



United Way

**2017
Annual
Report**

United Way of the Ocoee Region

**“We are responsible for the world in which we find ourselves,
if only because we are the only sentient force which can change it.”
- James Baldwin**

Dear neighbors and friends,

**Each generation has its own set of obstacles, its own battles to fight, its own barriers to conquer.
Each generation also has a renewed hope, innovation to build upon the foundation,
and dreams for a brighter tomorrow.**

**Eighty years ago, a few dedicated citizens in this community saw neighbors
struggling in the wake of a depression and a world war.
They decided to look beyond themselves to
build something for the common good and to build a foundation for those to come.**

**As we were going through old documents and looking back on where we started,
some things we needed to be told, like the campaign goal in 1938, which was \$4,000.
Or, that Eugene Callaway was the board chair in 1946.**

**Some things, however, we did not need to be told, like the fact that it is the
generosity and goodwill of the people of this community that made
all of this possible for the last 80 years, and it is that continued
goodwill and innovation that will allow us to continue to make strides for the
next 80 years. We will continue tackling problems at the root and providing
a healthy, educated, and financially stable Ocoee Region for everybody.**

**Thank you for contributions that make this possible, for serving those who have
found themselves in a time of need, and for being the force that will change the world today
as we look forward to building a better tomorrow.**



Matt Jenne | Sr. Vice President and Market Leader, Smart Bank

YEAR IN REVIEW



United Way

- 75 companies 
- 973 volunteers 
- 4 coalitions 
- 39,136 people/individuals empowered to improve their health, education...
- 4,000+ donors
- 2,731 hours of service
- 39 impact partners

LIVE UNITED.



United we face homelessness and unemployment. We fight for the health and the well-being of our community. We endeavor to ensure all children reach their full potential, no matter what the obstacles or odds. We surround a community's most critical problems, and for those whose names we don't know. United Way of the Ocoee Region fights for the health, education, and stability of every person in the Ocoee Region.

WOMEN UNITED OF THE OCOEE REGION

A group of women fiercely dedicated to changing lives through philanthropy, Women United fights for those who need a voice and those whose names we do not know. With over \$30,000 donated in 2017 alone, it was a record setting year building little libraries and fighting against things like domestic violence, job insecurity and childhood hunger.



Email AshlanMorelock@UnitedWayOcoee.org for more information.

TIMELINE

1938

What we now know as the United Way of the Ocoee Region, began as the Community Chest in 1938. During this first year, around \$3000 was allocated to two agency partners.

1943

Local donors rallied to support the effort in WWII and the campaign goal tripled when the War Fund in Tennessee was added as a partner agency.

1978

The United Fund of Bradley County becomes the United Way of Bradley County and raises over \$450,000 to be distributed among 18 different agency partners.

1985

United Way moves to current location in the old Princess Theater and the campaign reaches \$1,000,000 for the first time.

1995

The United Way campaign reaches \$2,000,000 for the first time.

1997

First year for the United Way to be led by a female Board Chair.

2007

The United Way of Bradley County received \$19.7 million from the sale of Bradley Memorial Hospital which became the Bradley Memorial Health Endowment Fund.

2008

The first grants are awarded through the Bradley Memorial Health Endowment Fund. A total of \$399,172 is distributed to 9 nonprofit different organizations.

2010

The United Way of Bradley County conducts our first large scale needs assessment, identifying adult dental care as a top un-met community need.

2014

The VISTA (Volunteers in Service to America) program brings over 15,000 hours of volunteer time to organizations in our community.

2016

The United Way of Bradley County becomes the United Way of the Ocoee Region to better represent our service area of Bradley, Polk, and part of Fannin County, GA. The United Way's Center for Social Impact is formed to work closely with local nonprofit organizations to help them grow and develop to best serve our community.

2018

The United Way of the Ocoee Region invests over \$3,000,000 through the Campaign and the Health Endowment Fund in over 40 nonprofit partners that are working to meet our community's greatest needs.



IMPACT AROUND THE OCOEE REGION



HEALTH

“I have lived my whole life with my mouth closed or not smiling at all. Now that I have my dentures, my life has changed dramatically! It gave me back my self worth and confidence. I now have a job working with the public that helps me provide for my granddaughter.”

- Mary, Karis Dental Clinic



EDUCATION

“My daughter was 2 when she started receiving Imagination Library books. I read to her every night instead of watching TV or playing with her toys. She ended up at a 12th grade reading level in just the 2nd grade.”

- Linda, Imagination Library Parent



United Way of the Ocoee Region

IMPACT AROUND THE OCOEE REGION



STABILITY

“I came to The Refuge after a long battle with cancer left me on disability and only \$630 a month to support my wife and 5 children. Things got scary and I almost gave up. You’re building a career and learning a trade no one can take away from you. I now have a job as a welder making 4 times what I was. It upgrades your whole life. I have more hope and aspirations in life. That little bit of hope is priceless.”
- Travis, Career Connection Graduate

United Way of the Ocoee Region

DAY OF ACTION

Our 5th Annual Day of Action was our biggest yet with over 300 corporate volunteers coming together to give back to the community in a BIG way! A HUGE thank you to our corporate sponsor, Whirlpool, who made the day possible!

Check Into Cash
Cleveland State Community College
Cleveland Utilities
Coke Consolidated
Cormetech
Duracell
Easy Auto & Sunrise Acceptance
Eaton Electric
Eaton Hydraulics
Elder's Ace Hardware
Jackson Furniture Industries
Life Care Centers of America
Lonza
Mars, Inc.
Publix
Rotary Club of Cleveland
Southeastern Container
Whirlpool



Day of Action Sponsored by:



Community Investors

Community Champions:

\$440,000 and above

Life Care Centers of America

\$250,000 and above

Whirlpool Corp. – Cleveland Division

\$75,000 and above

Lee University

\$60,000 and above

Check Into Cash

Cleveland Utilities

Whirlpool Customer Experience Cntr.

\$30,000 and above

Bayer

Bradley County Schools

Cleveland City Schools

Duracell

Easy Auto

Eaton

Electrical

Publix

\$20,000 and above

Brown Stove Works, Inc.

Jackson Furniture Industries

Resolute

United Parcel Service (UPS)

\$15,000 and above

Bank of Cleveland

Brenda Lawson & Associates

City of Cleveland Employees

First TN Bank

J & S Restaurants

Lonza

Manufacturer's Chemical

Wacker Polysilicon N.A., LLC

\$10,000 and above

Athens Federal Community Bank

Church of God International Offices

Cormetech

Family Resource Agency

Georgia Pacific

Southeastern Container

Southern Heritage Bank

Tocqueville Society

\$100,000 and above

Mr. Forrest Preston

\$25,000 and above

Mr. & Mrs. Chuck Jabaley

Mr. & Mrs. Allan Jones

\$15,000 and above

Mr. & Mrs. Robby Card

Mr. & Mrs. Ed Jacobs

Dr. & Mrs. Rodney and Margo Fitzgerald

Johnson Family Foundation

Ms. Sandra Morrison

\$10,000 and above

Mr. & Mrs. Bob Card

Mr. & Mrs. Ronald Jackson

Mrs. Doris B. Johnson

Mr. & Mrs. Summerfield Johnston

Mr. & Mrs. Stan & Brenda Lawson

Mr. Don Lorton

Mr. & Mrs. Sam McReynolds

Mr. & Mrs. Davis Morelock

Mr. & Mrs. John Sheehan

Ms. Cindy Slater

Dr. & Mrs. Paul Grayson Smith, Jr.

IMPACT PARTNERS

American Red Cross

Andor*

Benton United Methodist Church

- Feed the Kids Program

Boehm Birth Defects Center

Boys & Girls Club of Benton

Boys & Girls Club of the Ocoee Region

Bradley Baptist Association

- Ocoee Outreach

Bradley Cleveland Public Education Foundation*

- Telemedicine Program

CASA of Bradley & Polk Counties

Centerstone*

Cherokee Area Council Inc., Boy Scouts
of America

Cleveland Emergency Shelter

Cleveland Family YMCA

- Diabetes Prevention Program

- Afterschool Program

- Livestrong Program*

Committee on Aging's Home Delivered Meals

Copper Basin Crisis Center

Copper Basin Health Care Foundation

- Backpacks for School Program

Crisis Closet at Copper Basin High School

Family Cornerstones' Starfish Program

Family Promise of Bradley County*

Fellowship of Christian Athletes

Family Resource Agency

- Family Violence Program

Girl Scouts of the Southern Appalachians, Inc.

Girls on the Run of SE TN *

Habitat for Humanity of Cleveland

- Be Smart About Money Program

Impact Cleveland*

Karis Dental Clinic*

Kiwanis Club Ocoee

Legal Aid of East Tennessee

Lion's Club Vision Program of Cleveland
& Benton

Lee University Developmental Inclusion
Class (LUDIC)

Museum Center at Five Points

People Helping People

Polk County Friends of the Library

- Imagination Library

The Caring Place's Sac Pac Program

The Hope Center's Child Advocacy Center

The Refuge Cleveland

- Career Connection*

- Human & Social Services

United Way of the Ocoee Region

- Center for Social Impact

- Imagination Library

YMCA's YCAP

- Cleveland Middle School

- Lake Forest Middle School*

*denotes endowment fund partners

United Way of the Ocoee Region

ACCOUNTABILITY



Statement of Financial Position 2017

Assets	32,868,443
Liabilities	3,245,264
Net Assets	29,623,179



Statement of Activities

Revenue	
Annual Campaign 2017 for Program Funding	2,107,642
Impact Cleveland TVA Grant	2,706,486
BMHEF Investment Returns	3,864,963
Other Grants and Income	603,201
Total Revenue	9,282,292



Expenses

Program Funding	2,702,433
TVA Energy Makeovers	2,442,389
BMHEF Grants	1,691,790
BMHEF Investment Fees	176,528
Community Projects/Events	731,759
Support Services	505,793
Total Expenses	8,250,692
Change in Net Assets	1,031,600

TRANSPARENCY: All supporters, partners, and others have access to all United Way of the Ocoee Region documents on our website at:
www.unitedwayocee.org/transparency

- > Our mission and how we accomplish it
- > Annual audited financial returns
- > Annual Report
- > Board of Directors roster
- > Staff roster
- > Partner listing
- > Bylaws



United Way of the Ocoee Region is a Better Business Accredited Charity and 4 Star Rated by Charity Navigator

*Programming includes all Campaign & Health Endowment Grants as well as all Polk County Grants.
See Complete audited financial statements at unitedwayocee.org

LIVE UNITED®

BOARD OF DIRECTORS

* indicates member of Executive Committee

Janice Baker
Human Resource Manager
Lonza

Ralph Baldwin
Publisher
Cleveland Daily Banner

Keith Barrett
Area Manager
Pinnacle

Milan Blake
County Commissioner, 3rd District
Chairman Finance Committee

Ron Braam
Community Advocate

Bruce Bradford
Senior Loan Officer
River Valley AgCredit

Mike Callaway
Community Advocate

Dr. Linda Cash
Director of Schools
Bradley County Schools

Nancy Casson*
Owner
The Red Ribbon

Brenda Choate
Human Resources Mng.
Cormetech, Inc.

Delita Cobb
Plant Manager
Duracell

Dr. Phil Cook*
Vice President of Admissions
Lee University

Dr. Russell Dyer
Director of Schools
Cleveland City Schools

Ron England
Project Manager
Atos Corp.

Cesar Escarcega
Plant Manager
Eaton Electrical

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Plant Manager
Eaton Electrical

Dr. Bill Estes
Dean, Helen DeVos College of Education
Lee University

Gary Farlow*
President/CEO
Bradley/Cleveland Chamber of Commerce

Cameron Fisher*
Communications Coordinator
Church of God International Offices

Dr. Rodney Fitzgerald*
Community Advocate

Joe Fivas
City Manager
City of Cleveland

Coleman Foss*
CEO
Tennova Healthcare, Cleveland

Mike Griffin*
Community President
First TN Bank

Dr. Shane Griffith*
Associate Professor & Director of
Graduate Studies in Business
Lee University

Tim Henderson
President & CEO
Cleveland Utilities

Terry Henry*
Senior Vice President of Accounting
Life Care Centers of America, Inc.

Taylor Howard
Senior Vice President, Lending
Athens Federal Community Bank

Chuck Jabaley
Community Advocate

Carolyn Jackson
Community Advocate

Matt Jenne*
Sr. Vice President and Market Leader
Smart Bank

Steve Ledbetter
President
Southern Heritage Bank

Don Lorton*
Community Advocate

Paulette Madson
Director of Human Resources
CSC Investments

Bill Moats
CEO
Ocoee Regional Health Corporation

Erika Moore
Owner
Bonlife Coffee

Jeff Morelock
Community Advocate

Chris Newton*
Director of Human Resources & Compliance
Brenda Lawson & Associates

Verrill Norwood, Jr.
Community Advocate

Jim Nowack
Manager, IT Projects
Eaton Corporation

Dr. Rubi Porter*
Community Advocate

Art Rhodes
President & CEO
Church of God Benefits Board

Ron Sellers
Community Advocate

Dr. Bill Seymour*
President
Cleveland State Community College

Randall Slack
Manager
Elder's Ace Hardware

Alex Starling
General Manager
Publix

Barbara Stone
Community Advocate

Thomas Tirabassi
Vice President, Supply Chain Management
Olin Corporation

Dr. Matthew Tolbert*
Assoc. Professor of Psychology
Southern Adventist University

WM (Mickey) Torbett*
Community Advocate

Dr. Madison Torrence
Emergency Department Physician
Tennova Healthcare, Cleveland

Donnie Upshaw
Vice President of Human Resources
Check Into Cash

Dicky Walters
Plant Leader
Whirlpool Corporation – Cleveland Operations

Gabriele Weber
Manager, Employee Relations and Global Mobility
Wacker

Andy Williams*
Senior Executive of Sales & Account Management
Ed Jacobs & Associates

Nelson Wooldridge
Community Advocate

