

CHANGE.
NOT CHARITY.

2012 ANNUAL REPORT

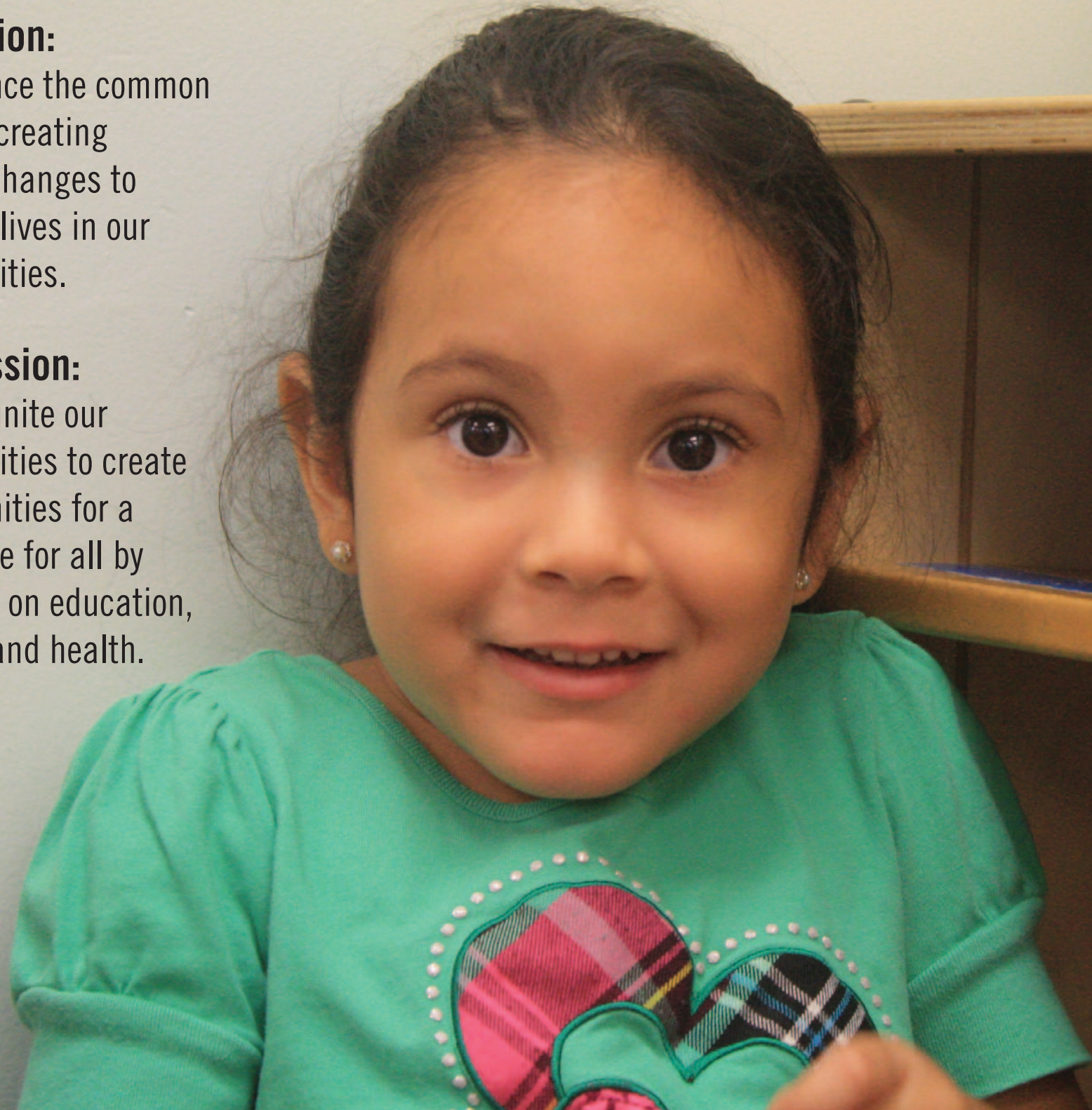


Our Vision:

To advance the common good by creating lasting changes to improve lives in our communities.

Our Mission:

We will unite our communities to create opportunities for a better life for all by focusing on education, income and health.



In order to achieve our Vision & Mission, we concentrate on a two-pronged approach:

- 1) "Community-Level Work" – United Way impacts the community through initiatives and programs that focus on the building blocks of a good life for all – Education, Income & Health.**
- 2) "On-the-Ground Work" – We support programs at local non-profit organizations that also focus on Education, Income and Health and work toward meeting our shared outcomes.**

Our organization is:

Unique – United Way is the only local organization that a person can donate to and simultaneously support 13 in-house initiatives and 23 local non-profits – all with one gift!

Powerful – Contributions to United Way are leveraged with other resources to create lasting changes that one organization could not achieve by itself.

Effective – We are not a hand-out but a hand-up – we want to ensure that EVERYONE in our community has the best quality of life possible.

Local – All money raised locally, stays local and we are governed by a local Board. In the last year, we helped 102,259 local people in our communities.

**Serving the communities of
Bristol, Burlington, Plainville, Plymouth & Terryville**

We are making a difference in Education



Helping children and youth achieve their potential

ISSUE:

Children are not prepared for success in kindergarten.

UNITED WAY SOLUTION:

Created and implemented an Early Childhood Blueprint, which works to ensure that children have a good start to be successful in kindergarten and throughout their early years.

ISSUE:

Parents and caregivers do not realize that a child's learning starts from the moment they are born.

UNITED WAY SOLUTION:

Ensure that every parent who has a baby born at Bristol Hospital receives Born Learning materials, which provides ideas to turn everyday moments into fun learning opportunities.

ISSUE:

Middle school students are falling through the cracks.

UNITED WAY SOLUTION:

Developed the Kids in the Middle (KIM) Program, which connects middle school students to the community and caring adults.

ISSUE:

Our six area high schools view each other as rivals and have few opportunities to work together.

UNITED WAY SOLUTION:

Developed the United Way Youth Board where students work collaboratively on projects that impact their peers and the community.

Nicholas' Story

Nicholas, a middle school student in Bristol, was forced to change schools this year when the school he was previously attending closed.

Nicholas' mom said that he was "angry, upset and miserable at his new school"... until he found the KIM Program.

Kids in the Middle (KIM) offers middle school students the chance to connect to caring adults and complete service projects in their community.

Now, Nicholas is doing better and he's happier at his new school. "The KIM Program rescued my child by helping him find a purpose and feel better about himself"

We are making a difference in Income



Helping individuals and families become financially stable & independent

ISSUE:

Adults don't have the life skills necessary for self-sufficiency.

UNITED WAY SOLUTION:

Partner with the CT Money School to offer free financial education classes on topics such as budgeting, credit, debt management, and creating wealth.

ISSUE:

Families are struggling to make ends meet and live within their means.

UNITED WAY SOLUTION:

Created a Financial Coaching Program, which matches clients with a trained coach who will meet with them one-on-one to develop a spending plan with the goal to increase savings and decrease debt.

ISSUE:

Individuals and families are paying too much to have their taxes done and often don't get all of the tax benefits owed to them.

UNITED WAY SOLUTION:

Implemented the VITA Program (Volunteer Income Tax Assistance), where households that earn less than \$50,000 can have their taxes done for free and ensure that they are receiving the largest refund possible.

ISSUE:

Students are going back to school without the proper supplies needed.

UNITED WAY SOLUTION:

Created the Adopt-A-Child Back to School Program, which provides local children with a backpack, school supplies and first day of school outfit.

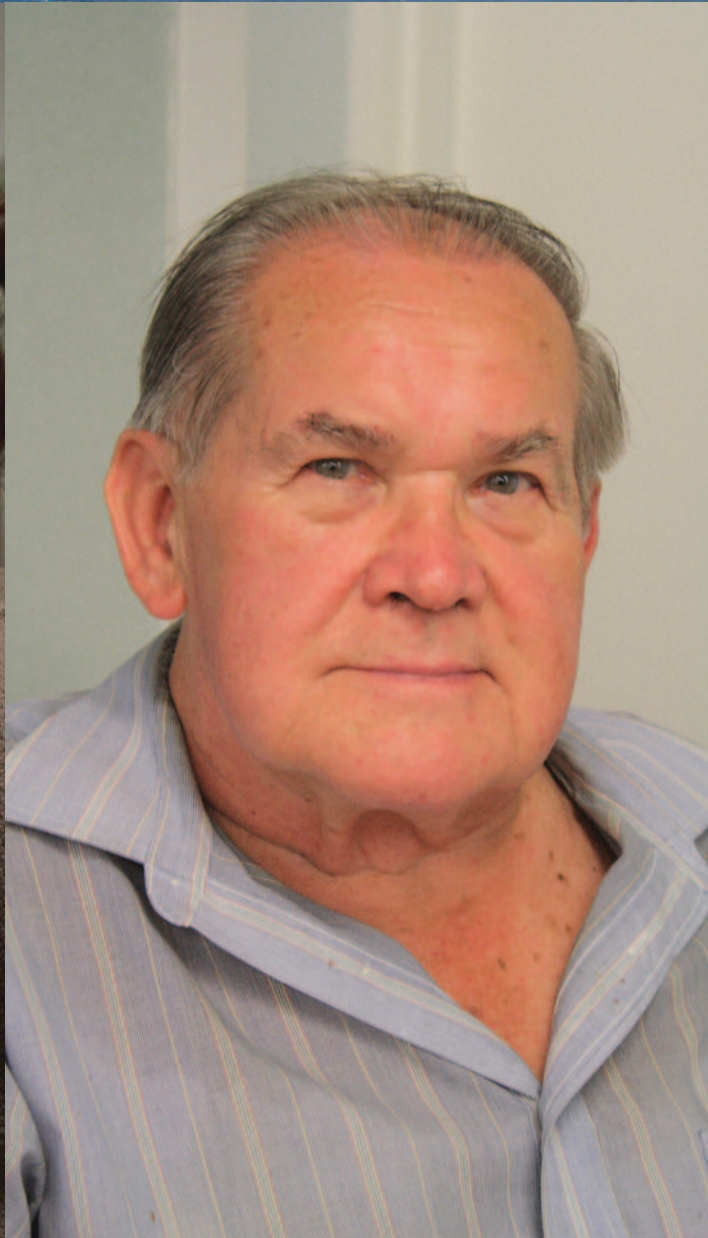
Carolyn's Story

A Plainville woman, who is a divorced mother with two young children and has Multiple Sclerosis (MS), heard about our Financial Coaching Program and decided to give it a try. She was motivated to help herself and looking to build her savings in case her MS flared up again and she couldn't work.

After three months of meeting with her Financial Coach, she said, "This program changed my life. It was the most eye-opening, emotional thing I've ever done in my life."

After seeing where she was spending her money, she stopped smoking, drinking and playing the lotto. "I'm in the best place I've been in the last 10 years!"

We are making a difference in Health



Improving people's health and wellness

ISSUE:

People don't know where to turn for help when they have health and human service issues.

UNITED WAY SOLUTION:

Support 2-1-1, Connecticut's free information and referral service. By calling this toll-free number, callers reach knowledgeable, multilingual staff and get information, referrals or seek help in a crisis, 24 hours a day, 365 days a year.

ISSUE:

Older adults have safety needs and concerns, while also feeling isolated from the community.

UNITED WAY SOLUTION:

Created the West Central Connecticut TRIAD, which is a partnership between law enforcement, older adults and social, business and community organizations. TRIAD strives to strengthen community partnerships that help to improve the quality of life, provide access to social service programs, reduce crime and diminish the fear of crime among older residents.

ISSUE:

Individuals, families and seniors are paying too much for their prescription medications.

UNITED WAY SOLUTION:

Implemented the FamilyWise Prescription Discount Program, which helps lower the cost of prescriptions up to 75%. Lowering the cost of medication enables more people to get the medicine they need. Taking medication as prescribed reduces illness, complications, disease progression, and related healthcare costs.

Joan's Story

An older Bristol woman recently received a phone call at home telling her she had won a significant amount of money. However, in order to receive her prize, she needed to go to the nearest Wal-Mart and wire transfer \$5,000 to the company. They had assured her that once they had received her money, they would send the prize directly to her.

This kind of scam happens all the time to our local seniors. Luckily, Joan knew about this scam because she is part of our TRIAD program, which helps to reduce crimes against older adults. Because of her knowledge of scams, Joan knew to say "no" to this caller.

"Thank heavens for TRIAD! I am \$5,000 richer thanks to this program!"

Dear Friends,

We are so grateful for your support. We would never be able to do the work that we do without the support of people like you and other generous individuals and organizations in our communities.

The testimonials on the earlier pages of this report, along with our solutions to issues in our community, hopefully paint a clear picture of what we do. We are here to ensure that long-lasting changes are made based on the needs of the people in Bristol, Burlington, Plainville, Plymouth and Terryville. We focus our work around the building blocks that everyone needs for a good life – Education, Income and Health.

On the following pages, you can get an idea of how we are accountable with your donations. Our local Board of Directors governs our organization and ensures that we use our resources in the most efficient and cost-effective ways possible. For a more comprehensive look at our finances, you can log onto our website to view our most recent 990 form.

We could not do our work without hundreds of volunteers, far too many to list on these pages. However, it's important for us to honor and thank our biggest advocates – our Board of Directors, who are listed here to the right.

Again, we appreciate your support of our United Way and hope that you will continue to support us in the future. We can also speak on behalf of the 102,259 local people your donation helped this year by saying "Thank You!"

Sincerely,



Donna Osuch
President & CPO



Nancy O'Donnell
Board Chair

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Lesley Blade
Associated Spring HQ

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Triad Healthcare

Eleanor Parente
Town of Burlington

Mark Ziogas, Past Chair
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Ziogas

Gene Prentiss, Asst. Treasurer
Gene F. Prentiss & Co.

Statement of Financial Position

	2012		2011	
	Operations	Building	Total	Total
ASSETS				
<i>Current Assets:</i>				
Cash and cash equivalents	\$ 395,941.00	\$ 10,053.00	\$ 405,994.00	\$ 463,814.00
Cash - Invested	\$ 148,888.00	\$ 0.00	\$ 148,888.00	\$ 148,273.00
Investments, at market values	\$ 797,976.00	\$ 0.00	\$ 797,976.00	\$ 788,031.00
Pledge receivable	\$ 804,516.00	\$ 16,000.00	\$ 820,516.00	\$ 700,774.00
Other receivable	\$ 56,000.00	\$ (56,000.00)	\$ 0.00	\$ 0.00
Other current assets	\$ 2,830.00	\$ 1,811.00	\$ 4,641.00	\$ 4,758.00
Total current assets	\$ 2,206,151.00	\$ (28,136.00)	\$ 2,178,015.00	\$ 2,105,650.00
<i>Plant & Equipment:</i>				
Plant & equipment	\$ 63,726.00	\$ 478,392.00	\$ 542,118.00	\$ 513,016.00
Less - Accumulated depreciation	\$ 55,612.00	\$ 103,563.00	\$ 159,175.00	\$ 142,498.00
Net plant & equipment	\$ 8,114.00	\$ 374,829.00	\$ 382,943.00	\$ 370,518.00
Total assets	\$ 2,214,265.00	\$ 346,693.00	\$ 2,560,958.00	\$ 2,476,168.00
LIABILITIES				
<i>Current Liabilities:</i>				
Allocations payable to designated agencies	\$ 885,129.00	\$ 0.00	\$ 885,129.00	\$ 832,276.00
Mortgage payable-due within one year	\$ 0.00	\$ 7,212.00	\$ 7,212.00	\$ 6,813.00
Notes payable	\$ 0.00	\$ 3,049.00	\$ 3,049.00	\$ 3,049.00
Accounts payable	\$ 16,088.00	\$ 2,162.00	\$ 18,250.00	\$ 26,070.00
Dues to affiliates	\$ 9,562.00	\$ 0.00	\$ 9,562.00	\$ 7,853.00
Total current liabilities	\$ 910,779.00	\$ 12,423.00	\$ 923,202.00	\$ 876,061.00
<i>Long Term Liabilities:</i>				
Notes payable	\$ 0.00	\$ 1,271.00	\$ 1,271.00	\$ 4,320.00
Mortgage payable	\$ 0.00	\$ 197,603.00	\$ 197,603.00	\$ 204,815.00
Total Liabilities	\$ 910,779.00	\$ 211,297.00	\$ 1,122,076.00	\$ 1,085,196.00
NET ASSETS				
<i>Unrestricted:</i>				
Unappropriated	\$ 607,764.00	\$ 85,396.00	\$ 693,160.00	\$ 598,363.00
Designated - Investment in plant and equipment	\$ 8,114.00	\$ 0.00	\$ 8,114.00	\$ 10,414.00
Designated - Board community initiatives	\$ 191,652.00	\$ 0.00	\$ 191,652.00	\$ 228,673.00
Total unrestricted net assets	\$ 807,530.00	\$ 85,396.00	\$ 892,926.00	\$ 837,450.00
<i>Temporarily restricted:</i>	\$ 155,169.00	\$ 50,000.00	\$ 205,169.00	\$ 212,735.00
<i>Permanently restricted:</i>	\$ 340,787.00	\$ 0.00	\$ 340,787.00	\$ 340,787.00
Total net assets	\$ 1,303,486.00	\$ 135,396.00	\$ 1,438,882.00	\$ 1,390,972.00
Total liabilities and net assets	\$ 2,214,265.00	\$ 346,693.00	\$ 2,560,958.00	\$ 2,476,168.00

2012 Fund Distribution

Community Initiative Leveraged Funds	\$90,287.34	Camperships	\$1,240.00
Education		Donor Choice Allocations	\$79,768.77
Income			
Health			

Boys & Girls Club and Family Center of Bristol	\$67,400	CT Community Care <i>Partnership to help older, isolated adults access services (SEHOP)</i>	\$22,345	Plymouth Community Food Pantry <i>Home Delivery Program</i>	\$1,809
<i>Imagine Nation Museum - Early Learning Programs</i>					
<i>Family Center - Challenger/Respite Programs</i>					
<i>Bristol Boys & Girls Club - Power Hour</i>					
<i>Bristol Boys & Girls Club - Outreach Services</i>					
Boys & Girls Club and Family Center of Bristol and the Family Resource Centers at O'Connell, Greene-Hills and South Side Schools	\$16,285	Connecticut Legal Services <i>Legal Aid - Civil</i>	\$4,524	Plymouth Family Resource Center <i>Parent Educator</i> <i>Early Childhood Education</i>	\$10,856
<i>Ages & Stages Questionnaire Screening</i>					
Bristol Adult Resource Center	\$25,332	Literacy Volunteers of Central CT <i>Bristol Literacy Program</i>	\$4,524	Prudence Crandall Center <i>Bristol Outreach Program</i>	\$12,666
<i>Citizen Advocacy Respite/Recreation Volunteer Program</i>					
Bristol Community Organization	\$4,524	Living in Safe Alternatives (LISA) <i>Supervised Apartments & Independent Living (SAIL)</i> <i>Plainville Group Home</i>	\$15,380	Salvation Army <i>Soup Kitchen Program</i> <i>Social Services Program</i>	\$9,047
<i>Retired & Senior Volunteer Program (RSVP)</i>					
Bristol Preschool Child Care Center	\$13,571	Nutmeg Big Brothers Big Sisters <i>Community Based Program</i>	\$4,071	St. Vincent DePaul Mission of Bristol, Inc. <i>Bristol Homeless Shelter</i>	\$18,094
<i>Infant-Toddler & Preschool Care</i>					
Community Mental Health Affiliates (CMHA)	\$22,618	PARC Inc. Plainville <i>Supportive Employment Program</i>	\$9,771	United Way of Connecticut <i>2-1-1 Infoline</i>	\$10,797
<i>Bristol Adult Outpatient</i>					
<i>Terryville Family Services</i>					
		Plainville Community Food Pantry <i>Bread Program</i>	\$5,428	Wheeler Clinic <i>Children's Trauma Care Initiative</i> <i>Early Childhood Support Initiative</i>	\$32,569
		Plainville Day Care Center <i>Preschool, Nursery School and School-age Programs</i>	\$8,142	YWCA of New Britain <i>Sexual Assault Crisis Service</i>	\$8,142

Total Allocations: \$499,191.11

**GIVE. ADVOCATE. VOLUNTEER.
LIVE UNITED.**



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