

Without you,
there would be
no way.

MISSION

Bringing people and resources together to strengthen our community.

VISION

A healthy, caring and inclusive community.

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One town. One heart. One Way.



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Print Materials Sponsor: **Genworth Financial**



2009 Annual Report



Jill Yousie, Board Chair

At the heart of our community are committed people who care about Oakville's health, welfare and social network. This has never been so clearly demonstrated as in this past year. Despite the economic climate and uncertainty faced by many, the citizens and businesses of this community rallied to help United Way of Oakville exceed its fundraising goal.

Thanks to your generosity and support UWO was able to invest \$2.194 million into sixty critical human and social service programs throughout our community. Among these were four new programs administered by three new agencies.

As Oakville continues to evolve, our Board, staff and volunteers remain committed to ensuring donor dollars are invested wisely and effectively. Together with our funded agencies, community partners and generous donors we can make a very positive difference in the lives of those in need here in Oakville.



Barbara Burton, CEO

United Way of Oakville has had a year filled with new challenges and new successes. As a town of great prosperity and strength, Oakville is a wonderful place to live and work. At the same time, we also have our difficulties. Right now in Oakville, there are families in need of help, there are children who go to bed hungry, there are isolated seniors, and there are individuals living in abusive situations. All of these people need our help.

United Way of Oakville invests donor dollars into our four funding priority areas: strengthening families, supporting independence and well-being in seniors, supporting those in crisis, and promoting self-sufficiency in individuals.

This year the community saw a landscape change with the economic downturn. United Way has provided support for agencies serving individuals in need. Over the next year, we will face even greater challenges as we work to increase our investment in this community. We look forward to your support as we work to help those in the greatest need.



Avis Maher, Chair, Finance and Audit Committee

Despite disappointing results in the financial markets affecting United Way of Oakville's portfolio of investments, the organization has invested more into the community for 2008-2009 than in the previous year, while maintaining general administration expense levels. Some of the notable financial indices this year are as follows:

- Slight increase in total revenue (before investment losses) year over year.
- Ratio of general and administration expenses to distributable revenue remained consistent with previous year.
- Increase in agency allocations and donor choice designations to other charities from 64.4% of distributable revenue in 2007 to 68% in 2008.
- Increase in the total cost of fundraising from 18.5% of distributable revenue in 2007 to 19.2% in 2008.
- Deficiency of revenue over expenditure due to losses sustained on investments and settlement costs incurred.



Investment in our community:

Based on the results of the 2008 – 2009 Campaign, United Way of Oakville will provide funding to the following 31 human and social service agencies:

Agency Name	09/10 Allocation	Agency Name	09/10 Allocation
Acclaim Health	\$143,974	Hope Place Centres	\$105,500
ADAPT	\$66,230	Links2Care	\$6,038
Big Brothers Big Sisters of Halton	\$272,087	Nelson Youth Centres	\$78,400
CNIB	\$34,692	Oakville Distress Centre	\$95,000
Canadian Hearing Society	\$20,957	Oakville Kiwanis Meals on Wheels	\$23,508
Canadian Mental Health Association	\$64,132	Oakville Literacy Council	\$14,369
Canadian Red Cross Society	\$49,501	Oakville Parent-Child Centre	\$56,473
Community Development Halton	\$80,000	ROCK (Reach Out Centre for Kids)	\$123,281
Community Living Oakville	\$28,936	St. John Ambulance, Oakville Branch	\$ 9,747
Community Youth Programs Inc.	\$34,533	SAVIS (Sexual Assault & Violence Intervention Services)	\$ 4,500
FAST (Family Adolescent Straight Talk)	\$33,528	S.E.N.A.C.A. Seniors Day Program	\$63,463
Food For Life Canada	\$75,100	STRIDE	\$30,000
Grace House	\$31,380	Support and Housing-Halton	\$145,083
Halton Family Services	\$343,353	The Women's Centre	\$30,488
Halton Food For Thought	\$18,000	Total Allocation:	\$2,194,851
Halton Multicultural Council	\$41,713		
Halton Trauma Centre	\$70,885		

To learn more about agencies and initiatives funded by United Way of Oakville, please visit www.uwoakville.org.

Funded Agencies

United Way of Oakville provides funding to community agencies that achieve real and measurable results in four priority areas:

- Strengthen families
- Support independence and well-being in seniors
- Support those in crisis
- Promote self-sufficiency in individuals

Here are some of the results:

- Acclaim Health reports that 93 per cent of seniors who had volunteers visit them at their house were able to live more independently within their own home.
- Oakville Distress Centre reports that 83 per cent of callers were less lonely and isolated as a result of the interaction with the distress line.
- Community Youth Programs reports that 100 per cent of youth participating in a residential program had improved grades at the end of the first semester. Educational success is an important predictor of mental and physical health over our lifetime.
- Food for Life reports that 87 per cent of individuals who received food had increased resources available to cover basic living expenses.

STATEMENT OF OPERATIONS FOR THE YEAR ENDED MARCH 31, 2009

	(\$) 2009	(\$) 2008
REVENUE		
Donations	2,300,035	2,384,098
Net transferred from other United Ways	1,057,074	1,020,138
Gross campaign Revenue	3,357,109	3,404,236
Less: Provision for pledge losses	(89,000)	(79,832)
Net campaign revenue	3,268,109	3,324,404
Sponsorships	46,699	18,107
Major gifts	123,118	78,790
Special event revenue	119,775	101,205
Grants	-	12,436
Investment Income	(212,681)	(67,600)
Other income	10,802	6,485
	3,355,822	3,473,827
EXPENDITURES		
Fundraising (schedule 2a)	678,144	656,599
Excess of revenue over expenditures before programs	2,677,678	2,817,228
Programs		
Member agency allocation	2,183,894	2,144,061
Donor choice designations to other charities	98,300	91,834
Internal (schedule 2b)	577,372	609,816
Settlement costs	105,540	-
	2,965,106	2,845,711
Deficiency of revenue over expenditures	(287,428)	(28,483)

BALANCE SHEET AS AT MARCH 31, 2009

	(\$) 2009	(\$) 2008
ASSETS		
Current		
Cash	441,157	464,603
Pledges receivable	1,608,566	1,753,832
Other receivables	10,893	8,477
Prepaid expenses	17,360	19,914
Endowment fund investments	462,331	562,302
Investments in marketable securities	3,573,696	3,472,769
	6,114,003	6,281,897
Capital assets	23,983	32,780
	6,137,986	6,314,677
LIABILITIES		
Current		
Accounts payable	59,448	40,482
Member agency allocations	2,194,851	2,144,061
Donor choice designations	257,776	352,573
Deferred revenue	2,433,521	2,214,305
	4,945,596	4,751,421
NET ASSETS		
Operating fund	730,059	1,000,954
Endowment fund	462,331	562,302
	1,192,390	1,563,256
	6,137,986	6,314,677

United Way of Oakville Expenditures 2008-09

