



Union County United Way 2009 Annual Report

Give. Advocate. Volunteer.

LIVE UNITED



Dear United Way Colleagues, Volunteers and Friends,

We are pleased to share with you this annual report that provides an overview of the accomplishments of the Union County United Way in 2009. This snapshot makes evident how we are working to advance the common good in Union County and surrounding areas by uniting resources to help not only those in need now, but to put systems in place that will benefit our local community reaching far into the future.

Thanks to the help of nearly 200 volunteers, who provided a total of over 1,500 hours of service in 2009, YOUR local United Way had a very successful year in meeting the needs of our Union County neighbors. This year's highlights include:

- Union County United Way invested over \$200,000 into 31 programs that provide essential services to Union County residents.
- In excess of 24,000 lives were touched by United Way programming in Union County in 2009.
- Over 140 Union County individuals and businesses became United Way donors for the first time in 2009. These donors have pledged over \$ 30,000 in new money to support vital community programs.
- The Target Corporation partnered with Union County United Way to invest \$10,000 in our local community by helping individuals enrolled in educational programs attain their goals. With this assistance many individuals have been provided assistance with educational and basic human needs. This program supports individuals in completing programs and earning degrees that will strengthen their efforts in making a better life for themselves and their families.
- For the first time, Union County United Way and all of our 21 Partner Agencies joined forces with the Lewisburg Police Department and many other community service providers to raise awareness of our organization and all of our funded programs at Lewisburg's highly attended National Night Out.
- Union County United Way played a key role in convening Partner Agencies and local non-partner service organizations in forming a community volunteer resource organization called V.O.I.C.E.; Volunteer Opportunities In Community Endeavors. This organization provides networking, training and development for local volunteer managers as well as a coordinated effort to place volunteers of all ages in positions of service throughout Union County.

These accomplishments and more were possible thanks to YOU – United Way donors and friends who have supported us in advancing the common good in Union County. Thank you!

Sincerely,

Leslie P. Temple
Board President

Tina Sigler McDowell
Executive Director



ADVANCING THE COMMON GOOD...



Through Mission:

- Mission Statement

To improve lives of Union County residents by mobilizing and strengthening the caring power of communities.

- Vision Statement

The Union County United Way strives to be a catalyst and partner in mobilizing our community as it engages members and organizations to address the priority human needs of Union County, making it a better place to live.



Through Community Investment:

The Union County United Way supports programs that focus on the following areas of concern in our community -

- *Nurturing Children and Developing Youth*
- *Promoting Life-long Learning and Literacy*
- *Raising Awareness of Affordable Housing and Hunger issues*
- *Increasing Self-Sufficiency*
- *Improving Health and Wellness*
- *Strengthening Families*
- *Crisis Intervention*



United Way Partner Agencies

UCUW Partner Agencies are held to the highest standards of accountability and transparency to ensure that donor dollars are put to the best use in our community.

2009 Partners include:

- Big Brothers/Big Sisters*
- Central Susquehanna Sight Services*
- Donald Heiter Community Center*
- Eastern Union Co. Supplemental Food Program*
- Evangelical Home Health & Hospice*
- Family Life Services*
- Girl Scouts in the Heart of PA*
- Greater Susquehanna Valley YMCA*
- Herr Memorial Library*
- Lewisburg Listening Post*
- Lewisburg/Milton Meals on Wheels*
- Mifflinburg Area Food Bank*
- Public Library of Union County*
- SUM Child Development*
- SUNCOM Industries*
- Susquehanna Council, Boy Scouts of America*
- Susquehanna Valley Women in Transition*
- UC Chapter American Red Cross*
- Union-Snyder Habitat for Humanity*
- West End Library*
- Western Union County Youth Center*

UCUW Annual Meeting Agenda

Feb 22, 2010



Welcome

Invocation
Judy Muchler

Breakfast - 25 min

2008 Campaign Reflection / Donor Recognition
Leslie Temple

Partner Agency Reflection
Tina McDowell
Sandy Hopkins – Habitat for Humanity
Larry Snook – Susquehanna Council of Boys Scouts
Diane Baxley - SVWIT

The Florence Pyle Dedicated Service Award
Presented by: Leslie Temple

The Pat Toole Leadership Award
Presented by: Megan Dugan

Campaign Steering Committee Award
Dedicated Service Award
Presented by: Tina McDowell / Lisa Hoover

Recognition of Retiring Board Members
Leslie Temple

Installation of Officers & New Board Members

Closing Remarks
Leslie Temple



Union County United Way Board of Directors:

Leslie Temple—President
Megan Dugan—Vice President
Tim Kelleher—Treasurer
Sue Greene—Secretary
Rich Barlett
Kathy Bohinski
Karen Bolus
Dr. Mark DiRocco
Tom Evelyn
Josh Grill
Bob Kallin
Dan Lohr
Judy Muchler
Karen Nicholson

Michael Redding
Jim Sanders
Paul Tarves
Susan Telmanik-Schwartz
Linda Treese
Brian Wiktor

Union County United Way Staff:
Tina Sigler McDowell—Executive Director
Leslie Yocum—Fiscal Assistant

Additional Thanks to the following Businesses for in-kind gifts during 2009—Baylor-Hamm Corporation, Bucknell University, Geise & Associates, Summit Design Studio, Williams & Williams Jewelers

Advancing the Common Good... Through Giving:

de Tocqueville Donors \$10,000 and above

Target Corporation Degenstein Foundation

Platinum \$5,000—\$7,499

Playworld Systems

Gold \$2,500—\$4,999

Sara Lee / Butter Crust Baking Co.

Silver \$1,500—\$2,499

Citezen's Electric Co.

Dr & Mrs Mark DiRocco

Robert W. Donehower

Mary Forzani & David Felicio

Mr & Mrs Brooks Gronlund

Lynn M. Hoffman

Mr & Mrs Robert J. Kallin

Mr & Mrs Tim Kelleher

Mr & Mrs Michael O'Keefe

Swineford Bank

Mr & Mrs Paul Tarves

Bronze \$1,000—\$1,499

Mr & Mrs Tim Apple

James Baish

Alan & Martha Barrick

Robert Black

Comfort Inn—New Columbia

Samual Craig

Violet Gallagher

Mr & Mrs Josh Grill

Bruce Harmony

Dr & Mrs Dean Harter

Marcia K. Hoffman

Dr. Kathleen Horne

Kathryn Jenny

Albert Lagerman, Jr.

Dan Lohr

Steven J. Malriat

Ruth McCord

Dr. Shawn McLaughlin

Richard E. Merkle

Mr & Mrs Glenn Miller

Stacy Richards

Mr & Mrs Charles Root

Dr & Mrs Donald Stechschulte

Charles V. Stoops

Mr & Mrs Randle Storm

Mr & Mrs Mike Toole

Linda Treese

Weis Markets Corporation

Leadership \$500—\$ 999

Deborah A. Abowitz

Arthur L. and Jane Amacher

DiAnn Baxley

William Becker

Lori Bennett

Frances and Ronald Blatchley

Jerome and Kathy Bohinski

Brian and Karen Bolus

Albert Bothe

Paul W. Brann, Esq.

Wayne and Kathy Bromfield

Christopher and Kimberly Brown

Douglas and Mary Candland

David M. & Sue Ellen Castellan MD

Daniel J. Clement, Esq.

Rod Companion

Vivian Confer

Kathleen Conley

Candace Cook

Chris Darrup

Thomas Dominick

Evan Hospital—Employee Fund

Thomas E. Evelyn

Maria Fasano Bhangdia

Chris Fellin

Michael A. Foltzer

Mr & Mrs Dean Girton

Mr & Mrs Robert Gronlund

Gary Haggard

Andrea Halpern

David E. Heberlig

Martha S. Holland

Elaine R. Hopkins

Milton and Ruth House

Marion Lois Huffines

John Hunter

Richard and Marian Jarrett

Scott Kerstetter

Tim Kishbaugh

Mark Krammes

Mary Mastascusa

Meixell-Diehl Insurance

Mifflinburg Bank & Trust

Mr & Mrs Dale Miller

Judy Muchler

Sandra Nelson

Jane G. Norton

Dr. Christopher D. Olson

Orchard Pump & Supply Co., Inc.

Mr & Mrs Michael J. Patterson

John and Judy Peeler

Denise B. Prince

Charles W. Purcel

Roberta L. Ravert

Don & Mary Ritzenthaler

Eugene and Joanne Semanchick

Shipton, Inc., C.A.

Dick and Cindy Skelton

William O. Smith

Gary and Sandy Sojka

Pamela J. Souders

Dr. & Mrs. Douglas A. Spotts

Dr. Michael Starr

State Farm Companies Foundation

Megan Dugan State Farm Insurance

David and Susan Sugala

Lynn Michelle Swank

Dr & Mrs Fred Teichman

Susan Telmanik-Schwartz

Kurt and Laura Theide

Dennis & Mary Kay Torretti

Gregory S. Valentine, Sr.

Wal Mart Employee Fund

Chris Weber

Patricia Wenner

Financial Statement



Balance Sheet 12.31.2008

ASSETS		
Current Assets		
	Checking/Savings	
	Cash-Checking-WMSB	86,820.18
	CD-M&T-6 mo, 03/13/10, .75%	16,450.82
	CD-Swineford-15 mo.,	
	9/10,2.00%	21,273.33
	CD-Swineford-15mo, 9/10,	
	2.00%	10,375.48
	MM -M&T- 1.1%	10,377.41
	Petty Cash	100.00
	Total Checking/Savings	<u>145,397.22</u>
	Other Current Assets	
	Pledges Receivable Allowance	-11,993.31
	Pledges Receivable, 2007 Camp	19,926.90
	Pledges Receivable, 2008 Camp	164,164.98
	Total Other Current Assets	<u>172,098.57</u>
	Total Current Assets	317,495.79
	Fixed Assets	
	Accumulated Depreciation	-6,078.00
	Furniture & Equipment	7,566.00
	Total Fixed Assets	<u>1,488.00</u>
	Other Assets	
	Campbell-Arnold Endowment M&T	73,772.92
	Campbell-Arnold Endowment MB&T	347,025.47
	Harris Endowment-1st Nation.Tr	620,597.00
	Total Other Assets	<u>1,041,395.39</u>
	TOTAL ASSETS	<u>1,360,379.18</u>
LIABILITIES & EQUITY		
Liabilities		
	Current Liabilities	
	Other Current Liabilities	
	2009 Alloca-	
	tions	
	Owed,2008	
	Camp	82,713.11
	Total Other Current Liabilities	<u>82,713.11</u>
	Total Current Liabilities	<u>82,713.11</u>
	Total Liabilities	82,713.11
	Equity	
	Net Assets-Unrestricted	575,604.18
	Retained Surplus	-94,404.28
	Temp restricted net assets	957,874.00
	Net Income	-161,407.83
	Total Equity	<u>1,277,666.07</u>
	TOTAL LIABILITIES & EQUITY	<u>1,360,379.18</u>

Financial: Profit & Loss



Profit & Loss 1.1.08 - 12.31.08

Ordinary Income/Expense

Income

Advance-Day of Action Contributions Income 650.00

Current Year Campaign TR-2007 0.00

Current Year Campaign TR-2008 181,130.15

Prior Year Campaign Unres 20,859.80

Total Contributions Income 201,989.95

In-Kind Contribution 72.00

Interest 1,202.00

Interest Income-M & T Bank 539.65

Interest Income-Swineford Bank 515.89

Interest Income - WMSB 574.17

Reimbursed Expenses 60.00

Total Income 205,603.66

Expense

Agency Allocation 142,363.59

Agency Allocation-Harris 22,256.00

Annual Retreat 379.00

Campaign Supplies 7,054.55

Depreciation Expense 855.00

Dues and Subscriptions 4,733.88

Insurance

Disability Insurance 340.00

Liability Insurance 1,546.00

Total Insurance 1,886.00

IRA-Employer 408.45

Janitorial Services 530.14

Licenses and Permits 250.00

Office Equipment 547.00

Office Supplies 6,657.69

Payroll taxes 3,215.03

Postage and Delivery 2,379.29

Printing and Reproduction 70.80

Professional Fees

Accounting 2,750.00

Total Professional Fees 2,750.00

Program Expense

Annual Agency Meeting 503.36

Day of Action 769.33

Total Program Expense 1,272.69

Rent 4,200.00

Secretarial 36,140.51

Staff Development 275.00

Supplies

Office 41.14

Total Supplies 41.14

Telephone 1,080.95

Travel & Ent

Meals 336.79

Travel 1,891.19

Total Travel & Ent 2,227.98

Total Expense 241,574.69

Financial: Profit & Loss - Cont.



Net Ordinary Income	-35,971.03
Other Income/Expense	
Other Income	
Investment Dividend	26,168.53
Investment Interest	16,523.76
Investment Stock Sale Cap Gain	-3,970.87
Unrealized Gains (Losses)	<u>-236,916.91</u>
Total Other Income	-198,195.49
Other Expense	
Change in Temp Restricted NA	
Harris Endow Un-realized G/(L)	0.00
Harris Realized Gain/Loss	<u>0.00</u>
Total Change in Temp Restricted NA	0.00
Management Fees	11,474.48
Write off Uncollected Pledges	<u>10,171.11</u>
Total Other Expense	<u>21,645.59</u>
Net Other Income	<u>-219,841.08</u>
Net Income	<u><u>-255,812.11</u></u>

Union County United Way
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