

# Annual Report

## 2013-2014



We are pleased to share with you the 2013 Annual Report to the Community for the United Way of Northern Ozaukee.

Our 2013 fundraising goal was \$275,000. Although some of our workplace campaigns saw growth, overall the United Way campaign fell short of its goal. For the fiscal year 2013-2014 (ending March 31, 2014) our campaign raised over \$250,000. The dollars raised remained flat from last year's campaign. We continue to be thankful for your generosity. Our total represents over 825 donors.

Throughout the year, we have seen and heard countless stories of people who have been helped by a United Way program. For instance, a woman talks about how Family Sharing helped her get through a rough period after she lost her job. Family Sharing helped fill the gap with food and basic necessities until she could find another job. After five months, she expressed her appreciation and said that she no longer needed Family Sharing because she had found a job.

From Balance Inc. we learned about how their Supported Living Program helped an individual with developmental disabilities move into his first apartment at 40 years of age. He is learning how to manage his own money, menu planning and preparation and other daily living activities. Thanks to the support from agencies like Balance, Interfaith Caregivers, Ozaukee Circle of Friends, and Portal, individuals with disabilities are leading more inclusive lives where they succeed and thrive. It is these stories that push us to work hard every day to achieve our goals.

As you read through this year's annual report, take a moment to reflect on everything we've done together. Please reach out to me anytime to share your thoughts and opinions by phone at (262) 284-8098 or by email at [uwno@sbcglobal.org](mailto:uwno@sbcglobal.org). Check out our new website at [www.unitedwayno.org](http://www.unitedwayno.org).

I hope this report inspires you to become even more engaged in our work.

**Barbara Bates-Nelson**

Executive Director

## Where Your Donations Came From



## How They Were Invested

| Community Investment in Education   | \$145,100 in Grants |
|---|---------------------|
| Advocates<br>Child Education Programs for Domestic Violence Clients         | \$33,500            |
| Balance Inc.<br>Supported Living Programs                                   | \$22,000            |
| Bay-Lakes Council, Boy Scouts of America<br>Comprehensive Youth Development | \$2,000             |
| Big Brothers Big Sisters<br>Community and School Based Mentoring            | \$10,000            |
| Girl Scouts of Manitou Council<br>Girl Leadership Experience                | \$2,000             |
| Ozaukee County Jail Literacy<br>GED/HSED Testing Program                    | \$6,100             |
| Ozaukee Family Services<br>Parent Education & Support                       | \$30,500            |
| Portal, Inc.<br>Working Towards Employment                                  | \$28,000            |
| Starting Point of Ozaukee<br>Living Everyday Alcohol & Drug Free Lives      | \$11,000            |

| Community Investment in Health                                    | \$36,000 in Grants |
|---|--------------------|
| COPE Services, Inc.<br>COPE Hotline                               | \$7,000            |
| Interfaith Caregivers of Ozaukee County<br>Senior Respite Care    | \$8,000            |
| Ozaukee County Circle of Friends<br>Social & Recreational Program | \$7,000            |
| Volunteer Center of Ozaukee County<br>Volunteerism Program        | \$14,000           |

| Community Investment in Income                               | \$35,500 in Grants |
|--|--------------------|
| American Red Cross<br>Disaster Relief                        | \$3,000            |
| Family Sharing of Ozaukee<br>Food Distribution Program       | \$15,000           |
| The Salvation Army<br>Service Extension Emergency Assistance | \$7,500            |
| Youth & Family Project<br>Homeless prevention                | \$10,000           |

## **TOCQUEVILLE SOCIETY**

**\$10,000 +**

Charter Steel  
Port Washington State Bank

## **LIGHTHOUSE KEEPERS**

**\$1500-\$9,999**

Anonymous  
Anonymous  
Allen Edmonds  
Arno Gunther Trust  
BMO Harris Bank  
Robert & Carrol Haupt  
Ruth Lansing  
John & Polly LeBlanc  
Manitowoc Company  
Schenck S.C.  
Ronald & Elizabeth Schowalter  
Mark & Catherine Schowalter  
Steve & Wendy Schowalter  
WE Energy Foundation

## **FLAG RAISERS**

**\$1000-\$1499**

Anonymous  
Anonymous  
Anonymous  
Anonymous  
Anonymous  
Anonymous  
Craig Beecher Family Charitable  
Trust  
Edward Jones, Jim Asplin Agency  
Caterpillar Foundation  
Hepburn "Bootstrap" Foundation  
Linda Chaloupka  
Central File  
Barb Fischer  
Renee & Josh Johnson  
Peter Kolbach  
Doug & Vicky McManus  
Frank Metz  
Michael Nelson  
Robin & Cindy Nierode  
Charlie & Ann Ross

Sargento Foods Inc.  
Bill & Jean Schanen  
Lenore Sprague  
Stephen Ward  
Michael Wood

## **SETTLERS**

**\$750- \$999**

Anonymous  
Anonymous  
Anonymous  
Anonymous  
Anonymous  
Anonymous  
A.N. Ansay & Associates  
Associated Bank  
Richard & Jill Bunting  
Jim & Middy Froemming  
Mary Karnitz  
Landmark Credit Union  
Nicholas Leifield  
John Long  
Regan Robertson  
Patricia Stockhausen

## **PIONEERS**

**\$500- \$749**

Anonymous  
Anonymous  
Anonymous  
Anonymous  
Ann Augustin  
Thomas Baldwin  
Barbara Bates-Nelson & Rick  
Nelson  
Donna Bennett  
Anthony Bernier  
Deborah Bienlein  
Roberta Campbell  
Paul Carufel  
Michael Eliszewski  
Peter Ensich  
Brandon Hahn  
Mike Harrison  
Al & Judy Krier  
Carla & Michael LaFever  
Timothy Leahy  
Mary Fran Lepeska

Marcos Mejia  
Dwight Miller  
Joseph Miotla  
Modern Equipment  
Daodie Moore  
Ann Noster  
James Pauly  
Robert Platteter  
Donald Sauer  
Port Washington Saukville Rotary  
Fred & Kathie Schaefer  
Matt Schroeder  
Sharbuno Jewelers  
Jon Schlindwein  
Melanie Spencer  
Annie Stadler  
Michael Thelen  
Cathie Tikkanen  
Ronald Voigt  
Natalie Warther  
Charles & Kathy Watry  
Lisa Wilkening  
Jeremiah Wille

## **EXPLORERS**

**\$250-\$499**

Anonymous  
Anonymous  
Anonymous  
Anonymous  
Anonymous  
Anonymous  
Anonymous  
Anonymous  
Anonymous  
Debra Alt  
Mary Albrecht  
Mike Anderson & Heidi Steenberg  
Antoine, Hoeft & Eberhardt S.C.  
Gerald & Anne Antoine  
David Beck  
Kenneth Bell  
Biever Travel  
Doug & Susan Bostwick  
Janet Brady  
Millie & Wil Brazeau  
Gail Bruss  
Peter Carlson  
Daniel Cavanaugh

John & Suanne Cavanaugh  
Michael Cornell  
Mark Cromy  
Wendy DeBlaey  
Rick Deblois  
Thomas Dieringer  
Isabelle Dore  
Chris Drasch  
Jason Dzwinel  
Christopher Dvoran  
Jon Edgren  
Eric Eder  
Cheri Farnsworth  
David Ferraino  
Gordon & Judith Fillar  
Steven Fulton  
Ricky Gaskill  
Paul Grady  
Cindy Glander  
Steve Guthrie  
Shea Halula  
Rachel Halverson  
Janice Heimerl  
Steve Hellman  
Robert & Marjorie Henkle  
Terry Hoffman  
Steven Jagow  
Ken Jonas  
Colleen Kasper  
Randy Kernats  
Jeffery Killey  
Chris King  
Jon Krell  
John & Chris Kunz  
Morris Labelle  
Dawn Lemke  
Fredonia Lions Club  
Port Washington Lions Club  
Ralph Luedtke  
Ryan Lusher  
Heather Mader  
Deborah Manoni  
Ryan McMullen  
Brian Mayer  
Thomas Meaux  
Richard Michel  
Peter Minns



James Minzlaff  
James Moore  
James Myers  
Duane & Karen Nadolski  
Timothy Niemuth  
William Oberkrieser  
Judith & Philip Olson  
Carla Phillips  
Michelle Pike  
Denise Plutowski  
Phoenix Ramirez  
Randall Rausch  
Jack & Dorothy Reindl  
Jeff Richards  
Cynthia Rindfleisch  
Jack & Patti Rooney  
Michael Rose  
Matthew Rowdon  
Dean Sabe  
Michael Sauer  
Ashley Savatski  
James & Jennifer Schowalter  
Alan Schupp  
Ronald Schram  
Christopher Schramm  
Matthew Schuetz  
Angela Sikowski  
Kimberly Simon  
Lloyd Smith  
Jeff Stolper  
Carol Stuebe  
Warren Stumpe  
Mary Survis  
Ronald Theis  
Quest Speciality Chemicals  
Eric Wagner  
Dr. Michael Weber & Karen Weber  
Patricia Weidert  
Brian Wellnitz  
George Welter  
Anthony Wheaton  
Ronald Wilke  
Douglas Winter  
Sally Ziegler  
Timothy Zeien  
John Zippel

### TRAILBLAZERS \$150-\$249

Anonymous  
Anonymous  
Anonymous  
Anonymous  
Sally Anderson  
Jesse Anklam  
Janice Barnard  
Ned Bartelt  
Jeffrey Baumann  
Steven Beason  
Kris & Jill Becker  
Bret Beckman  
Erik Bergan  
James Biley  
Rebecca Bink  
Meghan Bode  
Cheryl Boldt  
John Bonde  
Courtney Borden  
Dan Buehler  
John Bryant  
Julia Bruckner  
Sara Caswell  
Anna Collett  
Isidro Cordova  
Ray & Sharon Crandall  
Vicki Czisny  
Robert Dietz  
Jack Dobson  
Kristine Edwards  
Denise Elbe



Randy Gasser  
Gerald Gierach  
Doug & Janine Graham  
Christine Gregozeski  
Arthur Halbrooks  
Jo Heckenbach  
Scott Hron  
David Hunsicke  
Amanda Lanser  
Peggy Lanser  
Kathy & Jerome LeMahieu  
Ruth Lorge  
John Lynch  
Timothy McClone  
Kathleen & Tom Mlada  
Jesse Morales  
Harry Mueller  
Shawn Mueller  
Sandra Nelson  
Karen Norman  
Dennis Ott

Ozaukee County Homemakers  
Jacqueline Papenfuss  
Alex & Rick Pieper  
Savannah Pierdzioch  
Sandra Rappold  
Luke Rehrauer  
Donald Roeber  
Sally Savatski  
Gregory Schaefer  
John & Kelly Schafer  
Kathleen Schmidt  
Lori Schmidt  
Dennis Schmitz  
Jay Schreurs  
John & Gina Taucher  
Patricia Villeneuve  
Lina Vorpahl  
Jonathan Vrzal  
David & Debra Wickesberg

*Every attempt has been made to ensure accuracy. We apologize for any omissions or inaccuracies.*

### United Way of Northern Ozaukee , Inc. Statement of Financial Position as of March 31, 2014

#### Assets:

|                         |                         |
|-------------------------|-------------------------|
| Cash & Cash Equivalents | \$266,108               |
| Pledge Receivables      | 157,576                 |
| Other Assets            | (213)                   |
| <b>Total Assets</b>     | <b><u>\$383,471</u></b> |

#### Liabilities & Net Assets

|                                      |                  |
|--------------------------------------|------------------|
| Accrued Liabilities                  | \$2,710          |
| Allocations and Designations payable | \$133,875        |
| <b>Total Current Liabilities</b>     | <b>\$136,585</b> |

#### Net Assets

|                         |                         |
|-------------------------|-------------------------|
| Unrestricted Net Assets | \$246,886               |
| <b>Total Net Assets</b> | <b><u>\$246,886</u></b> |

# 2013-2014 Board of Directors

**Board Chairman:** Matt Schroeder (Charter Steel)

**VP of Campaign:** Don Bystricky (Modern Equipment)

**VP Allocation:** Randy Nitsch (Acuity Insurance)

**VP Marketing:** Rick Bate (Rick Bate Photography)

**VP Community Impact:** Dr. Michael Weber (Port Washington Saukville Schools)

**VP Governance:** Gerry Antoine (Antoine, Hoeft, & Eberhardt Law Firm)

**Treasurer:** Cindy Nierode (Port Washington State Bank)

**Strategic Planning:** Mary Kannenberg (Aurora Health Care)

**Executive Director:** Barbara Bates-Nelson (B2N Relationship Marketing)

Ann Augustin (BMO Harris Bank)

Mark Grams (City of Port Washington)

Bennett Jacobson (Symmetry Corporation)

Chris King (Port Washington State Bank)

Nal Kumar (Johnson Control)

Tony Matera (A.N. Ansay & Associates)

John Reichert (Chocolate Chisel)

Lenore Sprague (U.S. Bank)

Annie Stadler (Port Washington State Bank)

Ron Voigt (Ozaukee County)

Karen Weber (Retired)

