



Health. Education. Income.



**Greater Gallatin
United Way**

LIVE UNITED

2010 ANNUAL REPORT

www.GreaterGallatinUnitedWay.org

2010 BOARD OF DIRECTORS

Diverse business and community members volunteer to serve as board members with Greater Gallatin United Way, providing leadership and governance to the organization and ensuring public transparency in all actions and activities. Our community is a better place because of them.

Officers

BOARD CHAIR

Rick Ojala, *Aspen Pointe at Hillcrest*

FIRST VICE-CHAIR

Sylvia Drain, *Wells Fargo Bank*

SECOND VICE-CHAIR

Dan Gustafson, *Lee & Dad's IGA*

SECRETARY

Sue Hill, *SWMT Financial Center*

TREASURER

Wendy Wigert, *MT Conservation Corps*

Dana Aughney, *First Interstate Bank*

Megan Berg, *MSU Foundation*

Jane Foster, *U.S. Bank*

Mike Hegel, *Northwestern Energy*

Scott Holton, *Rudd & Co.*

Matt Kelley, *Gallatin City-County Health Dept.*

Roxanne Klingensmith, *St. James Episcopal Church*

Ray Knox, *Valley Bank of Belgrade*

Erin Macdonald Peck, *MSU Assist Dean of Students*

Randy McCorkhill, *Hyalite Publishing Co.*

Directors

Kirk Miller, *Bozeman Public Schools*

Joseph Militello, *Stifel Nicolaus & Co.*

Denise Palmquist, *Bozeman Broker Group*

Stephanie Pressly, *Bozeman Daily Chronicle*

Laura Rhodes, *Third Sector Consulting Group*

Karin Ronnow, *Bozeman Daily Chronicle*

Tom Starner, *Gene Cook Real Estate*

Carrie Taylor, *First Security Bank, Belgrade*

Debe Youngberg, *Belgrade Chamber of Commerce*

Officers are elected to a one-year term. Board members are elected to three-year terms. In 2010, the Board met on the first Thursday of each month at the Holiday Inn of Bozeman at noon. The annual meeting was held Feb.12 at the Holiday Inn at noon.

ACCOUNTABILITY

Transparency, fiduciary responsibility, and public trust are core values at Greater Gallatin United Way. Financial policies are implemented, financial statements approved regularly, and expenses continuously monitored. View complete financial reports online at www.GreaterGallatinUnitedWay.org.

Audited Financial Reports

June 30, 2010

Statement of Financial Position

Current Assets	\$709,225
Other Assets	1,354
Endowment Investments	<u>242,998</u>
Total Assets	\$953,577
Current Liabilities	\$ 9,215
Allocations Payable	430,315
Net Assets	<u>514,047</u>
Total Liabilities	\$953,577

Statement of Activities

Support and Revenue

Annual Campaign	\$627,189
Less Uncollectible Pledges	(17,887)
Restricted Grants	151,777
Less Net Investment Loss	58,435
Other Income	<u>87,305</u>
Total	\$906,819

Expenses

Allocations and Program	\$706,526
Fundraising and management	<u>121,190</u>
Total	\$827,716

Change in Net Assets **\$79,103**

The independent audit was prepared by
Junkermier, Clark, Campanella, Stevens, P.C.

OUR MISSION IS TO IMPROVE LIVES BY MOBILIZING THE CARING POWER OF COMMUNITIES.

DEAR FRIENDS

Serving as Board Chair for two consecutive terms and as your staff executive for the last 14 years, we have seen hundreds of new donors step up to help with small gifts during a time of serious economic issues. While we have raised fewer dollars our staff and volunteers and many partners have magnified their efforts to ensure that our community did not step backwards in our efforts to raise the bar on improving outcomes for people in regard to health, education, and financial stability. Through careful planning and tough decisions, Greater Gallatin United Way remains responsive and responsible to our donors and community.

Our community is filled with people like you, people with open, caring hearts, people who are choosing to LIVE UNITED.

Thank you for making our community a better place.

Rick Ojala

Rick Ojala
Board Chair



Carol Townsend

Carol Townsend
President and CEO



Photo by: Thomas Lee

BUILDING A STRONG COMMUNITY

Greater Gallatin United Way investment goals are focused on three building blocks of a strong community: Health, Education, and Income. These building blocks are intertwined; if one is not available, the current and future health of the community is weakened. By addressing underlying causes, we can bring about lasting change. We are fortunate to have key partners across all sectors.

HEALTH

With our partners, we are increasing access to health care, good nutrition, increased mental well-being, and promoting healthy choices through many activities:

- Convening discussions and promoting increased mental health services
- Funding senior nutrition programs and other services, and advocating to keep seniors living independently as long as safely possible
- Enrolling children in the Children's Health Insurance Program and funding children's dental care; increasing their opportunities for exercise
- Funding hope, healing, and safety programs for domestic violence and sexual assault victims
- Conducting advocacy and outreach to ensure that women get life-saving mammograms
- Distributing FamilyWize prescription drug discounts, resulting in consumer savings of \$37,764
- Funding crisis counseling, suicide prevention services, and helping connect people to 211, an easy to dial information center for social services
- Advocating and promoting volunteerism because social capital is a critical measurement of improving community conditions



INCOME

We are working with many partners to stabilize people in financial crisis and improve their self-sufficiency:

- Participant in Greater Gallatin Homeless Action Coalition and funder of homeless prevention services
- Educating families on the Earned Income Tax Credit, the largest unclaimed credit that could be a major step to financial stability and create savings
- Funding and advocating the support of all area food pantries, the first line of defense when financial crisis strikes
- Partner in and fiscal agent for Project Homeless Connect



EDUCATION

Keeping kids on track to achieve their full potential starts at the cradle. High School drop outs are not created in high school, we can identify with likelihood who will drop out by 3rd grade. Armed with that knowledge we have major partners engaged in discussions, activities, and services to:

- Support services and advocate for children who are neglected, abused, or in need of a caring adult to help shape their future
- Convening a SUCCESS BY 6 coalition of committed community leaders who are invested in healthy childhood development and school readiness; funding programs and activities that support early learning and parent tools for early learning
- Directly administering and supporting Greater Gallatin United Way's kidsLINK initiative, 23 after school program sites serving 1,000 children regularly; beyond a safe place, the sites provide good nutrition, healthy physical activities, homework assistance and/or tutoring and other enrichment to support their social, emotional, and academic success
- Convening key stakeholders in a coalition called GRADUATION MATTERS, committed to sharing resources and raising voices to increase high school graduation rates
- Increasing healthy behaviors in 5-18 year old populations through funding prevention and intervention programs that give kids and parents tools for success



VOLUNTEERISM

Advocating and promoting volunteerism because social capital is a critical measurement of improving community conditions

- 550 volunteers registered
- 120 area nonprofits registered
- 45 current opportunities to volunteer

www.VolunteerMT.org

A SPECIAL THANK YOU!



Major Community Funders

Gilhousen Family Foundation, Mountain Sky Guest Ranch Fund, Tim and Mary Barnard

Top Giving Companies

Bozeman Deaconess Health Services
 Billion Auto Group
 Colombo's Pizza & Pasta
 Holcim (US) Inc.
 Wells Fargo Bank
 U.S Bank
 First Interstate Bank
 Murdoch's Ranch and Home Supply
 Dennis & Phyllis Washington Foundation
 Lee & Dad's IGA
 Wal-Mart
 Big Sky Western Bank
 Mark D. & Pam Refling Attorney
 Cashman Nursery & Landscaping
 Northwestern Energy
 American Bank of Montana
 Thad DDS & Terry Langford
 Simpson Honda
 Tarlow, Stonecipher, & Steele PLLC
 Junkermier, Clark, Campanella, Stevens
 Qwest
 Gallatin Valley Furniture/Carpet One
 JC Penney Co.
 Bridger Biomed, Inc.
 Bequet Confections
 First West Insurance
 BioScience Laboratories, Inc.
 Goetz, Gallik & Baldwin PC
 Lehrkind's Inc. / Coca-Cola
 Pheasant Farms, LLC
 Simkins-Hallin Lumber Co.
 Target
 Witt & Associates Realty
 Macy's
 R.S Construction
 Cindy Younkin, Atty
 Howard's Heating
 American Federal Savings Bank
 Corral Bar, Inc.
 Mountain Hot Tub

Owenhouse Ace Hardware
 Resource Systems, LLC
 Schafer Construction, Inc.
 Wild West Shirt Company
 Grantree / Best Western
 Holiday Inn
 Hilton Garden Inn
 Royal 7 Budget Inn
 State Farm Insurance/ Dan Rust
 United Parcel Service
 J & H Inc.
 DA Davidson
 Thomas, Dean & Hoskins, Inc.
 Erotique
 Outdoor Maintenance Service, Inc.
 Professional Financial Management
 A & D Auto Body Repair, Inc.
 AROD Management
 Big Sky Stained Glass
 House of Clean
 Lucky Dog Lodge
 Langohr's Flowerland
 Mike Lilly, Atty
 Rocky Mountain Credit Union
 Tow Haul
 West Paw Design
 Owenhouse Properties

Special thanks to our local media

ABC/Fox Max Media
 KBZK -Z7 CBS
 Bozeman Daily Chronicle
 GAPWEST Broadcasting
 KTVM—NBC
 Reier Broadcasting
 Bresnan

Funded Partners 2010-2011

**EDUCATION
 Keeping Kids on Track to Achieve
 Their Potential**

kidsLINK Afterschool Programs at:
 Anderson School
 Amsterdam School
 Belgrade School District / Ridge View
 and Belgrade Intermediate School,
 Belgrade Library Intermediate Program
 Big Timber School
 Bozeman School District / Hawthorne,
 Longfellow, Whittier, Irving, Emily
 Dickinson, Hyalite, and Morningstar
 Gardiner School District
 LaMotte School District
 Landon's Lookout-Livingston
 Livingston Links Summer Program
 Manhattan School District
 Monforton School District
 Ophir School District
 Stevens Youth Center, White Sulphur
 Springs
 Three Forks School District
 West Yellowstone Task Force
 Child Care Connections
 Peer Mediation / Community Mediation
 Center (CMC)
 Gallatin County CASA / GAL Program
 Girl Scouts
 Park County CASA / GAL Program
 Child Advancement Project (CAP) / Thrive
 Youth Justice Courts / CMC

**INCOME
 Improving People's
 Financial Stability**

Bozeman School District / Young Parents
 Program
 Low Income Family Mediation / CMC
 Family Promise of Gallatin Valley
 Galavan / HRDC
 Partnership Project / Thrive
 Hearts and Homes
 Gallatin Valley Food Bank / HRDC
 Home-To-Stay / HRDC
 Livingston Food Pantry
 The Parent Place / Thrive

**HEALTH
 Improving Access to Care for
 Physical, Emotional and
 Mental Health**

Belgrade Senior Center / Senior Nutrition
 Program and Meals on Wheels
 Community Health Partners / Dental Care
 for kids
 Crisis Calls and Suicide Prevention / Help
 Center
 Sexual Assault Center / Help Center
 Haven / Domestic Violence Shelter and
 Legal Advocacy
 Greater Gallatin United Way / Bozeman
 Deaconess Hospital / Mammogram
 Project
 Bozeman Senior Center / Senior Nutrition
 Programs and Meals on Wheels
 Homemaker Personal Care Program / HRDC
 Manhattan, Three Forks, West Yellowstone
 Senior Nutrition Programs and Meals on
 Wheels



THANK YOU FOR REACHING OUT,
 FOR GIVING BACK,
 FOR INSPIRING HOPE,
 AND CREATING OPPORTUNITIES. THANK YOU
 FOR CHOOSING
 TO LIVE UNITED.

Thank you to the thousands who have made their 2010-11 gift or pledge.

For those of you who have not had a chance to give this year and would still like to:

Name _____
 Address _____ City _____ State _____ Zip _____
 Phone _____ Email _____

- My gift to Greater Gallatin United Way: \$ _____**
- My check/cash is enclosed (please make check payable to Greater Gallatin United Way)
 - Please charge my gift to my credit card: VISA MC AMEX # _____ Exp _____
 - Please bill me for my gift: One time Monthly Qtly
 - Online at: www.GreaterGallatinUnitedWay.org
 - I would like to transfer stock to Greater Gallatin United Way (please estimate value; we will contact you for transfer)
 - I would like information about including a gift to the Greater Gallatin United Way in my will.



Carol Townsend, President and CEO
 Angela Pickett, Community Outreach Director
 Megan Brenna, kidsLINK Program Director
 Tanya Gonzalez, Accounting
 Emma Reid & Alanna Brown, AmeriCorps VISTA
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