



# UNITED WAY OF ROGERS AND MAYES COUNTIES INC

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EIN: 73-1249045  
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# UNITED WAY OF ROGERS AND MAYES COUNTIES INC

📍 Claremore, OK  
🌐 www.uwrmc.org  
📞 (918)343-1165

[View GuideStar Profile](#)



## MISSION

BENEVOLENCE-FUNDING CHARITABLE ORGANIZATIONS

## EIN

73-1249045

## RULING YEAR

1987

## IRS SUBSECTION

501(c)(3) Public Charity

## MAIN ADDRESS

PO Box 1165  
Claremore, OK  
74018

## AFFILIATION TYPE

Independent Organization

## CONTACT

Catherine Woldridge, Director  
(918) 343-1165  
director@uwrmc.org

## PRINCIPAL OFFICER

Catherine Woldridge

## BOARD CHAIR

Julie Adams-Simmons

## SUBJECT AREA

- Foundations
- Nonprofits
- Community service
- Corporate social responsibility
- Adult day care
- Domestic violence shelters
- Housing for people with disabilities
- Group homes
- NTEE Code**  
(Fund Raising Organizations That Cross Categories includes Community Funds/Trusts and Federated Giving Programs)  
e.g. United Way) (T70)

PROGRAMS

1. Meals on Wheels

Population(s) served:
2. DOC Services

Population(s) served:Older adults, Seniors, Economically disadvantaged people, Retired people, Unemployed people, Older adults, Seniors
3. Senior Centers

Population(s) served:
4. Rogers County Adult Day Care

Population(s) served:Seniors, Economically disadvantaged people, Seniors, Economically disadvantaged people
5. Safenet Services Inc

Population(s) served:Adults
6. Williams Barnes Children's Advocacy Center

Population(s) served:Victims of crime and abuse, Victims of crime and abuse, Parents
7. Rogers County Training Center

Population(s) served:Adults, People with disabilities
8. The Manger

Population(s) served:Young adults, Children and youth, Parents, Economically disadvantaged people

POPULATIONS SERVED

1. Economically disadvantaged people
2. At-risk youth
3. Victims of crime and abuse
4. People with physical disabilities
5. People with intellectual disabilities
6. People with learning disabilities
7. People with other disabilities
8. Retired people

COMPLIANCE

- ✓

IRS Pub 78 Verified as of March 2024
- ✓

IRS BMF 509(a) (1) as of March 12, 2024
- ✗

A-133 Audit Required/Performed?
- ✗

Conflict of Interest Policy
- ✗

Written whistleblower policy
- Section 509(a)(1) organization as referred to in Section 170(b)(1)(A)(vi)

TRANSPARENCY MEASURES

- ✓

Board Practices Reported?
- ✗

Diversity Data Reported?
- 12

Number of Independent Board Members

# Programs & Results

## PROGRAMS

Source: Self-Reported by Organization, March 2023

### Meals on Wheels

Population(s) Served: n/a

Deliver meals to Elderly and vulnerable adults in Rogers County

### DOC Services

Population(s) Served: n/a

Senior nutrition and home delivery for needy people in Delaware County.

### Senior Centers

Population(s) Served: n/a

Provide low cost meals and social activities to seniors in several communities

### Rogers County Adult Day Care

Population(s) Served: n/a

They are a community based service benefitting adults with impairments/disabilities and their caregivers

### Safenet Services Inc

Population(s) Served: n/a

Provide a safe, healthy, and supportive environment for individuals and families healing from the consequences of domestic violence, sexual assault and stalking.

### Williams Barnes Children's Advocacy Center

Population(s) Served: n/a

Programs to reduce trauma to child abuse victims

### Rogers County Training Center

Population(s) Served: n/a

Empowering people with disabilities. They provide jobs and job coaches in their recycling center for adults with impairments

### The Manger

Population(s) Served: n/a

They provide free basic necessities for children ages birth – 5 yrs

# Financials

FISCAL YEAR START: 01/01  
FISCAL YEAR END: 12/31

## FINANCIALS QUICK VIEW

|                                     |   |
|-------------------------------------|---|
| Surpluses in last 5 years           | 3 |
| Negative Net Assets in past 5 years | 0 |

## Financial Trends Analysis

### Business Model Indicators

Created in Partnership with



| Profitability                                      | 2018      | 2019      | 2020      | 2021      | 2022      |
|--|-----------|-----------|-----------|-----------|-----------|
| Unrestricted surplus (deficit) before depreciation | \$20,254  | \$15,162  | -\$82,718 | \$23,505  | \$42,181  |
| As a % of expenses                                 | 6.7%      | 4.9%      | -26.0%    | 11.2%     | 14.9%     |
| Unrestricted surplus (deficit) after depreciation  | \$19,925  | \$14,833  | -\$83,047 | \$23,176  | \$41,907  |
| As a % of expenses                                 | 6.6%      | 4.8%      | -26.1%    | 11.0%     | 14.8%     |
| Revenue Composition                                |           |           |           |           |           |
| Total revenue (unrestricted & restricted)          | \$322,636 | \$326,570 | \$235,369 | \$234,117 | \$270,022 |
| Total revenue, % change over prior year            | 0.8%      | 1.2%      | -27.9%    | -0.5%     | 15.3%     |
| Program services revenue                           | 0.0%      | 0.0%      | 0.0%      | 0.0%      | 0.0%      |
| Membership dues                                    | 0.0%      | 0.0%      | 0.0%      | 0.0%      | 0.0%      |
| Investment income                                  | 0.6%      | 0.7%      | 0.3%      | 0.1%      | 0.5%      |
| Government grants                                  | 0.0%      | 0.0%      | 0.0%      | 0.0%      | 0.0%      |
| All other grants and contributions                 | 99.4%     | 99.3%     | 99.7%     | 99.9%     | 99.5%     |
| Other revenue                                      | 0.0%      | 0.0%      | 0.0%      | 0.0%      | 0.0%      |
| Expense Composition                                |           |           |           |           |           |
| Total expenses before depreciation                 | \$302,382 | \$311,408 | \$318,087 | \$210,612 | \$282,841 |
| Total expenses, % change over prior year           | 4.7%      | 3.0%      | 2.1%      | -33.8%    | 34.3%     |
| Personnel  | 17.8%     | 18.0%     | 17.3%     | 26.1%     | 19.0%     |
| Professional Fees                                  | 1.1%      | 1.0%      | 1.0%      | 1.6%      | 1.1%      |
| Occupancy  | 2.9%      | 2.8%      | 2.7%      | 4.2%      | 3.2%      |
| Interest   | 0.0%      | 0.0%      | 0.0%      | 0.0%      | 0.0%      |
| Pass-Through                                       | 0.0%      | 0.0%      | 0.0%      | 0.0%      | 0.0%      |
| All other expenses                                 | 78.2%     | 78.2%     | 78.9%     | 68.1%     | 76.7%     |

# Financial Trends Analysis, continued

## Moving Toward Full Cost Coverage

| Full Cost Components (estimated)    | 2018      | 2019      | 2020      | 2021      | 2022      |
|-------------------------------------|-----------|-----------|-----------|-----------|-----------|
| Total Expenses (after depreciation) | \$302,711 | \$311,737 | \$318,416 | \$210,941 | \$283,115 |
| One Month of Savings                | \$25,199  | \$25,951  | \$26,507  | \$17,551  | \$23,570  |
| Debt Principal Repayment            | \$0       | \$0       | \$0       | \$0       | \$0       |
| Fixed Asset Additions               | \$0       | \$0       | \$0       | \$0       | \$0       |
| Total Full Costs (estimated)        | \$327,910 | \$337,688 | \$344,923 | \$228,492 | \$306,685 |

## Capital Structure Indicators

| Liquidity  |           |           |           |           |           |
|--|-----------|-----------|-----------|-----------|-----------|
| Months of cash                                     | 15.9      | 17.5      | 14.1      | 18.7      | 14.6      |
| Months of cash and investments                     | 15.9      | 17.5      | 14.1      | 18.7      | 14.6      |
| Months of estimated liquid unrestricted net assets | 13.1      | 13.3      | 9.9       | 13.2      | 11.6      |
| Balance Sheet Composition                          |           |           |           |           |           |
| Cash   | \$401,062 | \$454,461 | \$374,384 | \$327,835 | \$343,880 |
| Investments  | \$0       | \$0       | \$0       | \$0       | \$0       |
| Receivables  | \$132,633 | \$121,178 | \$118,307 | \$132,099 | \$123,464 |
| Gross land, buildings, and equipment (LBE)         | \$1,260   | \$931     | \$602     | \$274     | \$0       |
| Accumulated depreciation (% of LBE)                | 0.0%      | 0.0%      | 0.0%      | 0.0%      | 0.0%      |
| Liabilities (as % of assets)                       | 38.5%     | 40.0%     | 46.7%     | 37.9%     | 41.6%     |
| Unrestricted net assets                            | \$331,434 | \$346,267 | \$263,220 | \$231,396 | \$273,303 |
| Temporarily restricted net assets                  | \$0       | N/A       | N/A       | N/A       | N/A       |
| Permanently restricted net assets                  | \$0       | N/A       | N/A       | N/A       | N/A       |
| Total restricted net assets                        | \$0       | \$0       | \$0       | \$55,000  | \$0       |
| Total net assets                                   | \$331,434 | \$346,267 | \$263,220 | \$286,396 | \$273,303 |

## Key Data Checks

| Material Data Errors | 2018 | 2019 | 2020 | 2021 | 2022 |
|----------------------|------|------|------|------|------|
|                      | No   | No   | No   | No   | No   |

Note: This issue is relevant to a small number of organizations: The nonprofit subject(s) of this report may have affiliates. The Form 990 data may not include information about any or all potential affiliates. If an organization does have affiliates and these affiliates have substantial financial activity, the financial data in this report may not present a comprehensive picture of the nonprofit's financial condition.Please consult the 990s of any potentially related affiliates for additional information.

- ☒ [Formulas for key metrics](#)
- ☒ ['Key Revenue & Expense Data from Form 990'](#)
- ☒ ['Key Balance Sheet Data from Form 990'](#)

# Operations

Source: Self-Reported by Organization, March 2023

## NUMBER OF EMPLOYEES

Source: IRS Form 990



## PRINCIPAL OFFICER

Mrs. Catherine Woldridge

## BOARD CHAIR

Julie Adams-Simmons

## BOARD MEMBERS

- Dwight Nadal
- Cherri Pilkington
- Brad Ward
- Daniel Marangoni
- Matthew Babbitt
- Delayna Trease
- Amber Brassfield
- Stan Brown
- Brandy Rowe
- Ryan Neely
- Richard Willhour
- Amy Roberts

OFFICERS, DIRECTORS, TRUSTEES, AND KEY EMPLOYEES

FISCAL YEAR 2022

| Name            | Title        | Compensation | Other | Related |
|-----------------|--------------|--------------|-------|---------|
| Jody Webb       | DIRECTOR     | \$0          | \$0   | \$0     |
| Allison Saare   | VICE PRES/TR | \$0          | \$0   | \$0     |
| Alisha Smith    | PRESIDENT    | \$0          | \$0   | \$0     |
| Lance Swift     | DIRECTOR     | \$0          | \$0   | \$0     |
| Courtney Castle | DIRECTOR     | \$0          | \$0   | \$0     |
| Wendy Wooty     | DIRECTOR     | \$0          | \$0   | \$0     |
| Shelly Haire    | DIRECTOR     | \$0          | \$0   | \$0     |
| Chris Williams  | DIRECTOR     | \$0          | \$0   | \$0     |
| Brandy Rowe     | DIRECTOR     | \$0          | \$0   | \$0     |
| Sandra Sorber   | DIRECTOR     | \$0          | \$0   | \$0     |
| Beth Moore      | DIRECTOR     | \$0          | \$0   | \$0     |



OFFICERS, DIRECTORS, TRUSTEES, AND KEY EMPLOYEES

FISCAL YEAR 2021

| Name             | Title        | Compensation | Other | Related |
|------------------|--------------|--------------|-------|---------|
| Jody Webb        | DIRECTOR     | \$0          | \$0   | \$0     |
| Allison Saare    | VICE PRES/TR | \$0          | \$0   | \$0     |
| Alisha Smith     | PRESIDENT    | \$0          | \$0   | \$0     |
| Lance Swift      | DIRECTOR     | \$0          | \$0   | \$0     |
| Courtney Castle  | DIRECTOR     | \$0          | \$0   | \$0     |
| Cody Williams    | DIRECTOR     | \$0          | \$0   | \$0     |
| Wendy Wooty      | DIRECTOR     | \$0          | \$0   | \$0     |
| Katie Thibodeaux | DIRECTOR     | \$0          | \$0   | \$0     |
| Nikki Ward       | DIRECTOR     | \$0          | \$0   | \$0     |
| Shelly Haire     | DIRECTOR     | \$0          | \$0   | \$0     |
| Chris Williams   | DIRECTOR     | \$0          | \$0   | \$0     |
| Brandy Rowe      | DIRECTOR     | \$0          | \$0   | \$0     |

OFFICERS, DIRECTORS, TRUSTEES, AND KEY EMPLOYEES

FISCAL YEAR 2020

| Name             | Title        | Compensation | Other | Related |
|------------------|--------------|--------------|-------|---------|
| Jody Webb        | DIRECTOR     | \$0          | \$0   | \$0     |
| Jeff Kolker      | DIRECTOR     | \$0          | \$0   | \$0     |
| Kesha Gray       | DIRECTOR     | \$0          | \$0   | \$0     |
| Brandy Rowe      | DIRECTOR     | \$0          | \$0   | \$0     |
| Allison Saare    | VICE PRES/TR | \$0          | \$0   | \$0     |
| Alisha Smith     | PRESIDENT    | \$0          | \$0   | \$0     |
| Lance Swift      | DIRECTOR     | \$0          | \$0   | \$0     |
| Courtney Castle  | DIRECTOR     | \$0          | \$0   | \$0     |
| Cody Williams    | DIRECTOR     | \$0          | \$0   | \$0     |
| Wendy Wooty      | DIRECTOR     | \$0          | \$0   | \$0     |
| Katie Thibodeaux | DIRECTOR     | \$0          | \$0   | \$0     |
| Ashley Ward      | DIRECTOR     | \$0          | \$0   | \$0     |

OFFICERS, DIRECTORS, TRUSTEES, AND KEY EMPLOYEES

FISCAL YEAR 2019

| Name            | Title        | Compensation | Other | Related |
|-----------------|--------------|--------------|-------|---------|
| Jody Webb       | DIRECTOR     | \$0          | \$0   | \$0     |
| Gladys Ball     | DIRECTOR     | \$0          | \$0   | \$0     |
| Jeff Kolker     | DIRECTOR     | \$0          | \$0   | \$0     |
| Kesha Gray      | DIRECTOR     | \$0          | \$0   | \$0     |
| Grant Gingerich | PRESIDENT    | \$0          | \$0   | \$0     |
| Brandy Rowe     | DIRECTOR     | \$0          | \$0   | \$0     |
| Allison Saare   | TREASURER    | \$0          | \$0   | \$0     |
| Kellie Kuhn     | DIRECTOR     | \$0          | \$0   | \$0     |
| Alisha Smith    | VICE PRESIDE | \$0          | \$0   | \$0     |
| Toby Miles      | DIRECTOR     | \$0          | \$0   | \$0     |

OFFICERS, DIRECTORS, TRUSTEES, AND KEY EMPLOYEES

FISCAL YEAR 2018

| Name              | Title        | Compensation | Other | Related |
|-------------------|--------------|--------------|-------|---------|
| Jody Webb         | DIRECTOR     | \$0          | \$0   | \$0     |
| Kesha Gray        | DIRECTOR     | \$0          | \$0   | \$0     |
| Gladys Ball       | DIRECTOR     | \$0          | \$0   | \$0     |
| Jeff Kolker       | DIRECTOR     | \$0          | \$0   | \$0     |
| Daniel Marangoni  | PRESIDENT    | \$0          | \$0   | \$0     |
| Jacqueline Rhodes | DIRECTOR     | \$0          | \$0   | \$0     |
| Grant Gingerich   | DIRECTOR     | \$0          | \$0   | \$0     |
| Patricia Martin   | DIRECTOR     | \$0          | \$0   | \$0     |
| Allison Saare     | DIRECTOR     | \$0          | \$0   | \$0     |
| Kellie Kuhn       | DIRECTOR     | \$0          | \$0   | \$0     |
| Alisha Smith      | VICE PRESIDE | \$0          | \$0   | \$0     |
| Toby Miles        | DIRECTOR     | \$0          | \$0   | \$0     |

HIGHEST PAID EMPLOYEES

FISCAL YEAR 2020

| Name                | Title        | Compensation | Other | Related  |
|---------------------|--------------|--------------|-------|----------|
| Catherine Woldridge | EXECUTIVE DI | \$51,200     | \$0   | \$51,200 |

**Paid Preparers**  
FISCAL YEAR 2022

| Firm Name                 | Firm EIN  | Firm Address                         | Firm Phone |
|---------------------------|-----------|--------------------------------------|------------|
| HOOD & ASSOCIATES CPAS PC | 731432162 | 323 W 1ST ST, CLAREMORE OK 740178005 | 9187477000 |

**Paid Preparers**  
FISCAL YEAR 2021

| Firm Name                 | Firm EIN  | Firm Address                         | Firm Phone |
|---------------------------|-----------|--------------------------------------|------------|
| HOOD & ASSOCIATES CPAS PC | 731432162 | 323 W 1ST ST, CLAREMORE OK 740178005 | 9187477000 |

**Paid Preparers**  
FISCAL YEAR 2020

| Firm Name                 | Firm EIN  | Firm Address                                   | Firm Phone |
|---------------------------|-----------|--|------------|
| HOOD & ASSOCIATES CPAS PC | 731432162 | 1821 SE WASHINGTON BLVD, BARTLESVILLE OK 74066 | 9187477000 |

BOARD LEADERSHIP PRACTICES

GuideStar worked with BoardSource, the national leader in nonprofit board leadership and governance, to create this section, which enables organizations and donors to transparently share information about essential board leadership practices.

BOARD ORIENTATION & EDUCATION

Does the board conduct a formal orientation for new board members and require all board members to sign a written agreement regarding their roles, responsibilities, and expectations?

No

CEO OVERSIGHT

Has the board conducted a formal, written assessment of the chief executive within the past year?

No

ETHICS & TRANSPARENCY

Have the board and senior staff reviewed the conflict-of-interest policy and completed and signed disclosure statements in the past year?

No

BOARD COMPOSITION

Does the board ensure an inclusive board member recruitment process that results in diversity of thought and leadership?

No

BOARD PERFORMANCE

Has the board conducted a formal, written self-assessment of its performance within the past three years?

No

## Organizational Demographics

Who works and leads organizations that serve our diverse communities? This organization has voluntarily shared information to answer this important question and to support sector-wide learning. GuideStar partnered on this section with CHANGE Philanthropy and Equity in the Center.

### Leadership

*The organization's leader identifies as:*  
*No data*

### Race & Ethnicity

*No data*

### Gender Identity

#### Transgender Identity

*No data*

### Sexual Orientation

*No data*

### Disability

*No data.*



# Appendix

Key Documents

|                              |  |
|------------------------------|--|
| IRS Forms 990                | <a href="#">2022 990</a>                                       |
|                              | <a href="#">2021 990</a>                                       |
|                              | <a href="#">2020 990</a>                                       |
|                              | <a href="#">2019 990</a>                                       |
|                              | <a href="#">2018 990</a>                                       |
| IRS Forms 990T               | Not Available  |
| Audited Financial Statements | <a href="#">2012 Audited Financial Statement</a>               |
| Key Organization Documents   | <a href="#">Letter of Determination</a>                        |
|                              | <a href="#">'Key Revenue &amp; Expense Data from Form 990'</a> |
|                              | <a href="#">'Key Balance Sheet Data from Form 990'</a>         |

UNITED WAY OF ROGERS AND MAYES COUNTIES INC

PO Box 1165  
Claremore, OK 74018

✓ Foundation Status Code: PC\*

✓ Public charity described in section 509(a)(1) or (2)

| IRS Publication 78 Details                   |  |   | <div>✓ IRS Pub 78 verified</div> |
|--|--|---|----------------------------------|
| Organization name                            | Location   | Most recent IRS Publication 78                      |                                  |
| United Way of Rogers and Mayes Counties Inc. | Claremore, OK                                    | March 2024  |                                  |
| EIN  | <u>Deductibility status description</u>          | Verified with most recent Internal Revenue Bulletin |                                  |
| 73-1249045                                   | A public charity (50% deductibility limitation). | March 25, 2024                                      |                                  |

| IRS Business Master File Details  |  |   | IRS BMF | 509(a)(1) |
|---|--|---|---------|-----------|
| Organization name   | Most recent IRS BMF                                    | Reason for Non-Private Foundation Status                                  |         |           |
| UNITED WAY OF ROGERS AND MAYES COUNTIES INC   | March 12 2024  | Section 509(a)(1) organization as referred to in Section 170(b)(1)(A)(vi) |         |           |
| EIN   | IRS subsection   | Ruling date   |         |           |
| 73-1249045  | This organization is a <u>501(c)(3) Public Charity</u> | 08/1987   |         |           |
| This organization was not included in the Office of Foreign Assets Control Specially Designated Nationals (SDN) list. |  |   |         |           |

On September 8, 2011, the IRS issued regulations which eliminated the advance ruling process for a section 501(c)(3) organization. [Learn more](#)

\* The Foundation Status Code is the code that foundations are required to provide for each grantee annually on part XV of Form 990PF. Note that this code cannot be derived in some cases (e.g., supporting organizations for which 'type' can't be determined).

IRS Revenue Procedure 2011-33 allows grantors to rely on third-party resources, such as GuideStar Charity Check, to obtain required Business Master File (BMF) data concerning a potential grantee's public charity classification under section 509 (a) (1), (2) or (3).

GuideStar Charity Check Data Sources

- GuideStar acquires all IRS data directly from the Internal Revenue Service.

-The IRS Publication 78 (Cumulative List of Organizations) lists organizations that have been recognized by the Internal Revenue Service as eligible to receive tax-deductible contributions.

-The IRS Internal Revenue Bulletin (IRB) lists changes in charitable status since the last Publication 78 release. Between the release of IRS Publication 78 and the subsequent IRS Internal Revenue Bulletin, the IRB date will reflect the most recent release date of IRS Publication 78.

-The IRS Business Master File lists approximately 1.7 million nonprofits registered with the IRS as tax-exempt organizations.
- The IRS Automatic Revocation of Exemption List contains organizations that have had their federal tax-exempt status automatically revoked for failing to file an annual return or notice with the IRS for three consecutive years.

-The Foundation Status Code is a value derived by mapping the codes found on the 990PF filing instructions to the corresponding codes in the IRS BMF. Note that not all codes are able to be mapped due to insufficient data.

-The Office of Foreign Assets Control (OFAC) Specially Designated Nationals (SDN) list organizations that are owned or controlled by targeted individuals, groups, and entities, such as terrorists or narcotics traffickers. Their assets are blocked and U.S. persons are generally prohibited from dealing with them.