WHAT THIS PLACE NEEDS... IS YOU

ANNUAL REPORT 2016
Our Vision

To advance the common good by creating lasting changes to improve lives in Bristol, Burlington, Plainville and Plymouth/Terryville.

Our Mission

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

Dear Friends,

Parents struggling to pay for preschool for their 4 year old child in Plainville. A young man trying to find stable housing in Bristol. An older adult worried about falling in Burlington.

Each of these people wants – and deserves – the opportunity to achieve their dreams and support their family. At United Way, nearly 95 years of experience teaches us that community-wide solutions offer the best chance of helping them succeed. That’s why we are fighting harder than ever to build strong communities that allow everyone to attain their goals.

United Way goes beyond single-issue solutions and temporary fixes. Our community impact strategy focuses on ensuring children get a strong start in school, youth connect with their community, and people of all ages have an opportunity to improve their economic status and live a healthy life. By ensuring that everyone has access to these building blocks of a good life, we strengthen all facets of society - empowering individuals and communities through holistic solutions.

We do it by mobilizing the best resources and forging unlikely partnerships. And we don’t rely only on what has worked in the past. We find new solutions tailored to the challenges of our ever-changing world. Our fight is joined by partners from every sector of society. We foster relationships and build trust between local companies, labor organizations, government agencies, educators, non-profit organizations and individuals to bring all voices and stakeholders to the table.

Within this report, you will find examples of our results driven by our impact agenda. Most importantly, you will be reminded that for every program, every initiative and every dollar raised, individual lives have been changed forever. Our society will evolve – and United Way will continue to adapt alongside it – but no matter the time or place, people are being touched because communities are choosing to come together.

That’s the power of community building. That’s what it means to LIVE UNITED. To all our partners, donors and volunteers, thank you for everything you do. We couldn’t do it without you and your dedication to our mission.

What this place needs... is YOU!

Sincerely yours,

Donna Osuch

President and CPO

Jerome Albino, CPA
Pytlak & Albino, LLC, CPA’s

Keith Bernier
Webster Bank

Sue Brault
ConnectCare

Jena Doolittle
Cigna

Donna Gravlin
Barnes Group, Inc.

Patricia Marrin - 1st Vice Chair
First Bristol Federal Credit Union

Tom Mazzarella - Board Chair
Mazzarella Productions

Jim Pelletier
Bristol Police Department

Dave Preleski
Vitrano, Preleski & Wynne

Gregory Provenal
Plymouth Rock Assurance

Dan Reynolds
GE Industrial Solutions

Bryan Ricci, CPA
2nd Vice Chair Ricci & Co.

Trish Tarnilson - Treasurer
Farmington Bank

Byron Treado
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HELPING CHILDREN & YOUTH ACHIEVE THEIR POTENTIAL

Our Community Partners in Education
- BC/BC Bristol Family Resource Center
- Boys & Girls Club of Bristol Family Center
- Bristol Preschool Child Care Center
- CRC/Boy Scouts of America
- Girl Scouts of CT
- Nutmeg Big Brothers Big Sisters
- Plainville Early Learning Center
- Plymouth Family Resource Center
- Project Learn - West Street
- Hartford Subsidy
- Weekend Food Backpack Program
- Participation for Underprivileged Youth
- Summer Campership Program
- Community-Based Mentoring
- Preschool and School-Aged Programs
- Early Childhood Education

United Way Community Impact Work - Education Initiatives
- Born Learning
- Discovery Initiative
- Kids in the Middle (KIM)
- Youth Board

Bristol Early Childhood Alliance’s Maternal Depression Screening Initiative

In 2015, the Bristol Early Childhood Alliance’s Infant and Toddler committee piloted the Maternal Depression Screening Initiative, which in 2015 provided perinatal depression screenings for 446 low-income expectant mothers and mothers of children age 0-1 year who participate in the Bristol Women, Infants and Children (WIC) Program. The primary goal was to identify expectant and new mothers suffering from potential perinatal mood disorders and connect them to resources to address their mental health. WIC staff scored the screens and, if positive, referred the mother to appropriate providers, following up with mothers at subsequent visits to see if referrals were used. Results included:
- 99% of mothers offered a depression screen accepted,
- 82% of mothers offered a depression screen accepted,
- 97% of women screened received an informational pamphlet and 86% of women screening positive accepted a detailed brochure on perinatal depression,
- 100% of women screening positive were offered a mental health referral,
- 65.9% accepted the referral

Appetite for Reading

Formed 8 years ago, Bristol Early Childhood Alliance’s Appetite for Reading program shares the love of reading by getting books into the hands of kids throughout the Bristol area. This effort has grown to include 8 bookshelves at area restaurants, ice cream parlors, pediatrician offices, nonprofits and local businesses. In the past year alone, 4,507 books have flown off the shelves and into the hands of local kids and families.

Kids in the Middle

37 kids from the four school districts participated at 45 organizations and 3,819 hours of community service were completed. Students from Bristol, Burlington, Plainville & Plymouth joined together at Winding Trails (shown above) to learn problem-solving and leadership skills and break down stereotypes. A field day was also held at the Spring at Barnes Nature Center, to celebrate the accomplishments of the year and further strengthen cross-town communication.

Youth Board

30 students from all 6 local high schools met monthly to discuss issues, raise awareness through events such as the United Way Youth Board Forum, and volunteer during local events, such as the Day of Caring and the Children’s Parade.

Learn more about our Kids in the Middle & Youth Board Initiatives here: https://www.youtube.com/watch?v=T35YnX7I5S8
HELPING FAMILIES IMPROVE FINANCIAL STABILITY

Our Community Partners in Income

Bristol Adult Resource Center (BARC)  Respite, Recreation & Volunteerism
Bristol Community Organization (BCO)  Case Worker/Social Services Program
Retired & Senior Volunteer Program (RSVP)
Greater Bristol Literacy Program
Bristol Task Force to End Family Homelessness

United Way Community Impact Work - Income Initiatives

Financial Coaching
Financial Education Classes
Joy of Sharing Holiday Program
Volunteer Income Tax Assistance (VITA)

Bristol Task Force to End Family Homelessness
Over 40 members from 25 partnering organizations worked together to coordinate services and brainstorm short-term and long-term solutions.

Bristol Task Force to End Family Homelessness
During 2015-2016, the Task Force members worked together to:
- Establish a Warming Center for the Homeless
- Secure funding for a Housing Coordinator
- Complete a Point-in-Time Count of the homeless in our community
- Coordinate and strengthen services to homeless individuals
- Set up free appointments for basic hygiene (showers and haircuts)
- Collect and distribute basic needs items (food and hygiene products)
- Transitioned 40 chronically homeless people into permanent supportive housing
- Connect over 150 homeless people with services and support to make their lives more stable

Financial Coaching
15 participants built their family financial stability by participating in one-on-one coaching sessions. All increased their financial knowledge and improved their family’s financial stability, as evidenced by the completion of family budgets, pre- and post-tests and moving forward with their identified financial goals.

Learn more about VITA, our Income initiatives and the volunteers that make it possible here: https://www.youtube.com/watch?v=Xb_BcC6gucE

Income

Volunteer Income Tax Assistance (VITA)
For the 7th year running, free income tax preparation offered twice weekly throughout the tax season.

20 volunteers filed over 505 returns, 43% more than the previous year!

$664,277 was returned to the community through Federal & State refunds last year alone. 93% of clients surveyed reported being “very satisfied with the service they received”.

Financial Education Classes
Classes were offered in partnership with the CT Money School on topics such as credit management, financial recovery, savings and budgeting. 37 individuals were able to grow their knowledge of financial literacy, moving towards improved financial stability for their families. 10 of these attended multiple courses, demonstrating their commitment to strengthening their family’s economic stability and reaching their financial goals.

Financial Coaching
15 participants built their family financial stability by participating in one-on-one coaching sessions. All increased their financial knowledge and improved their family’s financial stability, as evidenced by the completion of family budgets, pre- and post-tests and moving forward with their identified financial goals. 8 new volunteers completed training, which was provided for through funding by the Main Street Community Foundation.

Bristol Task Force to End Family Homelessness
Over 40 members from 25 partnering organizations worked together to coordinate services and brainstorm short-term and long-term solutions.
Health

Improving people’s health & wellness

Our Community Partners in Health

Bristol Hospital Parent & Child Center
Catholic Charities
CNWA
PACS - Plainville
Prudence Crandall Center
Wheelers Clinic

CMHA Behavioral Health Home Initiative
PARC - Plainville Aging with Developmental Disabilities
Prudence Crandall Center Bristol Outreach Program
Wheeler Clinic Bristol Health and Wellness Center

Child and Adolescent Extended Day Treatment

Children’s Trauma Initiative

Early Childhood Development Program

Wheeler Regional YMCA LIVESTRONG at the Y
YWCA of New Britain Sexual Assault Crisis Service

United Way Community Impact Work - Health Initiatives

2-1-1 Infoline Familywise Prescription Discount Program
Stand Strong Live Long Program
West Central Connecticut TRIAD Program

IMPROVING PEOPLE’S HEALTH & WELLNESS

West Central CT TRIAD

The West Central CT TRIAD strives to strengthen community partnerships that help improve the quality of life, health and safety of older residents of Bristol, Burlington, Plainville and Plymouth/Terryville. Over 15 volunteers meet regularly to address Senior Issues through our SALT Council (Seniors And Law Enforcement Together), including members of law enforcement, organizations that serve seniors and older (more experienced!) adult volunteers.

Over 120 seniors came to the Bristol Senior Center for the 4th Annual TRIAD Spring Conference, “Piecing Together Your Overall Health”, to hear Miles Everett of Bristol Hospital (pictured to the right) and Stephanie Shivers of the Alzheimer’s Resource Center. Attendees got to experience Chair Yoga and Stand Strong, Live Long demonstrations, participate in exercises designed to strengthen their cognitive fitness, share a healthy lunch and hear about many resources available in the community.

2-1-1

There were 14,311 total requests for service from our four communities between July 2015 - June 2016.

The top 10 requests for service were:

1) Counseling Settings 6) Utilities
2) Public Assistance Programs 7) Health Supportive Services
3) Mental Health Assessment and Treatment 8) Legal Services
4) Individual and Family Support Services 9) Food
5) Housing / Shelter 10) Substance Abuse Services

FamilyWize Prescription Discount Program

Between July 2015 - June 2016, 2,074 prescriptions were filled using this free discount card in our area, resulting in total savings of $54,781.

Stand Strong, Live Long

The Stand Strong, Live Long program teaches older adults easy exercises and breathing techniques to prevent falls while improving balance and overall health. The class was created through funding from the Older American Act through the North Central Area Agency on Aging, the West Central CT TRIAD and the United Way of West Central CT.

Last year, the multi-week program was brought to Bristol, Burlington, Plainville and Plymouth, reaching 45 seniors. 87% of these surveyed said their balance had improved as a result of class and 71% had signed up for another physical fitness class to keep the benefits of the class going.

United Way Community Impact Work - Health Initiatives

2-1-1 Infoline Familywise Prescription Discount Program
Stand Strong Live Long Program
West Central Connecticut TRIAD Program

1,754 children 4,646 adults 700 seniors were reached with much needed health services from United Way funded programs between 2012-2015.
Over 1,400 United Way volunteers donated over 11,500 hours of service in Bristol, Burlington, Plainville and Plymouth/Terryville, including ...
Volunteerism

Committed to Making a Difference

Volunteers for United Way’s Income-focused work help neighbors build financial stability today and for the future. Programs like the Joy of Sharing Food Drive and Adopt-a-Child Backpack Program meet immediate needs now. Financial Education and Coaching provides families the tools, knowledge and accountability they need to create lasting change in their family’s finances.

Cathy’s Story

Despite working a full-time job, Cathy was having trouble making ends meet. She was matched with Asa Cort, Volunteer Financial Coach. He began working with her, going above and beyond, meeting with her on a regular basis for the next year.

“When Cathy and I met, she was very anxious, concerned and most importantly overwhelmed with her financial situation at the moment. Her biggest concern was to get organized, develop a simple system to track cash flow, and to be less overwhelmed and anxious about finances. Throughout the year of our engagement I can confidently say that Cathy has come a far way both mentally and financially in achieving her goals. Cathy has developed a system for having “less paper” and more a streamlined process for managing her cash flow. Cathy will have tasks to complete as outlined in the coaching sessions, and we have repeated some of those “homework” assignments to ensure continuous improvement. Cathy and I have developed a strong coaching relationship and we continue to ensure that finances are being tracked, being overwhelmed is decreasing and reaching her personal goals are all being accomplished.”

“What did people have to say about our volunteers?

“Smart! So friendly! So wonderful!” “Pleasant environment! It was professionally done.” “Thank you for doing the free tax preparation. The people are very nice and professional!” “Thank you for the service and the people who volunteer!” “This is a very needed and appreciated service. Thank you again!” “Well informed tax preparers.” “Very helpful service, thank you!” “The gentleman doing my taxes was extremely helpful with my situation.” “Keep up the good work. It’s a wonderful service!”

“I would like to thank all the people working in this program and it was a pleasure to meet you.”

WHAT THIS PLACE NEEDS IS... YOU

20 well-trained VITA volunteers
devoted a total of 780 hours of service to help local families in need file tax returns.

This donated time can be valued at more than $21,660!

2016 VITA Team

Volunteerism

“I have learned a LOT... I benefitted immensely from this program and I continue to learn.” – Cathy
WHAT THIS PLACE NEEDS IS... YOU
Your donations to United Way between 2012-2015 made it possible for 21 Community Partners to serve over 31,000 people in the communities of Bristol, Burlington, Plainville and Plymouth/Terryville in 2012-2015

to **GIVE ...**
Reach out to Kim Carmelich, Resource Development Coordinator  kcarmelich@uwwestcentralct.org
or Kimberly Hernandez, Database/Office Manager  khernandez@uwwestcentralct.org

to **ADVOCATE ...**
Reach out to Donna Osuch, President and CPO  dosuch@uwwestcentralct.org

to **VOLUNTEER ...**
Reach out to Elizabeth Hill, Community Impact Coordinator  ehill@uwwestcentralct.org
or Laura Watson, Early Childhood Coordinator  lwatson@uwwestcentralct.org

or visit getconnected.uwwestcentralct.org

Event Highlights 2015-2016

- Youth Board Forum: Don't Be Afraid to Dance with Finance
- Charity Cycling Challenge
- Kids in the Middle Field Day at Barnes Nature Center
- Community Builders Reception
- TRIAD Fall Event: “Don’t Be Scared, Be Prepared”
- Golf Tournament
2015-2016 Fund Distribution

<table>
<thead>
<tr>
<th>Community Initiative Leveraged Funds</th>
<th>$74,853.42</th>
</tr>
</thead>
<tbody>
<tr>
<td>Camperships</td>
<td>$1,240</td>
</tr>
<tr>
<td>Donor Choice Allocations</td>
<td>$54,377.15</td>
</tr>
</tbody>
</table>

**Education**
- BCD/Bristol Family Resource Center: $15,000
- Aged & Stages Screening (SEARCH): $51,850
- Boys & Girls Club of Bristol Family Center: $51,850
- Cambridge Park Outreach Services Project: $12,000
- Project Learn - West Street: $12,000
- Bristol Preschool Child Care Center: $12,000
- Hardship Subsidy Program: $4,000
- Weekend Food Backpack Program: $4,000
- CRIC/Boy Scouts of America: $4,000
- Participation for Underprivileged Youth: $4,000
- Girl Scouts of CT: $4,000
- Summer Campership Program: $4,000
- Nutmeg Big Brothers Big Sisters: $4,000
- Community-Based Mentoring: $4,000
- Plainville Early Learning Center: $7,500
- Preschool and School-Aged Programs: $4,000
- Plymouth Family Resource Center: $4,000
- Early Childhood Education: $4,000

**Income**
- Bristol Adult Resource Center (BARC): $10,000
- Respite, Recreation & Volunteerism: $10,000
- Bristol Community Organization (BCO): $24,000
- Camp Worker/Social Services Program: $8,000
- Retired & Senior Volunteer Program (RSVP): $8,000
- Greater Bristol Literacy Program: $8,000
- Salvation Army: $8,500
- Comprehensive Emergency Assistance Program: $8,000
- St. Vincent De Paul Mission of Bristol: $8,000
- Bristol Homelessness Shelter: $8,000

**Health**
- Bristol Hospital Parent & Child Center: $8,000
- Family Wellness Program: $8,000
- Catholic Charities: $8,000
- Elderly Outreach Counseling Program: $15,000
- CWIA: $15,000
- Behavioral Health Home Initiative: $15,000
- PWAC: $15,000
- Aging with Developmental Disabilities: $15,000
- Prudence Crandall Center: $15,000
- Bristol Outreach Program: $15,000
- Wheeler Clinic: $15,000
- Bristol Health and Wellness Center: $15,000
- Child and Adolescent Extended Day Treatment: $15,000
- Children’s Trauma Initiative: $15,000
- Early Childhood Development Program: $15,000
- Wheeler Regional YMCA: $15,000
- LIVESTRONG at the Y: $15,000
- YMCA of New Britain: $15,000

Statement of Financial Position

<table>
<thead>
<tr>
<th>ASSETS</th>
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<tbody>
<tr>
<td>Current assets:</td>
</tr>
<tr>
<td>Cash and cash equivalents</td>
</tr>
<tr>
<td>Cash-invested</td>
</tr>
<tr>
<td>Investments, at market values</td>
</tr>
<tr>
<td>Pledges receivable</td>
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<tr>
<td>Total current assets</td>
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<td>Net total assets</td>
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<td>Total liabilities</td>
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<td>NET ASSETS</td>
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<td>Restricted:</td>
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<tr>
<td>Unrestricted</td>
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<tr>
<td>Total restricted net assets</td>
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**2016**
- Cash and cash equivalents: $238,908
- Cash-invested: $474,004
- Investments, at market values: $983,178
- Pledges receivable: $109,049
- Total current assets: $1,853,271
- Total net assets: $1,857,687

**2015**
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**LIABILITIES**
- Current liabilities: $726,499
- Accrued liabilities: $1,240
- Due to affiliates: $14,816
- Total current liabilities: $746,114
- Total liabilities: $746,114
- Total net assets: $1,111,573
- Total liabilities and net assets: $1,857,687

**Executive Summary**

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**Community Initiative Leveraged Funds**

- **Bristol Community Organization (BCO)**: $24,000
- **Bristol Hospital Parent & Child Center**: $10,000
- **Family Wellness Program**: $8,000
- **Catholic Charities**: $8,000
- **Elderly Outreach Counseling Program**: $15,000
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- **Child and Adolescent Extended Day Treatment**: $15,000
- **Children’s Trauma Initiative**: $15,000
- **Early Childhood Development Program**: $15,000
- **Wheeler Regional YMCA**: $15,000
- **LIVESTRONG at the Y**: $15,000
- **YMCA of New Britain**: $15,000

**Program Funding**

- **Community Initiative Leveraged Funds**: $74,853.42
- **Camperships**: $1,240
- **Donor Choice Allocations**: $54,377.15

**Net Assets**

- **Unrestricted**: $649,572
- **Appropriated - Investment in Plant and Equipment**: $3,101
- **Appropriated - Board Community Initiatives**: $87,192
- **Total unrestricted net assets**: $652,764
- **Temporarily restricted**: $111,973
- **Permanently restricted**: $340,787
- **Total net assets**: $1,111,573

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