



United Way
Oxford

ANNUAL REPORT

2017/18



MESSAGE FROM SHAUNA & KELLY -

Board President & Executive Director

A COMMUNITY IS A GROUP OF PEOPLE WHO AGREE TO GROW TOGETHER.” - Simon Sinek



Shauna Pow



Kelly Gilson

Each and every day we are inspired by the people of Oxford County and remain committed to doing our absolute best to help improve conditions, provide necessary supports, and to create opportunities for a brighter future.

We are intentional when we ask people ‘what matters’ most to them and ‘what their hopes and dreams’ are for themselves, their family and their community. Our work is grounded in that authentic voice of our community and it is the foundation for our funding investments. Our commitment is to carry-on that work – to continue to engage, connect and listen to all residents of Oxford County.

This past year, our Board of Directors focused on developing a new strategic plan with directions that are designed to support our mission of improving lives and building community by engaging individuals and mobilizing collective action. Our efforts are targeted to ensure that we:

- Achieve measureable impact by improving community conditions.
- Inspire the community to work together to solve social issues.
- Grow revenue to improve lives and build community.
- Enrich organizational excellence through continuous improvement.

Our Youth Places & Spaces report was released this year. This report captured the opinions and perspectives of youth in the City of Woodstock. Their words were powerful and insightful. We were pleased to be able to share their voice to help other community leaders plan forward.

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MESSAGE FROM SHAUNA & KELLY

In 2017/18, we were able to leverage support, investments, connections and efforts. There are many examples but we would like to take this opportunity to highlight two.

In September of 2017, The Vollmershausen Leadership Challenge Grant was announced. Generously funded by Joan and Dennis Vollmershausen along with Liz and John Lessif and others who chose to remain anonymous, the Leadership Challenge Grant matched all new leadership gifts of \$1,200 or more. In addition, for those already contributing \$1,200 or more, the Vollmershausen Leadership Challenge Grant matched all increases over 10%. This unparalleled generosity had tremendous impact on our community, as it inspired donors to give.

Additionally, we experienced the true benefit of collaborative work. Funded partners who were receiving United Way pilot funding leveraged that funding to grow other grants and supports to benefit our community. In addition to being a funder, we were able to lend support, connections and resources to help ensure the stable, long-term funding required to address important community needs.

Our Board and staff are grateful for the support of our community. We are deeply committed to working with integrity, honesty, accountability, and transparency. We take this responsibility to heart and we are here to serve.

THANK YOU! TOGETHER, WE CAN BUILD A HEALTHIER COMMUNITY FOR ALL!

SHAUNA POW
Board President
United Way Oxford

KELLY GILSON
Executive Director
United Way Oxford

MESSAGE FROM CHERYL -

COMMUNITY IMPACT COMMITTEE



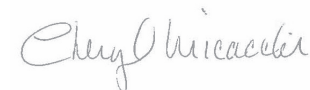
Investing in change, investing for impact. This is what United Way Oxford is all about. By continually deepening our knowledge of our community's needs, we can better understand what matters, where the gaps are, and where there is a readiness and opportunity for change. The Public Knowledge gathered from local citizens is the foundation for our investments – both human and financial resources.

We are fortunate to have 25 local volunteers committed to supporting our impact work, making strategic investment decisions and monitoring those investments. They dedicate countless hours to ensure that we are making the best decisions possible. With an open-funding policy, United Way is now able to continually adjust investments to meet emerging and changing community needs. We are committed to flexibility, in order to meet the needs and capacities of different agencies.

Sometimes our role is to provide base funding to agencies to ensure that they operate and focus on their key programs; other times, we offer seed funding to allow a collaborative group to begin tackling a pressing issue. By providing up to three years of secure and stable funding, agencies are able to focus on their work, which allows them to plan for the long term.

In addition to our financial investments, we are able to bring funded partners together to learn, share and grow. By strengthening those connections, wonderful new opportunities emerge. United Way Oxford is also committed to working with other partners to create and support opportunities to build a stronger Oxford. Whether that is providing administrative support, sharing our research, helping to mobilize action, or providing capacity building opportunities, our staff and volunteers are there to make a positive difference in our community.

As Chair of the Community Impact Committee, I see first-hand how we, along with our agency partners, are continually growing, learning and improving so that we can continue to meet the needs of our community. It has been my pleasure to be a part of this work.



CHERYL MICACCHI
Chair, Community Impact Committee
Board Member

MESSAGE FROM LESLIE -

CAMPAIGN CHAIR



Giving back to my community has always been a priority both personally and professionally. When I was approached to become a leadership volunteer with United Way, I was nervous. I have to admit, I didn't know a lot about the organization but I was eager and willing to learn; to learn how my passion and enthusiasm could be put to work. It didn't take long for me to become inspired. Being part of the Community Impact Council, the volunteer group responsible for reviewing funding applications and making recommendations to the Board of Directors, was my a-ha moment. It provided me with a deeper understanding of the value United Way brings to our community, something I knew others needed to learn about. It positioned me to embrace my role as a Board Member, and to use that platform to bring much needed conversation and awareness to local issues. The conversations were not always easy but they were always worth it.

As Campaign Chair, I had the pleasure of meeting many extraordinary people, doing as I'm told, 'ordinary' things. I was consistently inspired by their generosity and got emotional on many occasions as I thanked them for trusting United Way to invest their gift where it was needed most. It was only with the generosity of thousands of donors that we announced an achievement of \$1.2M, the highest in United Way Oxford's history. Whether you contributed at work, participated in an event or volunteered, I wanted to take this opportunity to say THANK YOU.

I look forward to returning as Campaign Chair in 2018 and encourage you to get involved. Together, we can ensure that valuable programs and services are available now and in the future for anyone and everyone



LESLIE FARRELL

Owner/Operator
Tim Hortons - Norwich Ave.
Campaign Chair, Board Member

MESSAGE FROM LINDA-

LABOUR PARTNERSHIP



The labour movement and United Way share a common vision of making our community a better place to live, work and raise a family.

Our partnership in Oxford County extends back to the 1960's when community advocates recognized the need to come together to support our community's most vulnerable people.

As Chair of United Way Oxford's Labour Committee and as a Board Member, I extend my sincere thanks to union members and all workers from across Oxford County for continuing to generously support the work of United Way. Your leadership and commitment within the workplace continues to improve lives every day. Together, we are tackling important issues such as poverty, mental health and supporting our youth.

I would also like to take this opportunity to recognize the work of the brothers and sisters on the Labour Committee. We continue to focus our efforts on building solidarity and engaging union members about ways to get involved. We recognize and celebrate the success of our partnerships and look forward to a prosperous future.

In Solidarity,



LINDA LEYTEN

President, Oxford Regional Labour Council
Financial Secretary, Unifor Local 88
United Way Oxford Board Member & Labour Liaison

MESSAGE FROM DAVE -

TREASURER'S REPORT



It has been my pleasure to be the Treasurer for 2017/18. As a relatively new Board Member, who has been a long-time supporter, it has been rewarding to learn about how efficient our Board and staff are and how committed they are to controlling costs and spending wisely to ensure that our real work of investing for positive change in our community is our priority.

With my business background, I know how important it is to always keep a close eye on the bottom line; I also know that it is equally as important to measure what matters. Understanding impact, and the return on our community investments, is complicated and complex, yet that is as important as the financial statements; together they tell the full story of success!

I would like to thank the members of the Finance Committee, the Board of Directors and the staff for their guidance and support this past year.

A handwritten signature in blue ink, appearing to read 'DH', with a horizontal line extending to the right.

DAVE HEWITT

Treasurer,
United Way Oxford Board of Directors

YOUTH UNITED -

COMMUNITY BUILDERS



Youth United is a council of 10 young leaders committed to creating positive change in our community. We inspire and mobilize our peers across Oxford County to identify a need, create a plan for change and measure the impact. In 2017/18, we were able to provide small grants and support to the following projects.

Promoting Arts with Kids - Jacob Wiley, Woodstock Collegiate Institute & Central Public School
Wellness Wednesday - Jenny Lamb, Woodstock Collegiate Institute & Oxford County Board of Health

Winter Warmth & Care - Megan Stevenson & Sydney Force, College Avenue Secondary School
Tomorrow's Chefs - Jessica Leduc, Oxford County Community Health Centre

As Youth United leaders, we're learning more and more about the needs in our community. As a result of this deeper understanding, our peers applying for grants learn more, too. When an applicant is successful in receiving a grant, they learn how to meet the need more specifically and understand the importance of our community working together. I am proud of the work we have accomplished in our second year!

CRYSTAL USHER

Youth United Chair

GenNEXT -

CONNECTING PROFESSIONALS



We are so excited to introduce Oxford County to our GenNEXT Committee! We are a small committee made up of eight young professionals looking to give-back in new and diverse ways. Our goal is to educate people in their 20's and 30's about the issues impacting individuals in our community, while giving them an opportunity to build new professional connections. We are generating awareness and knowledge about poverty, mental health and kids in Oxford County. We achieve this through unique and fun events such as, Pop-up Giving, UDodge dodgeball tournament and Tampon Tuesday.

To learn more about our committee or how you can get involved, email brittany@unitedwayoxford.ca or check out our Facebook Page: United Way Oxford's Gennext.

AMANDA KREIGER & RACHEL ROBINSON GenNEXT Co-Chairs



38TH ANNUAL UNITED WAY OXFORD WES MAGILL AWARD -



Wes Magill's commitment and desire to build a stronger community was foundational in the establishment of United Way Oxford. His passion and influence were instrumental in bringing people together to create positive change. In honour of his legacy, United Way Oxford established the Wes Magill award in 1980 to annually recognize an individual or company that encompasses his spirit and commitment.

In 2017, United Way was proud to recognize the extraordinary commitment of Toyota Motor Manufacturing Canada (TMMC) and their Team Members. Since the opening of the Woodstock plant, TMMC has been a committed partner in helping to make this a community we are all proud to call home.

Their involvement has included generous corporate investments, a robust employee giving campaign, participation in the sponsored employee program, support for employee-driven initiatives that benefit the community, and encouragement for their Team Members to participate in activities such as Day of Caring and Seeing is Believing tours. Collectively, their efforts have impacted many children, youth, individuals and families throughout Oxford County. They have provided opportunities for a brighter future.

Please join the Magill Family and United Way Oxford in congratulating TMMC and thanking them for their tremendous commitment to our community.

PHOTO

Frank Vandrus, John Ficzero, Barbara Graham, Ricardo DeSouza, Kathy Reston



SUMMARY STATEMENT OF OPERATIONS

	2018	2017
REVENUE:		
Campaign Revenue	1,202,547	1,173,718
Designations from other United Ways	55,134	50,125
Pledge Loss	(65,927)	(45,000)
Grants, Sponsorships and Other Income	49,006	79,775
Investments	17,507	40,618
	<u>1,258,267</u>	<u>1,299,236</u>
EXPENSES:		
Fundraising Expense		
Campaign Costs	183,043	193,849
Allocation of Management & Administrative Costs	48,610	43,743
	<u>231,653</u>	<u>237,592</u>
Distribution and Community Programs and Services Expenses		
Allocations to Agencies	522,700	610,560
Allocation to Community Initiative Fund/Community Services	79,413	82,919
Donor Directed Designations	96,739	120,984
Other Program Costs	274,072	220,413
Allocation of Management & Administrative Costs	52,661	47,388
	<u>1,025,585</u>	<u>1,082,264</u>
EXCESS (DEFICIENCY) REVENUE OVER EXPENSES	1,029	(20,620)

The above information is a summary of the details in the March 31, 2017 Financial Statements audited by Micacchi, Warnick & Company. Copies of United Way Oxford's audited financial statements, in alignment with Canadian accounting standards for not-for-profit organizations and United Way Canada – Centraide Canada's Transparency and Accountability Financial Standards, are available at www.unitedwayoxford.ca. For a printed copy, please call (519) 539-3851.



ACCOUNTABILITY

COMMITMENT TO OUR COMMUNITY

United Way Oxford's Board of Directors and staff take accountability to our community very seriously. We are grateful for the trust we receive from stakeholders including individuals, corporations and labour groups. This support is critical to our work of improving lives here at home.

ACCURATE AND EFFICIENT

To ensure transparency, we have a volunteer Finance Committee, chaired by our Board Treasurer, who works with our Board of Directors to regularly monitor the financial undertakings of United Way Oxford. Together, we strive to be effective, efficient, responsible and accountable. We fully comply with United Way Canada's Transparency, Accountability and Financial Reporting standards and meet all accepted non-profit accounting standards. The Board reviews financial statements and investments on a monthly basis; sets and approves the annual budget as well as all compensation levels that reflect the skill and experience required to properly manage a non-profit agency.

EFFECTIVE AND ACCOUNTABLE

The money that is raised here in Oxford County is invested in Oxford County. United Way Oxford works to ensure that as much as possible of every dollar goes directly back to our community. We are able to do this thanks to our many volunteers and workplace champions who work on our behalf as well as by actively soliciting sponsorships and in-kind donations. We are proud to say that our fundraising and administration costs are almost ½ of what the Canadian Revenue Agency (CRA) accepts. We encourage all donors to be informed and educated about their investments and recommend that they visit the CRA website under Charities Listings as well as our own www.unitedwayoxford.ca for accurate, legal information.



BOARD OF DIRECTORS

EXECUTIVE

Shauna Pow, Pow Engineering - President • Giselle Lutfallah, Oxford Children's Aid Society - 1st Vice President • Frank Vandrus, Toyota Motor Manufacturing Canada - 2nd Vice President • Dave Hewitt, Retired - Treasurer • Marilyn Price, Lyndon Fish Hatcheries Inc. - Secretary

DIRECTORS

Cheryl Micacchi, Retired - Member • David Calder, Town of Tillsonburg - Member • Elizabeth Schell, Farm Credit Canada - Member • Katie Higginbottom, Woodstock Collegiate Institute - Member • Laura Glenney, OECYC - Member • Leslie Farrell, Tim Hortons - Member • Linda Leyten, Oxford Regional Labour Council - Member • Rod Potgieter, Retired - Member • Soraya Abud-Benevides, Public

COMMUNITY IMPACT COUNCIL

Cheryl Micacchi, Chair
Kelly Gilson, Executive Director
Beth Taylor
Deb Almost
Jill Demers
Katie Higginbottom
Lisa Munro
Megan Porter
Shauna Pow
Tracey Thompson
Devon Tamasi
Dona Acre
Kristi Cross
Lisa McReynolds
Lynda Bartlett
Soraya Abud Benevides
Giselle Lutfallah
Jenilee Cook
Lisa Wells
Michelle Murphy
Rebecca Wallace
Rod Potgieter
Sue Reid

FINANCE COMMITTEE

Dave Hewitt – Treasurer
David Calder
Laura Glenney
Linda Leyten
Monte Shillington
Shauna Pow

CAMPAIGN CABINET

Leslie Farrell, Tim Hortons - Campaign Chair
Amanda Kreiger
Beth Taylor
Dan Borthwick
Jason Stanko

LABOUR COMMITTEE

Linda Leyten, Chair
ORLC & Unifor Local 88
Dan Borthwick, Unifor Local 88
Melissa Holden, Unifor Local 636
Paul Dunn, Unifor Local 636

COMMUNICATIONS COMMITTEE

Genna Conte
Justine Eggink
Sorya Abud Benevides

GENNEXT

Amanda Kreiger, Co-chair
Rachel Robinson, Co-chair
Jake Donnelly
Jason Stanko
Justin O'Dea
Lindsay Wells
Phillip Bryson
Sarah Thibodeau

YOUTH UNITED

Crystal Usher, Chair
Hailey Plant
Sarah Karelsen
Emily Slosser
Tiffany Goor
Riley Hamilton
Jennifer Lam
Abbey Davis
Meghan Bloomfield
Teighan Morris

STAFF

Kelly Gilson, Executive Director
Anne Wismer, Operations Manager
Shelley Lachapelle, Resource Development & Communications Manager
Jennifer Belleth, Resource Development Coordinator
Rachel Robinson, Resource Development Coordinator
*Resigned in February, 2018
Brittany Taylor, Resource Development & Data Coordinator



TOGETHER, WE ARE POSSIBILITY



United Way
Oxford





United Way
Oxford
100% LOCAL

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Dominion Securities

Charitable Registration#: BN 11930 3642 RR 0001