

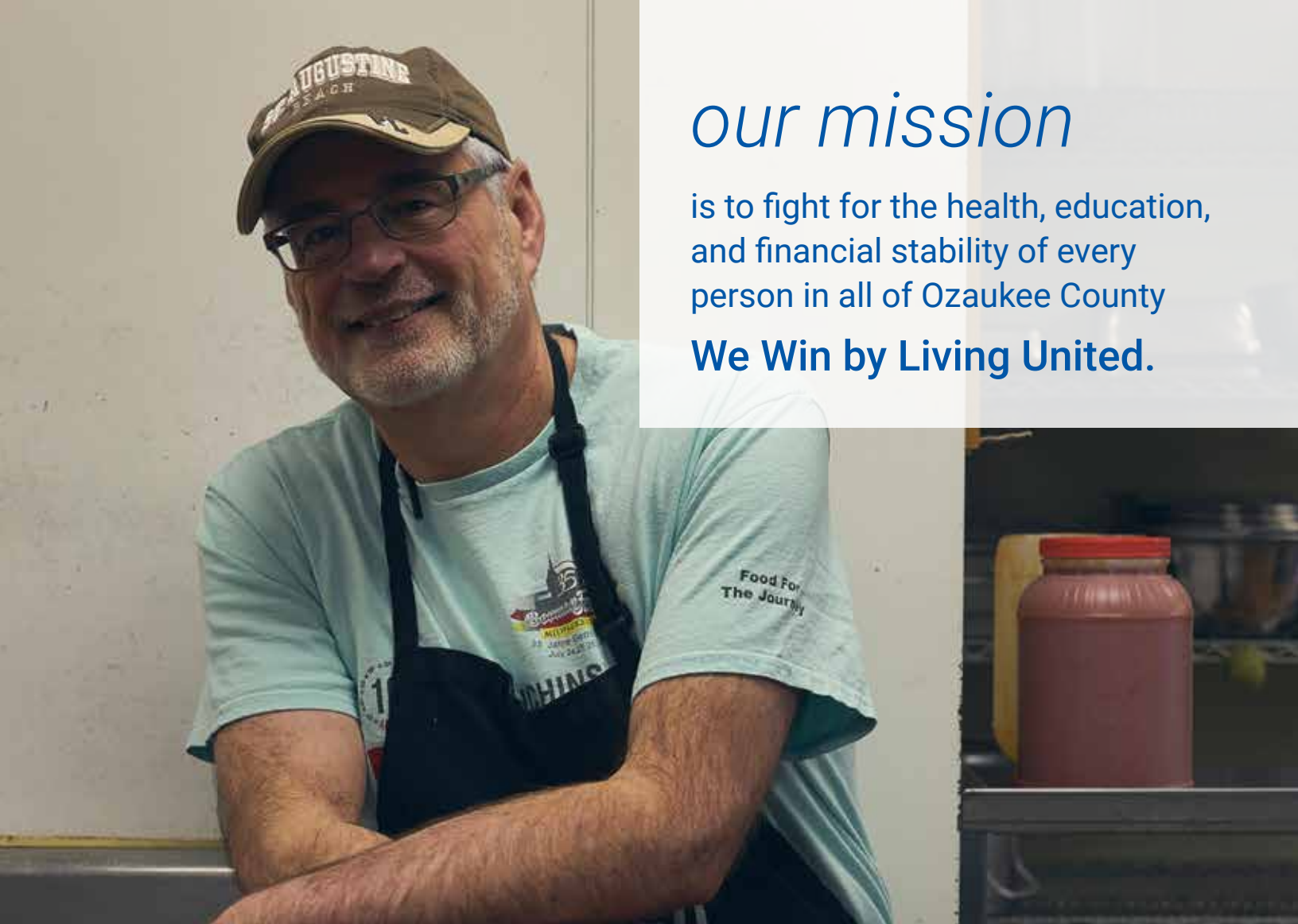


# UNITED WAY OF NORTHERN OZAUKEE

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# ANNUAL REPORT **2017-2018**





## *our mission*

is to fight for the health, education,  
and financial stability of every  
person in all of Ozaukee County

**We Win by Living United.**

## a very special thank you to our dedicated board and volunteers

### **Board of Directors - Executive Board**

**Cindy Nierode** *Board President*  
Port Washington State Bank

**Gerry Antoine** *Governance*  
Antoine Hoeft & Eberhardt S.C.

**Don Bystricky** *Member at Large*  
Community Member

**Robert Haupt** *Allocation*  
Community Member

**Emily Kapszukiewicz** *Marketing*  
Sargento

**Chris King** *Treasurer*  
Port Washington State Bank

**Craig Modahl** *Community Impact*  
Next Breath, LLC

**Annie Stadler** *Vice President of Campaign*  
Port Washington State Bank

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**Rick Bate**  
Rick Bate Photography

**Tom Carson**  
City of Port Washington

**Wilma Bonaparte**  
MATC

**Tony Matera**  
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**Jonathan Neulreich**  
Johnson Financial Group

**SRI Vasudevan**  
Community Member

**Ron Voigt**  
Ozaukee County

**Dr. Michael Weber**  
Port Washington School District

**Karen Weber**  
Community Member

### **Campaign Cabinet**

**Deb Fedel**  
Seek Careers Staffing

**Joe Graf**  
Community Volunteer

**Jim Lysaught**  
Community Volunteer

### **Key Volunteer Leaders**

**Jill Grimm** *Accounting*  
Port Washington State Bank

**Dana Carter** *Marketing*  
ManpowerGroup

**Scott Gutelius** *Website Developer*  
Scott Gutelius Website Development

# A MESSAGE FROM THE BOARD PRESIDENT AND EXECUTIVE DIRECTOR

LIVE UNITED



Cindy Nierode  
Board President



Barbara Bates-Nelson  
Executive Director

United Way of Northern Ozaukee is grateful for all of the support they received from the community this year to help us and our partner agencies help people live their best lives possible.

Dream big was slogan for the 2017-18 campaign. We set an optimistic goal of \$400,000. We worked hard to do our part to offset the increase in demand for client services, and increase our fund raising capacity to minimize the effects of funding cuts at the national, state and philanthropic arena. Although we did not achieve our fundraising goal we are committed to fight for our neighbors in need while building and strengthening our organizational capacity to tackle the growing challenges.

Many people in our community are experiencing problems they do not know how to address alone.

You will hear Tammy's story of determination to make a better life and how she is harnessing the power of education to make her life brighter. Jean tells her story about how she was able to stay connected to the outside world with Interfaith's vital support services. Or let Michael share how he received training and mentoring so he could get a livable wage job and be part of a larger community.

They all needed the help of their community to overcome the obstacles and challenges that stood in the way of their dreams. That's exactly how many of the people in our community feel ...hopeless and helpless. . But with the help of our caring community, United Way and our partner agencies are there to give them the tools, skills and support to live the best lives possible.

That is why the United Way of Northern Ozaukee is so important to this community, to bring us together, focus our time and resources on addressing critical and complex community issues, and make measurable and long-lasting change. Here is a small snapshot of the issues we are working on alongside our partner agencies:

- Working with key stakeholders to improve access to treatment and services for those dealing with mental health or substance abuse issues
- Confronting literacy and providing early learning opportunities and mentorship program
- Championing homeless prevention assistance in order to eliminate homelessness
- Advocating and supporting those abused or in domestic violence situations
- and empowering seniors and people with disabilities.

Thank you to the many hand raisers and game changers in our community. We are grateful for you: our community is a better place because of you.

Thank you,

Cindy Nierode and  
Barbara Bates-Nelson

"SO MANY OF OUR  
DREAMS AT FIRST  
SEEM IMPOSSIBLE,  
THEN THEY SEEM  
IMPROBABLE,  
AND THEN, WHEN  
WE SUMMON  
THE WILL, THEY  
SOON BECOME  
INEVITABLE."

- Christopher Reeve  
actor who played Superman  
and advocate for individuals  
living with paralysis





# MEET ALICE

ALICE is  
Asset Limited  
Income Constrained  
Employed

Currently, many of our hardworking neighbors simply don't earn enough to make ends meet. In fact, in Ozaukee County 5% of households are living below the poverty line and an additional 26% of the population live below the ALICE threshold.

Nearly **one third** of households in Ozaukee County are **one emergency away from financial disaster**.

These hard facts lead to even harder choices: Repair the car or buy your prescription medicine? Take a sick child to the emergency clinic or buy food for the family? One unexpected expense can lead to life-changing consequences, such as losing a job or losing a home.

We believe that no one should have to make the choice between healthcare and food; no one should have to live on the edge of financial disaster. That's why we are working to bring our working families to a safer, more sustainable place.

Visit [www.unitedwayno.org](http://www.unitedwayno.org) for more information on our work to help ALICE.



## IMPACT AND INVESTMENTS

# financial stability



United Way is a leader and advocate for financial stability for all residents, a necessary foundation for families and individuals to thrive. **In the past two years, United Way has reinvested \$171,750 in programs and resources that enable individuals to achieve stable employment and financial literacy.**

Michael, a high school student, began attending **Portal's "Transition and Community Skills" program**, which empowers people with disabilities by removing barriers, changing perceptions and gaining independence through meaningful employment. His school was not able to provide the same depth of community-based transition services. Michael is learning soft skills needed to interact with supervisors, co-workers and customers at work, has exposure to businesses and industries, receives hands-on experience through volunteering, interviews and job shadowing, and is increasing his self-advocacy. As a direct result of the program, Michael is actively searching for employment to continue after high school, presented at a self-advocacy conference, and obtained his State of Wisconsin ID card which allowed him to vote for the first time!

### UNITED WAY PARTNER AGENCIES

- Adult Literacy
- Advocates
- Family Sharing of Ozaukee
- Portal
- Salvation Army

### UNITED WAY FUNDED PROGRAMS

- Adult Literacy
- Homeless Prevention
- Food Distribution
- Employment Opportunity Services
- for individuals with disabilities
- Emergency Vouchers



**233  
individuals**

were able to remain in their homes after receiving rent assistance under United Ways Housing Prevention Fund.

**8,493 individuals**

were helped with safety net services to support crisis and intervention services as a means of creating stability in their lives.

**66,061 lbs of food**

were distributed to families in need through Family Sharing of Ozaukee.

**117 young adults  
with disabilities**

engaged in supportive services that expanded their skills for employment and social success through Portal's Transition to Employment Program.

**200+ quarts of soup**

were distributed between Advocates, Saukville Food Pantry, and Family Sharing of Ozaukee from our Stone Soup Event.

**75% of families** who received rent assistance will maintain stable housing for at least 6 months.





## IMPACT AND INVESTMENTS



### 726 families/ caregivers

participated in parent education and support programs through Ozaukee Family Services to help parents be the best parents they can be and to build a strong foundation for children.

### 152 youth

participated in community based out of school programs and/or received Individualized support from Big Brothers Big Sisters.

### 65% of the youths in mentoring programs

showed positive improvement in their math skills.

In 2017,

### 14 incarcerated adults

graduated and earned either their GED or HSED which will give them the necessary skills they need to find successful employment as they transition back into society.

### 100% of the

**parents** increased their knowledge of appropriate parenting skills and reduced parenting stress.

## education

United Way fights for the education of every person in every community. In the last two years, United Way has invested \$181,300 in programs and non-profit partners that connect people with the tools, knowledge, and networks they need to thrive both in life and in the job market.



The **Ozaukee County Jail Literacy Program** helps incarcerated adults reintegrate into society with the necessary skills to find employment and lead healthier, more productive lives. Tammy is one of the individuals who completed the program. She set out to get her GED certificate (or High School Equivalency Diploma). She worked hard and passed every competency test in math, science, social studies, and language arts. Not only did she receive the credentials for a GED/HSED, she also set a new goal of continuing her education to become an accountant.

### UNITED WAY PARTNER AGENCIES

- Big Brothers/Big Sisters
- Boy Scouts/Girl Scouts
- Ozaukee Family Services
- Ozaukee Jail Literacy
- NAMI
- Threshold

### UNITED WAY FUNDED PROGRAMS

- Mentoring
- Youth Development
- Parents As Teachers (PATs)
- Education for families dealing with mental illness
- Early childhood and family mental health support
- Continuing Education for Incarcerated Individuals



## IMPACT AND INVESTMENTS

### 1,136 Ozaukee County residents

received emotional support and crisis intervention through the COPE Hotline.

### 334 teens and young adults

received substance abuse literacy training so they have the knowledge and skills for making smart decisions about substance use.

### 233 children and young adults

affected by domestic violence were provided with recovery support and comprehensive resources through Advocates' Children's Program.

**120 Volunteers** provided critical transportation to seniors and adults with disabilities, resulting in

**over 8,000 rides.**

## health



United Way is committed to mobilizing resources and creating partnerships to expand access to healthy foods, opportunities for physical activities, quality healthcare, and promote a greater quality of life. **In the last 2 years, UWNO allocated \$252,000 to programs and non-profit agencies in Ozaukee County dedicated to healthy living.**

Jean recently started using a wheelchair and found herself struggling to find transportation in Port Washington. At 90-years-old, she no longer drives; nor has family members nearby. Jean is not alone in her need for transportation and help with basic chores around the house: 19% of people in Ozaukee County are age 65+ of which 30% are living alone. Jean happily greets Thomas, a volunteer with **Interfaith Caregivers**, when he pulls up to drive her to appointments and help her run basic errands. With the help of United Way of Northern Ozaukee funding, Interfaith has grown their vehicle fleet to include two wheelchair accessible vehicles, with a third one on order.

### UNITED WAY PARTNER AGENCIES

- Advocates
- Balance
- COPE
- Interfaith Caregivers
- Lakeshore Regional Child Advocacy Center
- Starting Point

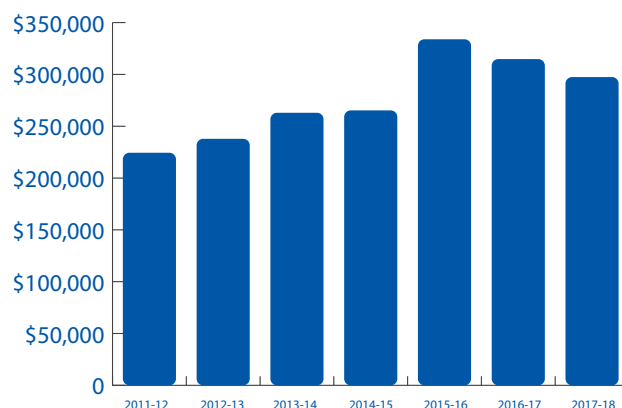
### UNITED WAY FUNDED PROGRAMS

- Child Advocacy & Support
- Aging in Place for Individuals with Disabilities
- COPE Help Line
- Support Services to Seniors & Adults with Limited Mobility
- Child Advocacy Center
- Anti-Drug/Substance Abuse Support & Prevention

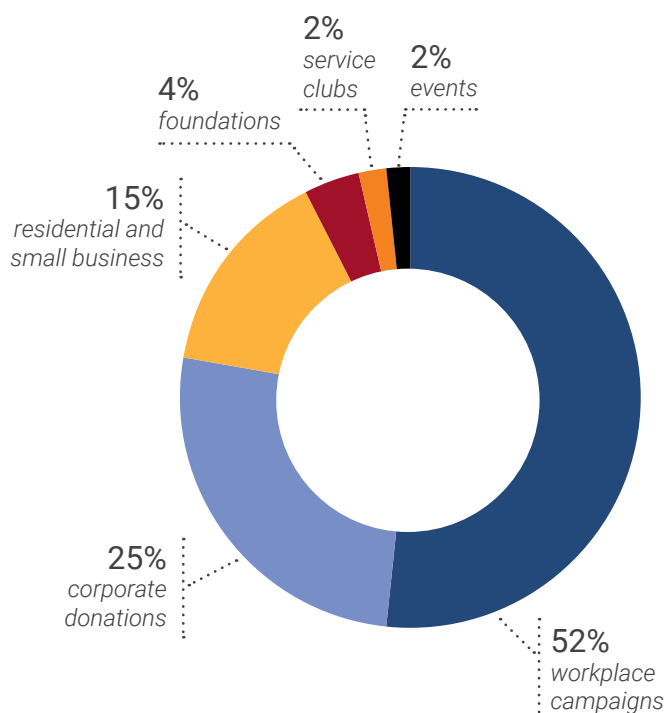
# FINANCIAL PERFORMANCE

## United Way Campaign Trend

Thanks to the generosity of more than 85 local companies and organizations and the nearly 1,000 donors who participated in this year's campaign, we say thanks for stepping up to help. We know that our work isn't done and that we will need to continue to grow our campaign in order to respond to the growing needs for services. **Together, we are united to make a difference in our neighborhoods.**



## Source of Donations



## United Way of Northern Ozaukee, Inc. Statement of Financial Position as of March 31, 2018

### Assets

Cash & Cash Equivalents	\$162,612
Pledge Receivables	\$165,748
Other Assets	-
<b>Total Assets</b>	<b>\$328,360</b>

### Liabilities & Net Assets

Accrued Liabilities	\$2,295
Allocations and Designations Payable	\$212,750
<b>Total Current Liabilities</b>	<b>\$215,045</b>

### Net Assets

Unrestricted Net Assets	\$113,315
<b>Total Net Assets</b>	<b>\$113,315</b>
	\$328,360



# THANK YOU TO OUR GENEROUS 2017-2018 CAMPAIGN KEY CONTRIBUTORS

## TOCQUEVILLE SOCIETY

*Thanks to Charter and Port Washington State Bank and their employees for demonstrating outstanding volunteer service and leading the way through generous leadership giving.*



We extend our deepest gratitude to all of those who stepped up and answered the call to give to our great community this year, improving the quality of life for all.

**THANK YOU.**



## spotlight: greatest growth

**A.N. Ansay & Associates** 140%  
**Ozaukee County** 70%  
**Kohler Company** 67%  
**BMO Harris Bank** 21%  
**WE Energies** 20%



## spotlight: greatest participation

### DDW Recognized for High Employee Participation

DDW Color in Port Washington is proud to support the United Way of Northern Ozaukee. It is one of our key values to "act responsibly and make a positive difference in each community where we live and work". Our 100% match is part of this support. We are pleased with the response that we have received from our associates and with the work that the United Way is doing here!



## OUR FUTURE GOALS FOR INVESTING IN OUR COMMUNITY

LIVE UNITED

As we enter 2018, we believe it is more important than ever to articulate the value of your local United Way and ensure United Way of Northern Ozaukee and its partners remain strong. Our local United Way plays an important role in supporting working families and ensuring every member of their community has the opportunity to reach his or her full potential.

### We are committed to...

- Continuing to be focused on homeless prevention, transportation, child advocacy, and critical life line services while providing leadership on new emerging and complex issues like mental health, and substance abuse.
- Raise our fundraising capacity so that we can respond to the growing needs. United Way is committed to mobilize additional campaign resources to advocate for critical and pressing community needs.
- Leverage strategic partnerships with innovative and diverse problem solving skills to improve IMPACT
- Build a stronger volunteer engagement strategy including skill based volunteerism to increase overall efficiency for all of the non- profit community.

Creating awareness around suburban poverty and changing the dialogue with the reality that members of our community are facing real challenges and they can't go it alone...they need our help. With nearly one third of the households in Ozaukee are in financial peril. One emergency away from a financial crisis. We are working to bring our working families to a safer, more sustainable place.





## GIVE. ADVOCATE. VOLUNTEER.

In 2017, after serving the community for more than 28 years, the standalone Volunteer Center of Ozaukee County officially closed its doors. After many months and community conversations it was determined that the United Way of Northern Ozaukee would continue with the legacy of matching volunteers to opportunities within the community. Volunteerism is a cornerstone strategy in United Way's fight for the health, education and financial stability of every person in every community. Here are a few ways that your talents and skills can be utilized to make a meaningful difference in our community:

**DAY OF SERVICE:** Engage in community building work with a team-building community project. We will connect your team with volunteer opportunities.

**VOLUNTEERS ARE GIVING BACK AT WORK, TOO.** Community impact is also happening during work hours. Volunteering has become an integral part of many companies' social responsibility efforts.

**VOLUNTEERS ARE CONTRIBUTING IN UNIQUE WAYS.** From conducting home renovations to assembling literacy and hygiene kits, and backpacks loaded with school supplies, volunteers are giving back in innovative ways.

### VOLUNTEER AT COMMUNITY EVENTS

**Family Fun Day** at Beer Garden in Port Washington on **Saturday, September 8, 2018**. Help us collect nonperishable food or volunteer at the food or beverage area or in the kids' corner

**Stone Soup Event** Package freshly cooked soup for the Food Pantry and the women's shelter on **Saturday, October 6, 2018**. Volunteers can cut up vegetables and help pack and deliver nonperishable items to the Food Pantry.



### Benefits of Volunteerism

- Build stronger teams
- Boost employee morale and commitment
- Improve employee retention and future recruitment
- Allow individuals to utilize their skills and strengths to help a nonprofits mission work
- Develop future leaders
- Volunteer are agents of change, inspiring others to follow their lead
- Leveraging the expertise of volunteers and their skills maximizes the impact of nonprofits and their mission critical work



Looking to create a positive impact in your own backyard?

Visit [www.volunteerozaukee.com](http://www.volunteerozaukee.com) to explore volunteer opportunities.



Donate to help us strengthen the Ozaukee County community.

To give, please visit [www.unitedwayno.org](http://www.unitedwayno.org)

**WE WIN BY LIVING UNITED**



United Way of Northern Ozaukee

[www.unitedwayno.org](http://www.unitedwayno.org)