



2002
ANNUAL REPORT

IDA-ORE PLANNING & DEVELOPMENT ASSOC., INC.
dba SAGE COMMUNITY RESOURCES

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IDA-ORE PLANNING & DEVELOPMENT ASSOC., INC.
dba SAGE COMMUNITY RESOURCES

SAGE COMMUNITY RESOURCES

Introduction

IDA-ORE Planning and Development Association, Inc., dba Sage Community Resources, is a 501-C3 charitable nonprofit development company created for the benefit of communities located in the 10 counties of Southwest Idaho.

Sage Community Resources is a nonprofit development organization providing assistance and resources for communities in southwest Idaho to enhance their quality of life through collaborative leadership.

A Note From The Director

“Opportunities are usually disguised by hard work, so most people don’t recognize them” – Ann Landers

The past year has presented some real challenges on many levels. Nationally, the events of last September and ensuing months tested our resilience, yet renewed our patriotism. In Idaho, the economic downturn and resultant impact on state resources necessitated increased efficiencies, creative approaches, and hard choices. Internally, Sage Community Resources was not without significant challenges of our own.

Upon reflection, there were considerable successes, many of which are outlined in this report. The dedicated team of professionals at Sage Community Resources work hard to serve the ten western Idaho counties. As the new Executive Director, I am looking forward to helping shape a broader strategic direction for Sage, so that we may continue to meet the needs of our member communities well into the future.

Helping create a positive economic and community impact is what we do... thank you for the opportunity to be of service!

- Kathleen Simko, Executive Director

TO THE STAKEHOLDERS

The President's Report

During this past year, the pursuit of an Executive Director was the priority of the Board. Board discussions to address this and other issues required increased involvement by our Directors. There were many challenging exchanges of ideas with the resulting decisions making us a stronger organization. Through this process, we have become better acquainted with staff's job responsibilities, their professionalism, and their sincere desire to support Sage and the communities we serve. The Board has implemented a number of changes: from policy changes in our Bylaws to procedural changes in the agendas for the Executive Committee meetings.

Our hiring of Kathleen Simko as Executive Director has proved to be a sound decision. Her experience, vision, and energy have already contributed to Sage as she shapes the operational direction of our organization.

During this year, we said good-bye to a couple of our oldest programs: Employment and Training, operating out of our Weiser office, and Retirement Jobs of Idaho at our One Stop Career Center in Boise. This change was precipitated by a new State policy restricting organizations such as ours from acting as both program service provider and program administrator. While this was a difficult decision to make, our Board firmly believes that local oversight is essential for our region's Workforce Investment Program as well as other programs, such as the Area Agency on Aging.

This year we experienced tremendous success in our Planning department. One accomplishment was that 8 of 11 ICDBG's awarded to this region were submitted by Sage staff.

Please take a few minutes and review the comments prepared by our various departments in the following pages. I wish to acknowledge and thank the staff and fellow Board members for their participation, encouragement, and support during this exciting year.



Rich Hahn
President

MANAGEMENT

Administration & Finance

As with all the departments, administrative changes were significant over the past year.

IDA-ORE upgraded the technical capabilities in the Weiser and Boise offices. Weiser received a new file server and Team Internet system with remote accessibility to better assist staff with their numerous projects in the rural communities. Now staff can access their files whenever needed. The Boise office upgraded their network system for the first time in nine years to a Microsoft 2000 based system. Hardware for the server was purchased to handle the considerable needs of the staff. These desperately needed upgrades will enable us to handle growth for the next five years.

Along with technical changes, personnel was expanded to better serve clients and staff. The expansion was required to insure we continue to provide the support needed, as a result of new programs and a 10% increase in staffing. We are now, more capable of addressing the needs of our clients, vendors and staff.

Our goal is to become “invisible”. We believe that the more efficient this department is, the more the other departments of IDA-ORE can concentrate on serving the needs of our communities.

TO A JOB WELL DONE

Special Recognition

It is with deep appreciation and gratitude that the Sage Community Resources Board of Directors recognizes the contributions of John Robert “Bob” Barber for his tireless devotion to the organization in serving as the Interim Executive Director for the 2000/01 year. A ship without a rudder floats aimlessly amid the rough sea. Thank you Bob for helping us steer the vessel to calmer waters.

SMALL BUSINESS

Business Development

Providing a new path to success for those seeking self-sufficiency through entrepreneurship

This year Business Development (BD) provided resources and support to individuals and assisted community partners meet their roles of providing services to the communities of southwest Idaho.

BD stepped up to the plate when their long time partner the Women's Business Center (WBC) found themselves in need of space, staff and counselors. By providing space in the Sage Boise office and staff services the WBC was able to restructure and remain open as a valuable resource to women business owners.

BD assisted two new community resources with business plan preparation for presentation to private funding sources. Funding was received for one and the second will be funded next year. Conducting the first "La Placita Marketplace" during Fiesta Idaho in Nampa, provided 22 vendors with training in customer service and legal requirements for starting a business. In addition Business Development assisted the HCCI complete their initial business plan for presentation to the US Economic Development Administration, with funding acquired.

BD will continue to provide services to the low, very-low income and minority constituents of southwest Idaho. We will provide business training, technical assistance and micro-finance programs for the Hispanic business community and others with unique circumstances that see entrepreneurship as a means to attaining self-sufficiency.

MILESTONES

- √ Counseling Sessions **163**
- √ **196** Individuals Served
- √ **2** Hispanic Business Conferences
- √ Bilingual Web-Site
- √ **3** Funding Resource Presentations (2 out of state)
- √ Training Classes **14**
- √ **7** Business Plans Completed
- √ 2001 Hispanic Business Directory
- √ **2** Hispanic Business Workshops
- √ **1** Partner Organization Planning Facilitation
- √ **7** Bilingual Training Classes
- √ Assistance to **18** Hispanic College Students
- √ Hispanic MicroLoan Fund
- √ **2** Community Partner Grants Written & Funded
- √ Women's Trade Show **1**
- √ Sponsor- Minority Entrepreneurship of the year for SBA
- √ Κομμουνιτυ Bank Supported Events **7**

Small Business Administration - PRIME Program

- √ Cash match from 3 Local Banks, Fund for Folk Culture
- √ In-Kind from Private Hispanic Business Association Members

BUSINESS LOANS

Development Finance

The events of September 11th negatively impacted an already weakening economy and greatly reduced the ability of small business to see beyond the horizon.

During the first half of this fiscal year, caution became more than just a word. New loan applications withered and, with a heightened desire not to facilitate failure, applicant scrutiny increased. Extra time and effort was also devoted to working with existing borrowers to assure their financial stability.

Though not all of the positive results can be quantified, it is important to report that delinquencies have not increased and the recovery of non-earning assets exceeded \$200,000. This was done in spite of SBA's 40% reduction in Technical Assistance Grants, which dropped from 25% of the balance owed SBA to 15%.

Currently, the department's portfolio has 81 loans with balances averaging \$36,436 for a total of \$2,951,316. Other than borrower payments available for re-lending, the department's pool of loanable funds was only increased by a new \$100,000 loan from the SBA.

The department is grateful for the invaluable assistance rendered by the following Sage Directors who served on the Development Finance Committee: **Dale Williamson**, Mayor of New Plymouth and Sage's Vice President for Development Finance; **Hal Tolmie**, Owyhee County Commissioner; **Joanne Lanham**, Glens Ferry Councilwoman, **Ron Morgan**, Mayor of Emmett; **Bill Brown**, Adams County Commissioner; **Eric Randall**, US Bank; **Dan Noble**, Zions Bank.

Thanks to **Dave Jett**, Mayor of Mountain Home and Sage's First Vice-President, the *Mountain Home News* ran a 12-week series of articles by Mark Devine on ways for small businesses to improve their operations. Copies are available on request.

ECONOMIC DEVELOPMENT

Planning

DEVELOPMENT PARTNERSHIPS

Sage staff continues to partner with local, state and federal leadership in the implementation of EDA, ICDBG, RCBG, USDA, HUD and Federal Highway Administration programs. Sage promotes local capacity building through partnerships with local economic development staff and promotion of local development organizations and activities.

ECONOMIC DEVELOPMENT

Economic Diversification strategies are nearing completion in Adams, Elmore, Gem, Owyhee, Valley, and Washington counties, providing a prioritized focus on development alternatives. EDA funding of the Hispanic Job Training Center in Canyon County promotes economic opportunity of Hispanic citizens throughout Idaho.



The Payette River Scenic Byway was awarded National Scenic Byway status, bringing increased awareness and potential funding opportunities.

COMMUNITY DEVELOPMENT

Upgrading water and sewer facilities remains a top priority to create vital communities. Currently, all areas of the region are being served through grant administrative services. Community and Senior Centers serve community gathering and support needs, often becoming the heart of a community. Centers and center expansions funded through Sage's assistance are becoming a reality in Marsing, Star and Centerville.

GRANT ASSISTANCE PROVIDED

Ada County

Star Senior Center Rehabilitation
Kuna Industrial Park

Adams County

New Meadows Depot
Restoration and Community Center

Boise County

Lowman Fire Station
Centerville Community Center

Canyon County

City of Caldwell - Economic Adjustment Strategy for Indian Creek Area
Hispanic Cultural Center
City of Greenleaf Water System Improvement

Elmore County

High Desert Economic Adjustment Strategy

Gem County

Ola Fire Station
Water System Improvement

Owyhee County

High Desert Economic Adjustment Strategy

Payette County

Ethanol Feasibility Study

Valley County

Disaster Assistance

Washington County

City of Weiser Water Treatment Plant

Regionwide

EDA Planning Grant
Scenic Byway Corridor Management
4 County Economic Adjustment Strategies

\$2.5 Million
Awarded/Pending

OLDER AMERICANS

Southwest Idaho Area Agency on Aging

Vision

To enhance the quality of life and maintain independence for elders in Southwest Idaho.

Mission

The Southwest Idaho Area Agency on Aging strives to secure, promote, and provide essential services to enhance the quality of life for elders in a diverse and changing society. We meet this challenge through advocacy, coordination, building alliances, and promoting public awareness, guided by integrity, vision, and sustained commitment.

Challenges Faced

The Area Agency on Aging Strategic Plan had to be written, approved and published. This was completed and will be the Golden Rule for the next four-year period, January 1, 2002 to December 31, 2006.

Services to be served in the Southwest Idaho Area Agency on Aging had to be put out for bid. This process was completed and the contracts have been written and signed.

Successes and Achievements

We plan to develop a mobile adult day care program in seven of our most rural counties. The vehicle will be handicapped accessible and able to pick up clients and transport them to several central adult day care sites to allow their caregivers some temporary relief. Mobile day care is an innovative approach to providing respite services in rural communities. Rural communities may not have the resources to develop their own day care program. The program staff will leave from a central location each morning and travel to a rural site. Depending on the individual needs of the community, respite day care may be provided one day each week or every other week for six hours a day. The respite/daycare will be held in a community building, preferably the local senior center. This mobile respite/daycare allows rural communities to have their own program by sharing staff and resources. This mobile program will be modeled on the successful pilot program developed in Wickenburg, Arizona.

WORKFORCE INVESTMENT

WorkSOURCE Administrative Office

Mission

WorkSOURCE, An IdahoWorksSM Board, is business-driven and directed to provide employers with a skilled and committed workforce to meet long-term, evolving employment needs in Southwest Idaho.

Quick Bytes

- Developed Quarterly Reporting publication.
- *2 Weeks In Advance*, Informational newsletter for Board members.
- Quarterly Newsletter for Youth Council of southwest Idaho.
- Awarded grant from US Dept. of Labor to better serve business needs with WIA.
- Susan Choate hired as Programs Manager.
- Increased participation of Partners through Memorandums of Understanding.
- National recognition for Youth Construction program developed by the Association of General Contractors (AGC) & WorkSOURCE provider, Workforce Essentials.

Leadership

The past year was an election year in which Kathy Hagler, of AGC Educational Foundation, and Cliff Olson of Idaho Power were elected as Chair and Vice Chair of the WorkSOURCE Board.

Their election brought about change that included the implementation of the strategic plan and the development of a quarterly reporting process for the Board. The plan has enabled committees of the Board to be more effective in the goals of continuous improvement and partnering.

Serving Business

Recognizing that our mission is to make a difference in meeting the workforce needs of our regional businesses, we have begun to focus on our business connections.

To enhance the process we sought and were awarded a grant to develop a process to better meet business needs. We continue to seek funding to assist us in meeting businesses employment and training needs.

2001-2002 Performance

Based on the most recent figures (7/1/01 to 6/30/02), WorkSOURCE, the IdahoWorks Career Center System for southwest Idaho provided extended services to:

306	Youth (14 to 21)	133% of goal
293	Adults	147% of goal
757	Dislocated Workers	125% of goal

STATEMENT OF Financial Activity

IDA-ORE PLANNING AND DEVELOPMENT ASSOCIATION, INC.
STATEMENT OF ACTIVITIES AND CHANGES IN NET ASSETS
YEAR ENDED SEPTEMBER 30, 2001

REVENUE AND SUPPORT:		
Federal and state grants	\$	4,555,543
Revenues		471,156
Interest		<u>281,611</u>
Total Revenue and Support		<u>5,308,310</u>
EXPENSES:		
Program expenses		5,259,697
Interest expense		97,995
Depreciation		<u>36,252</u>
Total Expenses		<u>5,393,944</u>
DEFICIENCY OF REVENUES AND SUPPORT OVER EXPENSES		<u>(85,634)</u>
NET ASSETS, October 1, 2000, as previously stated		1,588,465
PRIOR PERIOD ADJUSTMENT		<u>198,376</u>
NET ASSETS, September 20, 2001	\$	<u><u>1,701,207</u></u>

STATEMENT OF Financial Position

IDA-ORE PLANNING AND DEVELOPMENT ASSOCIATION, INC.
STATEMENT OF FINANCIAL POSITION
SEPTEMBER 30, 2001

ASSETS

CURRENT ASSETS:	
Cash in bank - unrestricted	\$ 6,904
Cash in bank - restricted	1,351,664
Receivables:	
Grants and contracts, no allowance for doubtful accounts considered necessary	1,363,054
Loans, net of allowance for doubtful accounts of \$129,692	1,703,106
Interest Receivable	21,255
Prepaid Expenses	1,537
Total Current Assets	4,447,520
EQUIPMENT AND FURNITURE, at cost	
Less accumulated depreciation	149,720 117,196
Equipment & Furniture, net	32,524
TOTAL ASSETS	\$ 4,480,044

LIABILITIES AND NET ASSETS

CURRENT LIABILITIES:	
Accounts payable	\$ 853,764
Accrued payroll liabilities	40,612
Refundable advances	430,765
Security Deposits	7,743
Current portion, notes payable	67,987
Total Current Liabilities	1,400,871
NOTES PAYABLE, less amounts classified as current liabilities	1,377,966
NET ASSETS - Unrestricted	1,701,207
TOTAL LIABILITIES AND NET ASSETS	\$ 4,480,044

BOARD OF DIRECTORS

Our Leaders

OFFICERS

PRESIDENT	Rich Hahn
PAST PRESIDENT	Garret Nancolas
VICE PRESIDENT	Dave Jett
SECRETARY/TREASURER	John G. Evans

COMMITTEES

VP, Workforce Development	Tom Kerr
VP, State Affairs	Diana Thomas
VP, Economic Development	Dave Jett
VP, Development Finance	Dale Williamson
VP, Older Americans Program	Kathy Skippen

MEMBERS

Ada	John G. Evans		
Adams	Bill Brown		
Boise	Elaine Baker	John S. Foard	
Canyon	Tom Dale	Todd Lakey	Garret Nancolas
Elmore	Dave Jett	Joanne Lanham	Craig McCurry
Gem	Ron Morgan	Kathy Skippen	
Owyhee	Harold Puri	Hal Tolmie	
Payette	Dennis Codr	Dale Williamson	
Valley	Marilyn Arp	Tom Kerr	
Washington	Don Stephens	Diana Thomas	
Minority Representatives			
	Sam Byrd	Humberto Fuentes	Kirby Ortiz
Members At-Large			
	Rich Hahn	Dan Noble	Eric Randall
	Dr. Jim Weatherby		

C = Chair
VC = Vice Chair

Southwest Idaho Area Agency on Aging Council Members

Lauana Amidon	Jack Jones	Betty Simpson
Kenny Averill	Lura Knudsen	Kathy Skippen
Ken Azbill	Mary Mahler	Mims Smallwood
Alfredo Balderas	Leo Malone	Angela Spain
Karen Clark	Lois Meserole	Jessie Stelling
Pam Compton	Chuck Monger C	Hal Tolmie
Pat Enright	Lawrence Myers	Erma Udlinek
Caryl Fausett VC	Elizabeth O'Neill	George Walborn
Dorothy Grasmick	Vivian Owens	Jonita Wertz
Steve Helm	Don Riffin	Carole Wiley
Mary Hickman	Goldie Sankey	Robin Young
Jess Hulit	Euel Sevier	Karen Zink

WorkSOURCE, an IdahoWorks Board of Directors

Linda Alden	Wayne Frieders	Anthony Marshall
Robert Aldridge	Donna Grummer	Holly Mercer
Dana Ard	Manuel Guerra	Paul McFarland
Dr. Larry Barnhardt	Kathy Hagler C	Jim Mowbray
Susan Berning	Andy Hedden-Nicely	Cliff Olson VC
Marc Bensen	Sherry Hendricks	Darrell Quist
Shirl Boyce	Deni Hoehne	Bob Swenson
Bill Brewer	Rick Jackson	Jan Taylor
Sam Byrd	Larry Koomler	Steve Tencich
Paul Carroll	Todd Lakey	Kathy York
Dr. Edward Davis	Brian Langley	

SAGE DIRECTORS

Executive Director Kathleen Simko
Administration & Finance Jim Gruber
Business Development Alice Whitney
Development Finance Bob Richards
Southwest Idaho Area Agency on Aging Brenton Sempreviva
Planning Shawn Charters
WorkSOURCE Bob Barber

SAGE AWARDS 2002

Roy Watson, Sr. Award VOLUNTARY SERVICE

Sage Community Resources has dedicated this annual award in recognition of the devotion to voluntary community service on behalf of the expansion of programs for improved conditions for the elderly of southwest Idaho. This year's recipients of the Roy Watson Award for Voluntary Service are Helen and Henry Rohlfing of New Plymouth.

Helen and Henry Rohlfing have revolved their personal life around the local seniors and all their needs for the last 19 years that Helen has served as Coordinator at the New Plymouth Senior Center. In their seventies, and still working a number of 12-hour days, they keep the Center running smoothly and flawlessly. Due to Helen's managerial skills the Center is known for its high degree of excellence.

If asked to describe Helen and Henry in a few words it would be dedicated, devoted, loyal and unselfish. They are a couple dedicated to others through thoughtful compassion.

SAGE AWARDS 2002

Kay Larson Award

DEDICATION TO THE WORKFORCE

Clifford N. Olson is **Vice President of Corporate Services for Idaho Power**. As Vice President, Corporate Services, his responsibilities include Procurement, Real Property Management, Fleet Services, Administrative Resources and Hazardous Materials & Health Services.

Cliff has been with Idaho Power since 1972 when he began his career as a junior engineer. He has served in various engineering and operations assignments including substation transmission, generation and distribution activities. Olson also served as assistant electrical superintendent and electrical superintendent in the company's Western Division. He became general manager of engineering in 1989, then advanced to senior manager of Information Services and, in 1992, to Vice President, Corporate Services.

The Kay Larson Award is presented annually to an individual in recognition of the devotion to voluntary community service on behalf of the continuous improvement of regional workforce development systems. Cliff's dedicated service to the Work SOURCE, an *IdahoWorks* Board of more than 3 years has awarded him this honor.



SAGE AWARDS 2002

Dr. Robert K. Wood Award VOLUNTARY SERVICE



The Adams County Historical Society (ACHS) has been chosen as the recipient of the Dr. Robert K. Wood Award. The ACHS embodies the vision and commitment of a non-profit volunteer organization in the pursuit of community and economic development activities that are targeted to improve the quality of life in their community.

ACHS was established in 1978 and is a non-profit organization that is comprised of an eight member Board of Directors. They serve as caretakers for the Pacific and Idaho Northern (PIN) Railroad Depot located in New Meadows, Idaho. The PIN Depot is a landmark structure within the community and, in addition to its historical significance; the Depot holds important community and economic development potential for New Meadows. ACHS has recognized this fact for years and has steadily maintained the focus of their voluntary efforts on the preservation and restoration of this facility. Aside from their other resource development activities, to date, ACHS has sought and received three major grants that total \$890,646. These grant funds coupled with local matching cash and in-kind resources will provide the financing needed to complete the restoration of the PIN Depot.

Their tireless effort to maintain their vision, and to seek and obtain the funding needed to complete this large and complex rehabilitation project is no less than a Herculean task for this small rural volunteer organization.

THANK YOU ALL

Partners/Supporters

We appreciate all of the agencies and individuals who continue to support our organization and apologize if we inadvertently left anyone out.

AGC Educational Foundation
Bank of America
Boise Cascade
BSU, Selland College of Applied Technology
City & County Governments
Chambers of Commerce
Easter Seals/Goodwill
Fund for Folk Culture
Gene Strate Real Estate
Health & Welfare
Hispanic Business Association
Hispanic Cultural Center of Idaho, Inc.
Humphreys Diabetes Education Center
Idaho Department of Labor & Job Service
Idaho Commission for the Blind
Idaho Commission on Aging
Idaho Migrant Council
Idaho Power
Job Corps
Key Bank
Local Civic & Economic Development Organizations
Midland Health & Rehab Center
Multi-Care Home Health
Premiere Financial Planning, Hal Rumsey
Private Industry Council
State & Federal Funding Agencies including:
IDOC, EDA, USDA & ITD
State Workforce Development Council
TLC Home Health
US Bank
US Small Business Administration
Vocational Rehabilitation
Wells Fargo Bank
Women's Business Center

SOUTHWEST IDAHO

Office Locations

BOISE

Headquarters
10624 W. Executive Drive
Boise, Idaho 83713
208.322.7033 or
800.859.0321

WorkSOURCE
Career Center*
1001 S. Orchard St.
Boise, Idaho 83705
208.323.5627
**Administration Office at
Sage Headquarters.*

CALDWELL

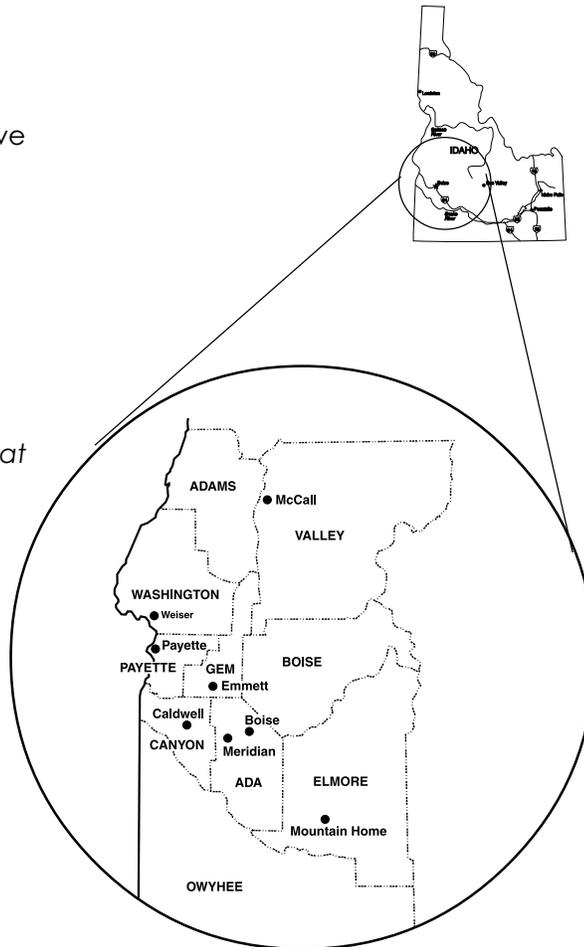
811 Main Street
Caldwell, Idaho 83605
208.454.9661 or
800.657.4021

McCALL

P.O. Box 2055
321 North 3rd
McCall, Idaho 83638
208.634.4287

WEISER

P.O. Box 311
25 W. Weiser
Weiser, Idaho 83672
208.549.2411 or
800.859.0324



Sage Community
Resources
Regionally Inclined



SAGE COMMUNITY RESOURCES
10624 W. EXECUTIVE DR.
BOISE, IDAHO 83713
T 208.322.7033 or 1.800.859.0321

www.sageidaho.com

Sage Community Resources is an Equal Opportunity/Affirmative Action employer.
Auxiliary aids and services available upon request for individuals with disabilities.
Idaho Relay Services numbers: TDD 1.800.377.3529 or VOICE 1.800.377.1363.

Sage Community Resources has made every effort to keep the information in this publication accurate.