2016 ANNUAL REPORT

Helping People Right Here at Home

GIVE. ADVOCATE. VOLUNTEER.
United Way of Marion County
unitedwaymarion.org
As I sit down to write this note, I realize that 2016 flew by quicker than I ever imagined it would. During a period of transition for United Way, much was learned and much was accomplished. It also was a year of personal transition. I moved to a new community, my husband started a new job, my son settled into “4-year-old” preschool and I became Executive Director of this wonderful organization - United Way.

As an organization in 2016, we continued our daily work to promote quality programming, campaigning, and community investment. As an organization, almost an entirely new staff joined United Way and previous staff members moved on to new opportunities. We remodeled the office (including IT upgrades...yikes!), we took on another new state grant program (Employer Resource Network) with an amazing community partner (Marion Matters), and we merged with a third county (Crawford) that will enhance our regional presence. Half of our board of trustee members were new. The new members learned a lot from our seasoned members and together we finalized a three-year strategic plan for our organization. I could list numerous other accomplishments of your United Way, but the point is 2016 was a year of transitions, changes, and learning…. we made it!

Each one of you had a role in our success. Please know that we feel so blessed to have you as a part of this organization, this community and our lives. As I continue to reflect on 2016, I am reminded of this quote from the literary great Charles Dickens:

“Reflect upon your present blessings - of which every man has many - not on your past misfortunes, of which all men have some.”

While all of us and our communities have faced, and will continue to face challenges, those challenges pale in comparison to our many blessings. From your United Way, THANK YOU for always being a blessing to us and this generous community!

Sincerely,

Amber L. Wertman
OUR STAFF

Amber Wertman
Executive Director

Keysha Gekler
Finance Director

Cory White
Community Impact Manager

Natalie Longmeier
Community Engagement Coordinator

Josh Noblet
Crawford County

Mike Ring
Let's Read 20

Paige Bucher
Let's Read 20

Collective Impact and Collaboration program staff:
GEARUP: Kelly Garrett, Jane Arnold, and Austin King
Employer Resource Network: Jennifer Johnson
BOARD MEMBERS

President, Roxane Somerlot
Marion County Job & Family Services

Vice President, Greg Rose
Ohio State Marion

Treasurer, Kelly Marsh
Whirlpool Corporation

Nicole Workman
OhioHealth-Marion

Diane Glassmeyer
Self-Employed

Dr. Jackie Quach
Marion Area Physicians

Kurt Kimmel
Kimmel Cleaners

Amanda DeJonge
Ohio State Marion Student

Bruce Hagen
OhioHealth-Marion

Gary Barber
Marion City Schools

Ken Stiverson
Marion County Commissioner

Amber Thompson
Frontier Communications

Dr. Ryan McCall
Marion Technical College
NOMINATING COMMITTEE

Judge Deborah Alspach  Marion Common Pleas Court
Dusty Redmond  Attorney at Law
Gary Iams  Ohio State Marion
Leslie Schneider  Marion YMCA
Ken Stiverson  Marion County Commissioner
Nissa Stump  iHeart Media Marion
Diane Glassmeyer  Self-Employed

COMMUNITY IMPACT COMMITTEE

EDUCATION TEAM
Ryan McCall  Marion Technical College
Tami Galloway  Marion Technical College
Todd Schneider  Rushmore Academy

INCOME TEAM
Tom Kenney  Ameriprise Financial
Gary Ferriman  Showplace, Inc.
Chad Snyder  Snyder Funeral Homes
Randy Dawson  Wilson Bohannan Company

HEALTH TEAM
Katrina Harwood  Marion Public Health
Gary Iams  Ohio State Marion
Bruce Hagen  OhioHealth-Marion
Gary Branson  Marion Public Library

SAFETY NET TEAM
Tom Marks  Job & Family Services
Carlos Crawford  Crawford Law Firm
Steve Hardy  OhioHealth-Marion
Ken Stiverson  Marion County Commissioner
# Campaign Team

## Campaign Chair
- Thomas Quade

## Assistant Chair
- Lt. B.J. Gruber

## Industry
- Diane Watson
- Nicole Workman
- Nick Vanmeter

## Finance
- Neeta Shuff
- Linda Shepard
- Lu Chivington
- Steve McDonald

## Small Business
- Charlie Long

## Clubs/Special Solicitation
- Amber Wertman

## Public Service
- Becky Worley
- Tanya Hartings

## Professional
- Pam Workman
- Dr. Leonard Janchar
- Dr. David Fitkin
- Dr. Robert Finney
- Carlos Crawford
- Pastor Cory Rogers
- Steve Williams

## Education
- Kurt Moore
- Terry Conley
- Mike Ring

## Marion County & City Residential
- Diane Glassmeyer

## Pillars Club
- Gary Iams
AN OPEN-BOOK POLICY
In an effort to be as accountable as possible, United Way of Marion County is open and transparent when it comes to its financial records. Our annual audit is conducted by an independent CPA, and are available by request. In addition, our annual IRS Tax Form 990 and annual audit are both available for review at unitedwaymarion.org.

United Way of Marion County meets all membership requirements set forth by United Way Worldwide. We also continue to meet all 20 Standards of Charitable Accountability established by the Better Business Bureau.

2015 FINANCIAL SNAPSHOT (AUDITED)
(SOURCE: ANNUAL IRS FORM 990–FOR YEAR 2015)

<table>
<thead>
<tr>
<th>Category</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Revenue</td>
<td>$ 1,140,512</td>
</tr>
<tr>
<td>Agency Allocations/Program Expenses</td>
<td>$ 950,668</td>
</tr>
<tr>
<td>Campaign/Fundraising Expenses</td>
<td>$ 197,681</td>
</tr>
<tr>
<td>Total Expenses</td>
<td>$ 1,148,349</td>
</tr>
<tr>
<td>Total Assets</td>
<td>$ 1,450,569</td>
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<tr>
<td>Total Liabilities</td>
<td>$ 124,638</td>
</tr>
<tr>
<td>Total Net Assets</td>
<td>$ 1,325,931</td>
</tr>
</tbody>
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MEMBERSHIP REQUIREMENTS
Each year, United Way of Marion County must prove that it meets 12 requirements for United Way Worldwide membership along with the verification of the status of 70 indications that demonstrate it embodies the intent of the membership requirements. Partner Agencies of the United Way of Marion County pay no dues or service fees to be a part of our federation. Relations with Partner Agencies follow the annual Partner Agency Agreement, which can be found on-line at www.unitedwaymarion.org.
PILLARS

Alexis De Tocqueville Society
*Gifts of $10,000 or more*
George & Dorthy Alber Fund

Gold Pillars
*Gifts of $5,000 or more*
Ryan E. & Laurie A. Felchlin
Jennifer O’Keeffe-Monnin
Steve & Cindy Shuster
Donald & Pamela Stone

Silver Pillars
*Gifts of $2,500 to $4,999*
Rev. Kenneth V. Daniel
Gary & Mary Ann Ferriman
Dr. David Fitkin
Chuck & Connie Horne
Gary & Diana Sims
Scott Urquhart
Kristin Day

Copper Pillars
*Gifts of $1,500 to $2,499*
Steven L. Sayre
Judge Deborah Alspach
Dr. & Mrs. James M. Bazzoli
Shawn Birch
Dr. Robert & Nancy Crowell
Richard & Kim Dixon
Ted Graham
Mr. & Mrs. James S. Greetham Jr.
Mr. Joseph Hildebrand

Mike & Stephanie McDaniel
Brenna Colleen McElheny
Wes & Sarah Jo Peters
Kimlyn Queen

Bronze Pillars
*Gifts of $1,000 to $1,499*
Bruce A. Alexander
Timothy & Lori Anderson
Dr. Jeanne Ashworth
Pam and Dick Axline
Ted & Bronwen Babich
Judge Teresa Ballinger
John C. Bartram
Scott Beisner
Kevin Bradley
John A. Brodman
Warren Brown Family Foundation
Dick & Janet Bryson
Dr. Gary & Diane Burton
David & Diane Campbell
Ryan Campbell
Ms. Maureen Cole
Ken & Joan Comstock
William Condon
Rob & Tammi Cowell
Mr. Phil Depriest
Charles A. Dutton
Dr. Paul & Kelly Culler
United Way of Marion County would like to thank our Pillars for setting the standard of leadership giving in our community.

Bronze Pillars, cont.

Gifts of $1,000 to $1,499

Sabrina Elson
Mr. & Mrs. Gene Farison
Julia Fleming
Daryl & Valerie Gates
James R. Gifford
Adam & Gina Goodman
Malcolm Goodman
Mr. Robert Haas
Bruce P. Hagen
Larry A. & Linda S. Hall
Chuck & Pam Hall
Jeff Hart
Katrina Harwood
Dr. Jim & Anne Hering
Carl F. Hughes
Gary Iams
Dean & Sue Jacob
Steve & Mary Ann Jenkins
Steve & Brenda Johnston
Bob & Jan Jordan
Ron, Effie, & Jacque Laipply
Camie Laird
Donald E. Laird
Nancy Lankton
Jennifer Lawson
Charles & Christine Long
Mr. John Wesley McDaniel
Don & Judy Mount
Kathryn L. Prater
Xingyi Que
John K. Renner
Anthony Reynolds
Allen R. Rhinebolt
Michael & Connie Ring
John & Paula Roller
Dr. Elizabeth A. Roseberry
Ronald J. Scharer
Suzanne Schuler
Brenda R. Schulz
Mary Sharrock
Dan & Shelly Sheridan
Judge Jim & Heidi Slagle
Clifford L. Smith
Roxane Somerlot
Dr. J.T. & Carol Spare
Mr. & Mrs. Kenneth Stiverson
David & Cindy Strzalka
The Judge William Wiedemann

Family Fund

Lowell & Linda Thurston
Dr. Sanjay & Preena Vora
Mr. David Watson
Amber & Timothy Wertman
Jay & Julie White
Chris & Debbie Widrig
Daniel & Valerie Wigton
Barbara A. Young
The Sens Family
Jeff Freeman
George Lucas
Cory R. & Gabrielle Mayse
Beverly S. Young
Nicolle D. Wampler
COMPANY DONATIONS

A
Abbott Laboratories
Ag Credit
Amazon Smile Foundation
American Eagle Mortgage Company
American Electric Power
Andersen Windows & Doors
Anheuser Busch
AT&T

B
Bender Communications, Inc.
Better World Books
Boyd-Born Funeral Home
Bridgestone APM, Plant 2

C
Cardinal Health Group
Carroll’s Jewelers
Center Street Community Health Center
Chase Bank, JPMorgan
Chipotle
City of Marion
Coldwell Banker/Realty Plus
Consolidated Electric Co-op

D
Denzer, Farison, Hottinger & Snyder Funeral Home

E
Elgin Local Schools

F
Fahey Banking Company
Faint Charitable Foundation
Federal Employee Campaign
Finney Family Dental
First Citizens National Bank-Marion
FirstEnergy

G
Gannett Foundation
General Mills
Dr. James Gilsdorf
Goodwill Industries-Marion
GPD Group
Green Camp Lions Club
Gunder-Hall-Fold Funeral Directors

H
Heart of Ohio Homeless Shelter
Henry Lumber
Holbrook & Manter, LLP
Honda of America Mfg, Inc.
HPM North America

I
International Paper

K
Kegler, Brown, Hill & Ritter
Kellogg Company
Kimmel Corporation Upper
Kindred Healthcare Nursing Home
King Saver
Kingston Residence of Marion
Knights of Columbus-Council #671
Kohls
Kroger Company-South

L
Laboratory Corporation
Laipply’s Printing & Marketing Solutions, Inc.
LaRue After School Program
Legal Aid Society-Marion Branch
Let’s Read 20

M
Macy & Company
Marion Adolescent Pregnancy Program
Marion Area Chamber of Commerce
Marion Area Counseling Center
Marion City Offices
Marion City Schools
Marion Community Credit Union
Marion Community Foundation
Marion Council on Aging
Marion County Offices
Marion Independent Physicians Association
Marion Industrial Center
Marion Manor Nursing Home
Marion Matters
Marion Noon Kiwanis
Marion Public Library
Marion Technical College
McDaniel Automotive
Meijer, Inc.
Mid Ohio Energy Cooperative, Inc.
Miracle Driving Range
Mobile Meals of Marion County
Morral Companies
United Way of Marion County would like to thank the following generous companies and their employees for investing in our community.

| N | National Lime & Stone-Marion  
Nationwide Insurance  
Network For Good  
North Central Ohio Education Service Center  
Norton Sporting Goods, Inc.  
Nucor Steel Marion, Inc. |
|---|---|
| O | Ohio CAT  
Ohio Coalition for Education of Children with Disabilities  
Ohio Galvanizing Company  
OhioHealth Cancer Physicians  
OhioHealth-MGH  
OhioHealth-MAP  
Ohio Heartland Community Action  
Ohio State Marion  
OMI Management |
| P | Park National Bank  
Peace and Freedom Committee  
Peacock Water Conditioning  
Peltier Chiropractic Center  
Pleasant Local Schools  
PNC Bank  
POET Biorefining  
Dr. P.B. Singh  
Proscrap Lawn & Landscape Services |
| R | Richwood Banking Company  
Ridgedale Local Schools  
River Valley Local Schools  
Residential Home Association  
Rob’s Construction  
RR Donnelley |
| S | Safety City of Marion Ohio  
Sakumura  
Scharer Insurance  
Showplace Rent To Own  
Sims Brothers, Inc.  
Sims Recycling  
Sisler Sisler Sisler, Inc.  
Smith Foods Orrville, Inc.  
Smith Material Supply  
State of Ohio Employee Campaign  
St. Mary Elementary School  
Steam Turbine Alternative Resources  
Stifel Nicolaus  
Streetwise Motors |
| T | The Andersons  
The League of Women Voters  
The Mills Company  
Tower Construction  
Transportation Research Center  
Tri Rivers Career Center  
Triad Transport, Inc.  
Triple Team Maintenance  
Turning Point, Inc. |
| U | United Bank  
United Church Homes, Inc.  
United Federal Credit Union  
United Parcel Service  
United Way of Marion County  
US Bank  
US Yachiyo, Inc. |
| V | Valley Interior Systems, Inc.  
Verne Hart Insurance, Inc.  
VFW Ohio Charities-Post 3313 |
| W | Wal-Mart Store 1750  
Webb & Associates  
Wells Fargo Advisors  
Whirlpool Corporation  
Wilson Bohannan Company  
Wright Way Contracting  
Wyandot, Inc.  
WyCorp Management LLC |
| Y | Yancey Clinic  
YMEN |
| Z | Zachry Group |
Some form of annual community fund drive has existed in Marion County, Ohio since the mid-1930s. The Crusade Foundation, as it was known then, went through numerous mergers and name changes until September 1, 1972, when the name of United Way of Marion County (UWMC) was formally adopted by the local Board of Trustees. That year, United Way raised $347,000 for its membership agencies.

In the late 1990’s, with the changes in technology, economy and marketplace, United Ways realized that they had been raising money for years to treat symptoms rather than root causes. This realization prompted a major shift in philosophy – from fundraiser to problem solver. UWMC, along with thousands of other local United Ways, began to research issues in the community and set priorities. We began to ask questions like, “Why are people homeless and how can we help them to find home and become self-sufficient?” If they are homeless because they can’t find a job, then we need to help them become employable and find employment. If they are homeless because they don’t understand how to budget, then we need to teach them budgeting skills. The object is not to give them a meal and a bed in a shelter – it’s to make sure they never need a shelter again.

To accomplish this kind of lasting community change, we have become much more than a fundraiser. We have become researcher of and educator on community issues, a full partner in addressing those issues and an expert in measuring whether we’re making a progress. Positive progress for specific strategies in four primary areas: education, financial stability, health and safety net or emergency needs.

Early in 2011, the United Way of Upper Sandusky and Pitt Township made the decision to close its doors. A core of community leaders recognized that continuing United Way’s work was beneficial, and approached UWMC about a possible merger. In April of 2011, after much research and discussion, UWMC took on the responsibility for United Way activities in Wyandot County.

Similarly, in 2016, the United Way of Crawford County began discussions with UWMC to merge. UWMC was already providing their back office operations. Paperwork was completed in late 2016 to make the merger official.

Today, our United Way has become a regional organization, United Way of North Central Ohio, Inc., which promotes long-term community impact and fundraising activities across three north central Ohio counties. Although United Way activities in all three counties are administratively joined, the funds raised in each county remain in that county and United Way board representatives from each county make the allocation decisions for that county. Through this shared administrative structure, lessons learned in one location can be applied to another without “reinventing the wheel.” Economies of scale can be employed and training shared to enhance efficiency, ensure a quality organization and experience for donors and partners, and direct more donor dollars to programs that improve our communities.

We appreciate our history and are excited for the future!
PARTNER AGENCIES

American Red Cross-Marion
Boys & Girls Club of Marion County
Heart of Ohio Homeless Shelter
LaRue After School Program
Legal Aid Society
Let’s Read 20
Marion Adolescent Pregnancy Program
Marion Area Counseling Center
Marion Goodwill Industries
Marion Matters
Mobile Meals
Ohio Heartland Community Action
Safety City
Salvation Army-Marion
Scouting Scholarships
Turning Point
IMPACT AT A GLANCE

United Way engaged 1,833 volunteers which collectively saved community organizations $179,137 in financial resources.

**Education**

- **105,245** books disseminated to children in Marion County (via LET'S READ 20)
- **772** children have benefited from after school programs (via BOYS & GIRLS CLUB, LARUE AFTER SCHOOL PROGRAM)

**Health**

- **9,111** individuals gained access to mental health services and prescription medications (via MARION AREA COUNSELING CENTER, OHIO HEARTLAND COMMUNITY ACTION)
- **2,307** individuals were helped to avoid risky behavior (via MARION AREA PREGNANCY PROGRAM, SAFETY CITY, SCOUTING SCHOLARSHIPS)
United Way of Marion County and our partner agencies served 18,500 individuals in Marion County in the areas of education, financial stability, health, and safety net services. The numbers below represent the number of services provided for those individuals. Thank you to our partner agencies for your work in these areas.

284 individuals received housing assistance and/or meals delivered to their homes (via MOBILE MEALS, MARION AREA COUNSELING CENTER, MARION GOODWILL INDUSTRIES, SALVATION ARMY)

355 individuals were prepared with skills for job readiness (via MARION GOODWILL INDUSTRIES, MARION MATTERS, LEGAL AID)

716 victims received legal and personal assistance (via LEGAL AID, MARION AREA COUNSELING CENTER)

16,433 individuals were provided with emergency food, shelter, clothing, & prevention education (via AMERICAN RED CROSS, TURNING POINT, MARION GOODWILL INDUSTRIES, SALVATION ARMY, HEART OF OHIO HOMELESS SHELTER)
Mission:
United Way of Marion County provides leadership in mobilizing resources to provide opportunities for people to measurably improve their lives.

United Way of Marion County
125 Executive Drive, Suite 100
Marion, Ohio 43302
Phone: 740-383-3108
Unitedwaymarion.org

Follow United Way of Marion County on these social media sites: