

LIVE UNITED

**United
Way**



Berkshire United Way



ANNUAL REPORT

July 2013 - June 2014

Improving the quality of life in Berkshire County by mobilizing resources to address community priorities and create sustainable change.

OUR CHILDREN SUCCEED. YOUTH MAKE HEALTHY DECISIONS. OUR COMMUNITY THRIVES.

WORKING TOGETHER TO GET THINGS DONE

OUR WORK FOLLOWS AN INTERCONNECTED, STRATEGIC CONTINUUM:



Berkshire United Way recruits people and organizations who bring the passion, expertise and resources needed to make sustainable changes. LIVE UNITED is a call to action for everyone to be part of the change.



Berkshire Bank, Kelly Marion from Gladys Allen Brigham Community Center, and Beverly Gans from Taconic High School were honored at the Live United Community Celebration Volunteer Recognition event.



Mary Pope Osborne, left, author of the Magic Tree House children's book series, with her sister Natalie Pope Boyce, donated over 1,200 books to children in Berkshire County through a partnership with the Pittsfield Promise early literacy coalition.



Berkshire United Way hosted a Day of Caring event at three locations throughout the county that focused on mulching a playground in Pittsfield, cleaning the historic Riverwalk in Great Barrington, and painting a classroom in Lanesborough.

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ADVANCING THE COMMON GOOD

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President and CEO
Kristine Hazzard

As a community, we need to invest time, money and spirit in our future – in the place we call home. Coming together with a common goal to improve the overall quality of life for our residents is critical. It is up to the community to decide what kind of future we want to create for ourselves and our children.

On the previous page, you can see Berkshire United Way's work along a continuum; starting early to ensure that our children read proficiently, that our teens make healthy decisions and finally, that our families are financially stable. The path leads to every Berkshire County resident being self-sufficient, proud of, active and engaged in our community.

Why do these goals matter? What's the return on investment?

Did you know that the auto industry total of the US economy is 1.5% of total Gross Domestic Product (GDP)? Comparatively, the expense to raise a child from pre-natal to 18 years old -- including food, clothing, diapers, supplies, and more -- is over 10.5% of GDP. That's larger than the entire financial sector. This complex "production process," known as parenting, is one of the toughest jobs on earth. With that much money invested, don't we want to ensure that the end result is the very best it can be?

Berkshire United Way and its community partners are making those investments and keeping our children and families on track as they progress on the path:

- Parents are demonstrating skills to build strong competent families, with over 840 parents served by funded partners (up 10% over last year).
- Our coalitions assisted over 10,000 children and families through book distributions, parent trainings, professional development and advocacy efforts throughout the county.
- The teen birth rate and 8th grade 30-day alcohol use rate in Berkshire County have dropped by 50%, due in part to our community coalition work.
- Over 4,000 individuals increased the amount of money they had on hand through income maximization programs and trainings.

Berkshire United Way is about lasting community change, not short-term charity. We do this by focusing on the big picture and holding ourselves, and the community, accountable for meaningful results. You can be a part of the change. You can give, advocate or volunteer to help build a community of hope and opportunity where every individual and family lives, works and thrives.



Kristine Hazzard
President and CEO
Berkshire United Way

Brenda Burdick
Senior Manager, Marketing and Public Relations, General Dynamics
Berkshire United Way Board of Directors Chair

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EARLY CHILDHOOD LITERACY



OUR EARLY CHILDHOOD LITERACY INVESTMENTS IN THE COMMUNITY

- Quality early education
- Home visiting
- Professional development
- Assessment and referral services
- Advocacy
- Consulting
- Quality Out-of-School-Time programs
- Building community awareness
- Creating shared curricula
- Summer lunch and learn
- Early intervention services
- Building strong competent families
- Literacy coaching for parents
- Parent workshops
- Focus groups with parents
- Literacy bags for newborns
- School readiness fair
- National Summer Learning Day
- Word of the Day/Book of the Week
- PJ Night at the Museum
- Community presentations and education
- Participant at Third Thursdays
- Book drives
- Multi-sector, public/private partnerships

Our goal is to work with the community to improve third grade reading proficiency to 90% by 2020.

“My hopes and dreams for my daughter are that she is successful with school so she can start her own business in whatever makes her happy. But I also hope she struggles sometimes, so she can learn to problem solve and not always rely on others to fix things for her.”

- a local Mom.

WHY FOCUS ON EARLY CHILDHOOD LITERACY?

We know the return on investment is incredible, with research indicating that \$8,000 invested in early childhood literacy yields \$800,000 in income to the individual over his/her lifespan.

A LOCAL STORY:

Sarah and Connor are parents who say they are thankful for the support they received from the community. They were excited to have twins and receive one of the 291 baby literacy bags -- filled with tips, tools, books and more -- that was handed out last year to all new parents at Berkshire Medical Center through the work of the Pittsfield Promise. They soon discovered that one of their twins, Lydia, had developmental disabilities, and sought support from their community.

RESULTS THAT MATTER:

Lydia spent time in early intervention programs, where she was among the 93% of children who showed developmental improvement and increased language skills after receiving services. At the same time, Sarah and Connor, just like over 846 other parents, developed stronger parenting skills while also participating in Parent Power community trainings, at which they were among the 90% who reported gaining knowledge about how their child grows and learns.



“We have learned so much,” Connor said. “We know that Lydia has gotten off to a strong start developmentally, and this will help her be ready for the next big step to pre-school.”

Our work, with our community partners, has helped thousands of Berkshire County families receive services to get on track, help build strong competent families, and help our children succeed.

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POSITIVE YOUTH DEVELOPMENT

Our goal is to encourage youth to make healthy decisions by providing tools that ensure high school graduation.

“I can say things to my mentor without her yelling at me. She tells me what I need to know so that I can feel more positive about the choices I make. I might make mistakes, but I know that she believes in me and she gives me healthy things to do instead of getting high.”

- 9th grade student.

WHY FOCUS ON POSITIVE YOUTH DEVELOPMENT?

We know that over a 45-year career, the earning difference between a drop-out and someone with only a high-school diploma can amount to more than \$700,000.

A LOCAL STORY:

Tanya was a junior in high school when she got pregnant with her daughter Madison. Tanya joined the Helen Berube Teen Parent Program, where she was able to continue studying at her local high school. Madison needed special care for a heart condition, so the Helen Berube program connected the family with Redfield House, the Department of Children and Families, Visiting Nurse Association and more, so Tanya could get the community support she needed in order to stay on track in the face of these obstacles.

RESULTS THAT MATTER:

Tanya was one of the 365 youth participating in academic support programs to improve their grades. She was part of the 2,100 youth who improved their positive decision-making skills, and joins the 97% who feel more connected through community service efforts locally.



“I’m so grateful for the support,” Tanya said. “I knew I didn’t want to become another statistic. This community was there for me and my daughter.” Tanya recently walked across the stage to accept her high school diploma, and is now enrolled at Berkshire Community College.

Consider the fact that the taxpayer cost to support the 63 births to

teens in 2013 in Berkshire County from the time of birth to age 18 is about \$2 million. That same investment would allow for two years of funding quality mentoring programming for all local high-school students.

Working with the community, we have helped thousands of local youth build aspirations for the future and stay on track to graduate.



OUR POSITIVE YOUTH DEVELOPMENT INVESTMENTS IN THE COMMUNITY

- College and work readiness
- Mentoring
- Civic engagement and youth leadership
- Alcohol-free youth events
- Mental health services
- Building strong competent families
- Building community awareness
- Advocacy
- Active Parenting workshops
- Substance abuse prevention education in the schools
- SAY It Proud awards
- Shoulder taps surveys
- Social norms campaign
- Sticker shock
- Alcohol purchase surveys
- Trainings for providers, teachers and educators
- Community presentations and education
- Participant at Third Thursdays
- Multi-sector, public/private partnerships
- Let’s Be Honest workshops
- Prescription Rx roundup
- Increase access to reproductive health services
- Quality Out-of-School-Time programs

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FINANCIAL STABILITY



OUR FINANCIAL STABILITY INVESTMENTS IN THE COMMUNITY

- Volunteer Income Tax Assistance Program (VITA)
- Increasing Earned Income Tax Credit (EITC) returns
- Comprehensive services addressing the well-being of the whole family
- Coaching on budgeting, credit, investment, savings and assets
- Financial stabilization through education and mentoring
- Safe and affordable housing
- Workforce development - helping families sustain employment
- Access to educational opportunities and job training
- Crisis intervention
- Focus on increasing skills to better manage income and maximize self-sufficiency
- Linkages to community resources
- Public benefits screening
- Advocacy
- Multi-sector, public/private partnerships
- Building community awareness
- Building strong competent families
- Community presentations and education

Our goal is to increase the financial stability of working families in Berkshire County.

“We were living with no hope, but with community support and hard work we feel that nothing can stop us now. We see a good future for the boys. They both found mentors that have inspired them, and our entire family.”
- a local family.

WHY FOCUS ON FINANCIAL STABILITY?

Did you know that many Berkshire County employees are only one small crisis away from significant financial hardship that can affect their ability to maintain stability in the workplace?

A LOCAL STORY:

Helena, a single mom living in Great Barrington, had recently gotten sick and lost her job. She had amassed debts from taking out student loans and was finding it difficult to make ends meet. She worked with Construct and learned tips on how to save money and received financial literacy advice. Helena joined the other 3,700 individuals countywide who achieved economic stability and was one of the 530 who re-entered the workforce.

RESULTS THAT MATTER:

Helena was connected to the Volunteer Income Tax Assistance (VITA) program, which, in 2013, secured over \$1.3 million in tax refunds to 985 working families (over half a million dollars more than in 2012). The \$1.3 million brought back to working families is equal to the cost of school supplies for over 2,050 students.

“The VITA program and support from this community has been life changing,”

Helena said. “I got back on my feet, filed my taxes for free, used my better understanding of finances to save and pay off my student loans, and am beginning to see a clear path forward for a brighter future for my family. I feel like I can hope again.”

Thousands of families have been helped by our investments in financial stability programs and activities, and through our community partners’ work to help ensure that no family has to go it alone in Berkshire County.



2013-2014 FINANCIAL INFORMATION

STATEMENT OF FINANCIAL POSITION

	As of June 30th, 2014
ASSETS	
Cash & Investments	\$2,678,329
Net Pledges & Grants Receivable	1,002,326
Other Receivables & Prepaids	49,857
Property & Equipment	377,855
TOTAL ASSETS	<u><u>\$4,108,367</u></u>
LIABILITIES	
Community Investment Grants Payable	\$1,366,887
Designations Payable	217,501
Accounts Payable, Deferred Revenue & Accrued Expenses	82,533
Note Payable	73,358
TOTAL LIABILITIES	<u><u>\$1,740,279</u></u>
NET ASSETS	
Unrestricted	\$1,682,243
Temporarily Restricted	199,557
Permanently Restricted	486,288
TOTAL NET ASSETS	<u><u>\$2,368,088</u></u>
TOTAL LIABILITIES & NET ASSETS	<u><u>\$4,108,367</u></u>

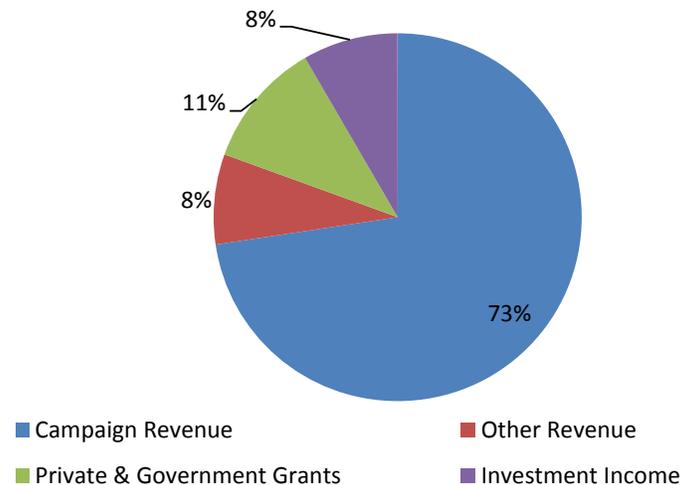
STATEMENT OF ACTIVITIES

	For the Year Ended June 30th, 2014
REVENUE, GAINS & OTHER SUPPORT	
Campaign Revenue	\$2,483,442
Private & Government Grant Revenue	379,399
Other Revenue	270,532
Investment Income	286,026
TOTAL REVENUE, GAINS & OTHER	<u><u>\$3,419,399</u></u>
EXPENSES	
Community Investment Grants	\$2,154,545
Designations & Allowance	365,567
Fundraising Expenses	319,827
Support Services	306,928
TOTAL EXPENSES	<u><u>\$3,146,867</u></u>
CHANGE IN NET ASSETS	<u><u>\$272,532</u></u>
NET ASSETS, JULY 1ST, 2013	<u><u>\$2,095,556</u></u>
NET ASSETS, JUNE 30TH, 2014	<u><u>\$2,368,088</u></u>

NUMBER OF PEOPLE IMPACTED BY TOWN AND SOURCES OF REVENUE

Adams	575	New Ashford	8
Alford	10	New Marlborough	51
Becket	181	North Adams	853
Cheshire	194	Otis	108
Clarksburg	59	Peru	56
Dalton	1307	Pittsfield	6908
Egremont	48	Richmond	73
Florida	22	Sandisfield	64
Great Barrington	1247	Savoy	37
Hancock	26	Sheffield	310
Hinsdale	117	Stockbridge	191
Housatonic	170	Tyringham	23
Lanesborough	221	Washington	24
Lee	1198	West Stockbridge	113
Lenox	357	Williamstown	320
Monterey	45	Windsor	45
Mount Washington	10		

Revenue, Gains and Other Support



In addition, our community coalition work impacted 10,000 lives throughout the county.

Audited financial statements available upon request.

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LIVE UNITED IS A CALL TO ACTION

Community and Strategic Partners

In order to achieve lasting results, it takes the community working together on common goals. Berkshire United Way convenes, facilitates, and leads people and organizations from throughout the county to focus on getting the job done. It takes the collective efforts of hundreds of our partners, including:

School districts
Law enforcement
Federal, state and regional funders
National and state advocacy groups

Higher education
Small and large businesses
Public and civic leaders
Health and human service providers

Cultural institutions
Faith-based organizations
Neighborhood initiatives
Media groups

And we work with the following community coalitions that are improving conditions for children and families:



Together, with our community partners, we have impacted the lives of over 26,000 people. For a complete listing of all partners, please head to berkshireunitedway.org/partners.

GIVE. The easiest and most powerful way you can make an impact is through a tax-deductible donation. Donate online, by check, through payroll deduction at your workplace or through your bank.

ADVOCATE. You can make change happen with your voice. Get informed. Tell your friends. Write a letter to the editor.

VOLUNTEER. Join a committee or a community coalition. Help at an event. Intern with us. Develop and lead a project.



NEED HELP?
CALL 2-1-1
Receive 24/7 referrals
to community resources



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