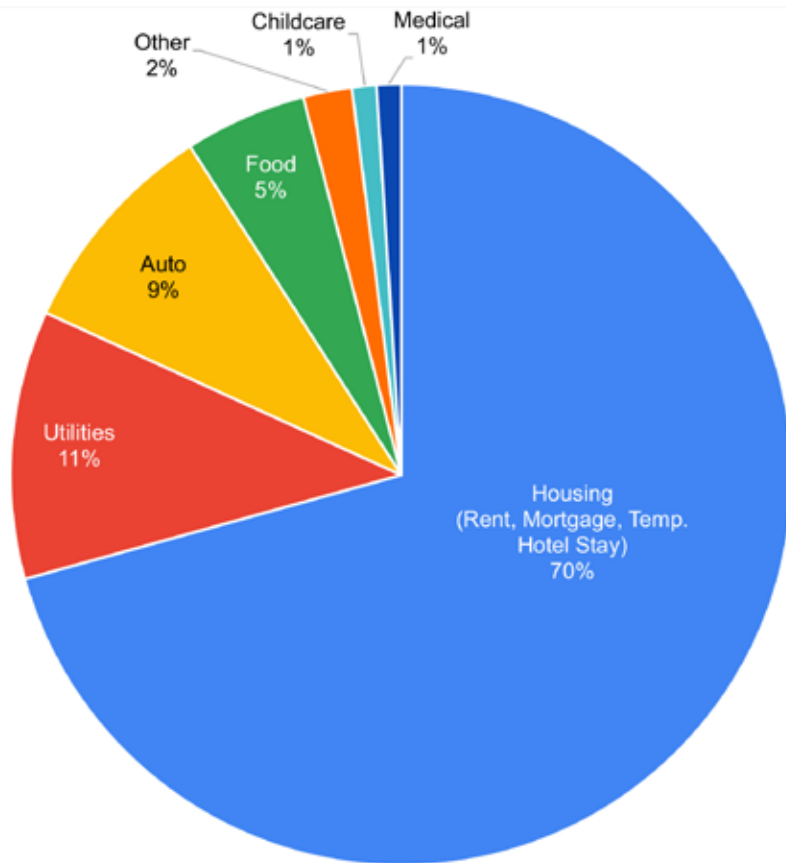
25%
of funds to
individuals needing
support beyond
existing systems

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:



Emergency Grants for Nonprofit Partners

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



Downtown Middlebury

Prevention in Addison County

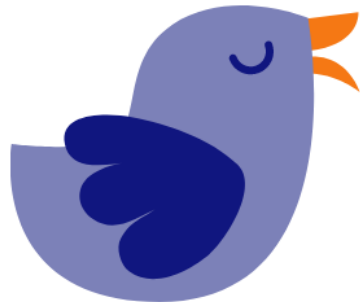


Our team of prevention experts at UWAC are committed to the future health, education, and financial stability for our youth through increasing protective factors (such as meaningful community connections), and reducing risk factors (such as reducing youth access to alcohol). When students are happy and 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

P.E.E.P.S.



**Partners
Educating and
Empowering
Prevention for
Success**

"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.

September 2019
Working with
Boards

March 2020
Recruit, Engage,
Retain, Reflect

December 2019
Grant-Writing 101

June 2020
What's Next
Nonprofits?



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.

Lunch & Learns

December 2019

WomenSafe
Kerri Duquette-Hoffman

January 2020

John Graham Housing & Services
Peter Kellerman

February 2020

Counseling Services of Addison
County
Rachel Cummings

April 2020

Addison County Community Trust
Elise Shanbacker

May 2020

Elderly Services
Kristin Bolton

June 2020

Addison County Parent/Child
Center
Donna Bailey



"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

365 Small Business Circle



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





Staff and Students at Mary Johnson Children's Center

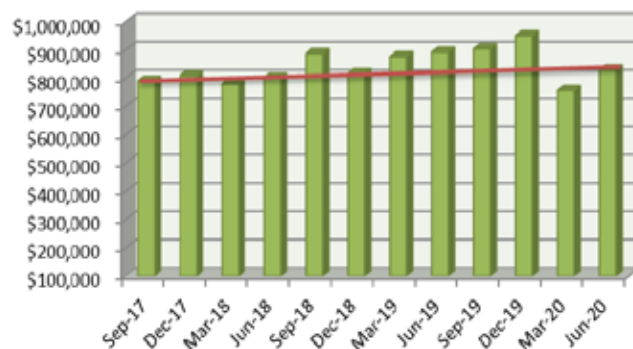
Financial Highlights

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

	6/30/19	6/30/18
Assets		
Current Assets	\$290,297	\$462,845
Net & Property & Equipment	208,839	201,796
Other Assets	1,303,428	1,236,067
Total Assets	\$1,802,564	\$1,900,708
Liabilities		
Current Liabilities	243,638	260,143
Long-Term Debt	152,453	155,079
*Equity Assets:		
Net Assets Without Donor Restrictions	915,991	999,882
Net Assets With Donor Restrictions	<u>490,482</u>	<u>485,604</u>
Total Net Assets	1,406,473	1,485,486
Total Liabilities & Net Assets	<u>\$1,802,564</u>	<u>\$1,900,708</u>

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

UWAC Endowment Funds



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

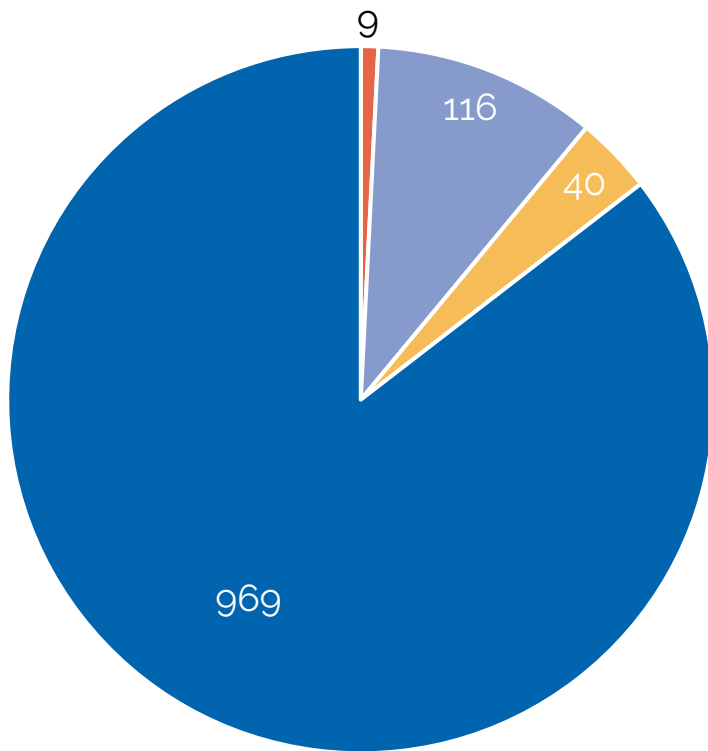
	6/30/19	6/30/18
Public Support and Revenue		
Gross Campaign Results	\$615,044	\$665,336
Donor designations--others	(23,482)	(54,575)
Donor designations--partners	(35,602)	(29,661)
Amounts from other United Ways	(19,723)	(33,819)
Amounts raised from events	(12,711)	(29,695)
Provision for uncollectible pledges	(27,696)	(29,700)
Net Campaign Results	495,830	487,886
Event revenue (including non-campaign)	14,661	33,645
Contributions designated UWAC	41,335	141,297
Grants	551,394	569,527
In-kind contributions	12,805	34,327
Recovery of prior year writeoffs	16,316	745
Program revenue	46,602	42,630
Investment income	78,356	39,068
Change in beneficial interest	4,938	12,998
Other income	5,643	10,525
Total Public Support and Revenue	\$1,267,880	\$1,372,648
Excluding Investment Income	\$1,184,586	\$1,320,582
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	149,033
Total Support Services	246,921	228,077
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

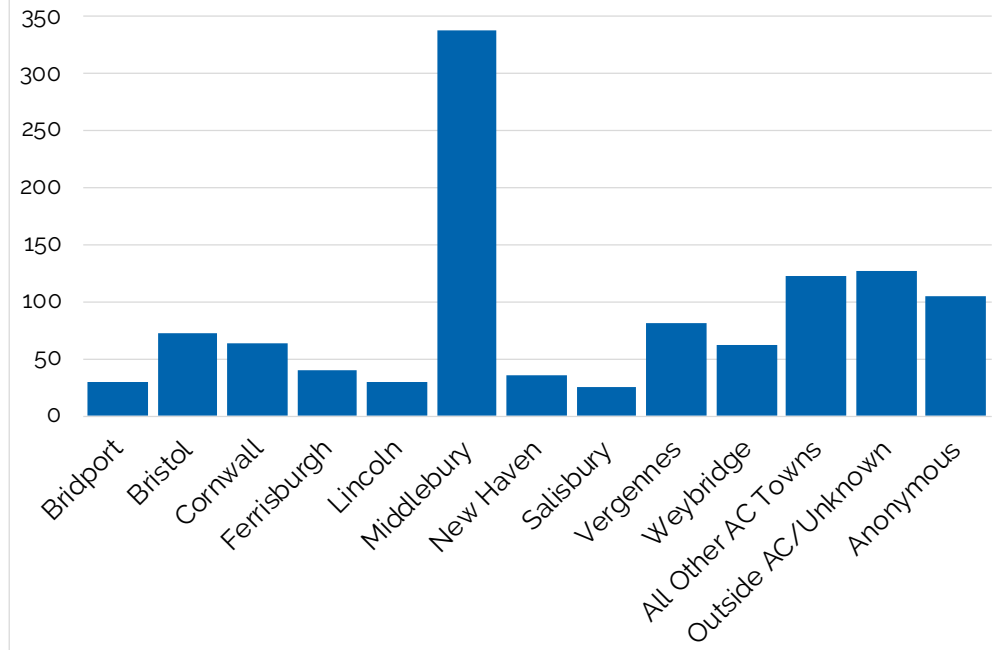
About Our Donors

Number of Donors by Giving Amount

- Tocqueville (\$10,000 +)
- Robert Frost (\$1,250 - \$9,999)
- Leadership (\$1,000 - \$1,249)
- Under \$1,000



Total Number of Donors by City/Town



2019-20 By the Numbers

Campaign Goal: **\$635,000**

Campaign Dollars Raised: **\$759,536**

New Donors: **238**

Average Gift: **\$50**

Donor Retention Rate: **70%**

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



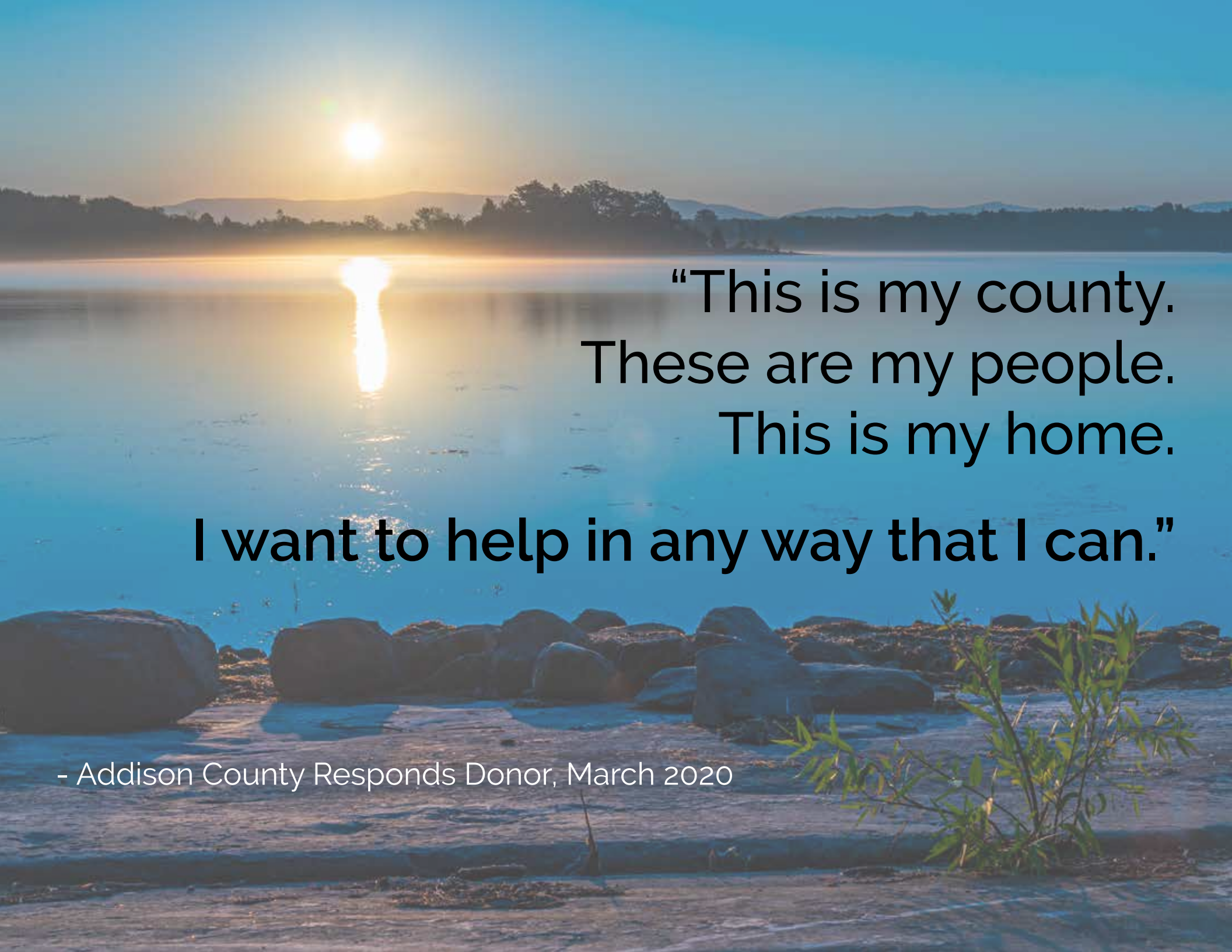
Jessica Hellyer
Grants Coordinator



Olivia Brooks
Youth Prevention
Coordinator



Sean Davison
Youth Prevention
Coordinator

A scenic landscape of a lake at sunset. The sun is low on the horizon, creating a bright reflection on the water. The sky is a mix of orange and blue. In the foreground, there are large, dark rocks and some green plants. In the background, there are mountains and a line of trees.

**“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

**United
Way**




United Way of Addison County

175 Wilson Road, Suite 101
Middlebury, VT 05753

Tel: (802) 388-7189

unitedwayaddisoncounty.org

 [@unitedwayaddisoncounty](https://www.facebook.com/unitedwayaddisoncounty)

 [@unitedway_addisoncounty](https://www.instagram.com/unitedway_addisoncounty)