



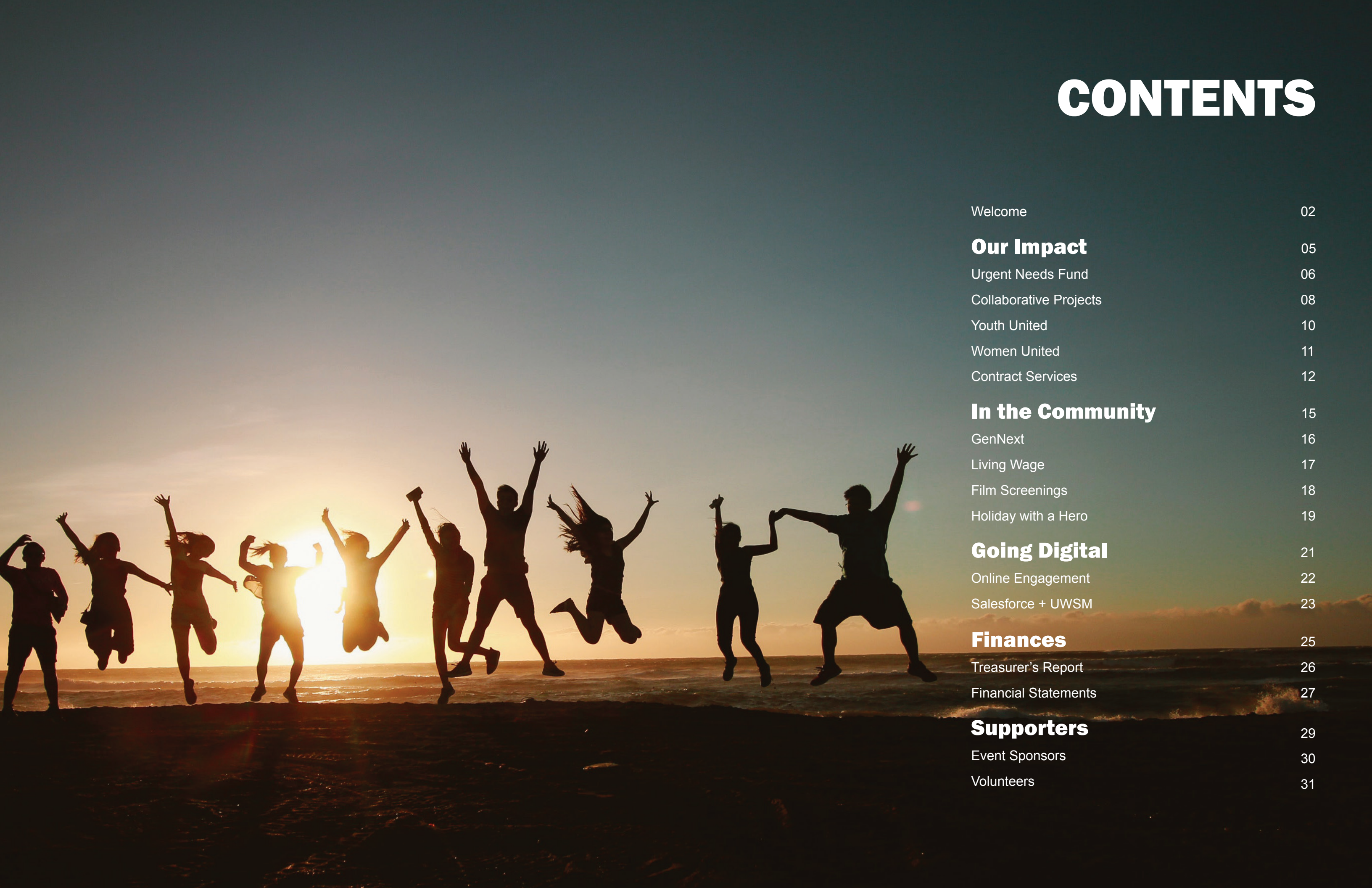
This is  
#LocalLove

2019-2020 Annual Report  
United Way Simcoe Muskoka



United Way  
Centraide  
Simcoe Muskoka





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# FOR OUR COMMUNITIES

The way in which we ended this year was extraordinary by all accounts. We were only beginning to experience the upheaval and uncertainty that will define the year ahead. However, if we use that as a reflection point, looking back over the past year we can see that we were well positioned to cope. Our revenue model has been diversified for many years and we have planned carefully for the launch of a new community investment strategy. And that brings us to what we achieved – the data we have gathered from our work has informed our new strategy as we evolve from supporting organizations individually to investing in community projects built locally around pressing issues.

United Way Simcoe Muskoka (UWSM) has sought to find ways to support our economically diverse region over the past six decades that are familiar to most people – providing funds to local organizations to help them offer community-based programs and services that serve children, families and individuals. As donations declined year over year, it became



apparent that this model required change. We undertook a broad consultation process, gained input from a wide swath of stakeholders and re-envisioned our geography to create six sub-regions where communities were already working together. Encouraging collaboration, we invited organizations to come together to form multi-year projects that would address local needs related to poverty and social inclusion. UWSM provided training and support for organizations to imagine how they could align or combine their efforts to achieve significant results. Six projects were identified and ready for launch until the pandemic required a pause. These projects will start later in 2020.

A pilot project started in the fall of 2019 gave UWSM the opportunity to test a long-held idea - to help people that find themselves in a situation where a small amount of money to address a very urgent need with a modest grant will let them move forward, rather than hold them back and create bigger challenges. Called the Urgent Needs Fund and combining the efforts of 211 and six Regional Agency Leads (RALs), the success

**“The data we have gathered from our work has informed our new strategy as we evolve from supporting organizations individually to investing in community projects built locally around pressing issues.”**



/UWSimcoeMuskoka



@UWSimcoeMuskoka



/UWSimcoeMuskoka

# WE ARE BETTER TOGETHER

of this initiative was almost immediate. Following the pilot, when the pandemic struck, UWSM immediately deployed a COVID-19 Urgent Needs Fund and expanded it to include an Indigenous RAL.

United Way Simcoe Muskoka has continued to use our experience and expertise to deliver programs through contracted services; both as a Community Entity for the federal Reaching Home program for rural and remote communities across Ontario and by managing and administering the Low-Income Energy Assistance Program for six Ontario utilities.

UWSM staff participate and serve on numerous community tables and boards reinforcing the value of collaboration and knowledge sharing that unite us in the common cause of ensuring everyone has an opportunity to thrive.

This year, we strived to do more than ever before. Our desire to inform and educate continued with two documentary film screenings, and our outreach to engage the next generation of United Way leaders was strengthened. We also focused on specific issues impacting girls and women through the philanthropy of women donors as

part of Women United, a United Way global initiative that is improving the lives of women and girls in our local communities.

Together with our Board, we are involved in contributing to discussions and actions that will strengthen the United Way movement across the country. Our Board members and all our volunteers are builders and connectors in our communities and contribute significantly to our stability and performance. We are grateful to them.

And while last—but certainly not least—we save this paragraph to honour our supporters, our donors, our partners, and the many organizations and agencies that contribute to building the kind of communities we all want to live in.

As we learned with the advent of the pandemic, the well-being of our families, friends, neighbours and colleagues is a collective responsibility and we do become better together. The acts of kindness and generosity that have become a daily occurrence fall under the category of what we at United Way Simcoe Muskoka call #LocalLove.



**Dale Biddell**

CEO  
United Way Simcoe Muskoka



**David Mayers**

Board Chair  
United Way Simcoe Muskoka





# **OUR IMPACT**

**Urgent Needs Fund**

**Collaborative Projects**

**Youth United**

**Women United**

**Contract Services**



# URGENT NEEDS FUND

In October 2019, United Way Simcoe Muskoka introduced a brand-new initiative to our communities: the Urgent Needs Fund. This fund came about after a series of community consultations with municipalities, frontline charities and community partners, during which a recurring need surfaced time and time again. That need was for small, timely grants to help in emergency situations. For many Simcoe Muskoka residents, the difference between being trapped in poverty or living a life to their full potential could just be a seemingly small but very significant gesture.

Thus, the Urgent Needs Fund was created and piloted from October 2019 – March 2020. By providing timely, one-time grants to people struggling to make ends meet, United Way Simcoe Muskoka has been able to help close the gap and help our most vulnerable residents.

Following the six-month pilot:



## RECIPIENT TESTIMONIALS

“You have given me the ability to start over, to start fresh. I was able to put some food in my belly - get some sanity needed to keep going. You kick started the process to improve my situation. I also went to court and got my kid back. **Things are so much better now.**”

“The funds kept our hydro on and got me some emergency dental work. **It was a huge help.**”

“I am a widow and I have zero food in the house. My husband was ill and passed away leaving not much money. These funds were given to me in the most gracious manner. **I felt treated like a real person** which was better than receiving the actual funds themselves.”

“**We would not have eaten if we hadn’t received these funds.**”

Simcoe Muskoka is a lot of geography to cover for an organization our size, and we needed a strategy to make a meaningful impact with the donations entrusted to us.

We connected with some great partners in our six sub-regions to not only distribute the funds but to track the local needs and impact of the grants to better understand the face of poverty in our communities.

Community Connections 211 Central East managed the client intake and assessment process; they are a UWSM-funded agency that connects local residents with all available community services.

211 also tracked and recorded all program data. They conducted follow up phone calls with recipients to determine the impact of the grant. This feedback will be invaluable to our ongoing community poverty-reduction work across Simcoe Muskoka.



95%

Of grant recipients felt better prepared to handle their needs or situation

96%

Of grant recipients said the process of receiving support was easy

96%

Of recipients reported having a better understanding of community resources as a result of the Urgent Needs Fund

As a longstanding funder of 211, we knew that their trained Community Navigators would be ideally suited to deliver the Urgent Needs Fund with compassion and care for our local residents.

Once 211 had assessed a client’s needs, we needed to deliver these grants to individuals in a timely way. To facilitate that part of the program, we partnered with six local organizations to act as our Regional Agency Leads. This allowed us to connect with clients in their local community, reducing barriers to access help.

Our Regional Agency Leads quickly went above and beyond delivering the grant to local residents to ensure they had everything they needed. They worked with clients to obtain the items they required and sometimes accompanied them to the grocery store or to buy winter clothing or to pay a bill on their behalf.

To tackle an issue as prevalent as poverty, we know that it takes all of us. By working with our community partners, our Urgent Needs Fund has helped many Simcoe Muskoka residents who are living with poverty every day. It is this cooperative approach that also inspired our new Collaborative Projects coming later this year.



# COLLABORATIVE PROJECTS

While poverty can affect people in similar ways, Simcoe Muskoka is so large and diverse that our communities each experience poverty differently. Our recent work with the Urgent Needs Fund, in addition to our 60 years of community investment and engagement, has reinforced that it requires a community-wide solution to address poverty and create opportunity for all residents in our region.

Because of our deep experience in the community, United Way Simcoe Muskoka decided to shift gears and change our traditional funding model to adapt to the region’s most pressing needs. To this end, we will be launching six new cross-sector, multi-year Collaborative Projects, one in each of our sub-regions. These projects will bring together and leverage the expertise and skills of all partners involved—not just charities, but non-profits, faith organizations, municipalities and private sector businesses—to address an unmet need caused by poverty in each of our sub-regions.

The Collaborative Projects were intended to launch in the spring, but the COVID-19 pandemic forced us to adapt to the new needs of our communities. While we have been there for the individuals and agencies that need us during this crisis by continuing to offer our Urgent Needs Fund and to support mental health initiatives, we are now set to launch the Collaborative Projects in the fall of 2020.

The following is a snapshot of the Collaborative Projects and the partners involved in each.

## UPCOMING COLLABORATIVE PROJECTS

### Transitional-Aged Youth Coordinated Care Project

**Sub-Region:** South Simcoe

**Partners:** Catholic Family Services of Simcoe County (Lead), South Simcoe Police Service, CMHA York Region & South Simcoe, New Path Youth and Family Services, Gilbert Centre, Youth Haven, CONTACT Community Services, SCDSB, SMCSB

**Project Overview:** Establish a community hub for vulnerable transitional-aged youth (ages 15-28) in South Simcoe to provide a multi-location service for youth during a complex, critical time as they grow up and transition to adult services.

### Furniture Bank RPC

**Sub-Region:** Barrie & Area

**Partners:** Redwood Park Communities (Lead), Furniture Bank Toronto, Furniture Link, Jeff’s Junk, Community Builders

**Project Overview:** Develop and run a low-cost furniture store for individuals and families referred by community partners who can’t afford retail prices, helping clients make their housing into a home. This project will also divert much of the household furniture that ends up in our landfills and provide mentoring and training in furniture repair for individuals facing employment challenges.

### Circles Muskoka

**Sub-Region:** Muskoka

**Partners:** YWCA Muskoka (Lead), CAP Canada, YMCA Employment Services, New Vision Unlimited (The Hub Muskoka), Faith Baptist Church Huntsville, Muskoka Community Church

**Project Overview:** Circles Muskoka brings together the community to support individuals and families living in poverty with enough reason, relationships and resources to thrive. This project will bolster the capacity of Circles Muskoka and allow the delivery of programs to vulnerable residents.

### The GOOD (Goal-Oriented Opportunities for Development) Project

**Sub-Region:** North Simcoe

**Partners:** Gateway Centre for Learning (Lead), CHIGAMIK Community Health Centre, YMCA of Simcoe Muskoka

**Project Overview:** The partners of The GOOD Project will train, place and support participants into long-term employment through support in basic literacy skills, adult upgrading, employability skills, securing employment, workplace retention, overcoming barriers, health, wellness and food security. The project also hopes to increase the number of Living Wage Employers in North Simcoe.

### Poverty Interventions Equal Health Interventions

**Sub-Region:** South Georgian Bay

**Partners:** YMCA of Simcoe Muskoka (Lead), Collingwood General Marine Hospital, Georgian Bay Family Health Team, SGB Community Health Centre, Hospice Georgian Triangle, Breaking Down Barriers, CMHA, Rural Ontario Medical Program, 211/Community Connection, OPP, E3 Community Services, North Simcoe Muskoka LHIN & Home and Community Care.

**Project Overview:** By creating a cloud-based poverty screening tool and case management system, this project addresses poverty as a vital component of the community’s health. This system will allow the network of social service agencies and primary care partners to collaborate and respond to immediate urgent needs of individuals to better serve them with the aim of moving individuals and families out of crisis to stability and, when possible, self-sustainability.

### Feather Carriers Leadership for Life Promotion

**Sub-Region:** Orillia & Area

**Partners:** CMHA Simcoe County (Lead), Barrie Area Native Advisory Circle (BANAC), The Gilbert Centre

**Project Overview:** This project will reconnect Indigenous peoples with their culture, each other, their community and to life. It includes knowledge sharing, self-reflection and practical application for individuals and organizations. The project will also provide training for people and organizations on culturally safe services for Indigenous community members affected by poverty and will incorporate Safer Spaces diversity and inclusion training.





# YOUTH UNITED

Each year, United Way Simcoe Muskoka provides grants to projects across our communities that are both created and led by local youth. These young changemakers are between the ages of 14 and 24 and use their creativity and innovation to make immediate local impact.

In 2019, these were the five incredible projects created by our Youth United recipients:



**Assikinack Elementary’s Mental Health Awareness Team** planted new trees and built an outdoor obstacle course to make their schoolyard theirs again after vandalism left almost no usable outdoor space.

**The Innisfil Festival of Colours** was a 5km Colour Run/Walk through chalk clouds that inspired school involvement, got people active and brought some cultural awareness of a Hindu celebration.

**The Nighthawks Lunch Program** provided a healthy lunch to 72 children a week and ensured that kids got the nutrition they need to succeed in school and be their best.

**SASSY Snacks** purchased Good Food Boxes, fresh produce and other supplies to make and deliver healthy, tasty snacks to students at four elementary schools in Midland.

**The Self-Care Sanctuary** offered a personal health day for women and children experiencing issues due to poverty. It included a self-care talk, free salon services, a healthy lunch, a yoga session and a take-home self-care package.

472

Youth engaged through...

5

Projects to help their communities, led by...

30

Youth leaders who contributed...

626

Hours to planning and running these great events!



# WOMEN UNITED

Women United is an inclusive, vibrant group bound by a powerful sense of belonging—to one another, to our communities and to the mission of transforming the lives of Simcoe Muskoka girls, women and their families. This group of donors directs their donations to important initiatives throughout our communities that assist women and girls.

In 2019, Women United distributed \$45,000 to fund:

## Getting Ahead in a Just Gettin’ By World – YWCA Muskoka

A program to provide support and develop skills which help girls and women in Bracebridge move out of the cycle of poverty. Over 15 weekly sessions, participants came together to understand and break down the barriers preventing them from achieving their goals, emerging with a plan they can act upon.

## Professional Women’s Group Mentoring Program – Dress for Success Orillia and Barrie

A program to help participants retain employment and develop professional skills, allowing them to continue to work toward economic independence.

## Taking Charge of Our Lives – John Howard Society of Simcoe & Muskoka

An empowerment program for women and girls that focused on building life skills and strategies to help participants overcome barriers that stand between them and their potential. Groups operate in Collingwood, Orillia and Barrie.

1 in 5

Women experience some form of abuse in their intimate relationship

9%

Of senior corporate jobs in Canada are held by women

6200

Women and children in Canada rely on shelters each night to be safe





# CONTRACT SERVICES

One of the ways that United Way Simcoe Muskoka differentiates itself from other charities and ensures efficiency in our operations is through services that generate earned revenue. This revenue helps offset operating and administrative costs, making every donor dollar go as far as possible in our communities.

At United Way Simcoe Muskoka, we administer a federal program, Reaching Home, to help organizations provide housing supports to rural and remote Ontario communities and we deliver direct services through the Low-Income Energy Assistance Program.

## REACHING HOME

Working with the Government of Canada, United Way Simcoe Muskoka acts as the administrator, or Community Entity, for the federally funded Reaching Home to support rural and remote communities across Ontario.

Reaching Home is a community-based program aimed at preventing and reducing homelessness by providing direct support and funding to Designated Communities (urban centers), Indigenous communities, territorial communities and rural and remote communities across Canada.

At UWSM, we receive, review and approve applications for Reaching Home projects across Ontario in conjunction with our volunteer Regional Advisory Board. Using the revenue generated by administering this program for the Government of Canada, we offset some of the operational costs of our organization. Here are the results of Reaching Home in 2019.

25

Projects to help those experiencing or at-risk of homelessness

\$1,591,986

Invested in rural communities across Ontario

106

Simcoe Muskoka residents age 16+ avoided homelessness

“We have been able to provide hope when none existed, we were able to keep people warm and housed when there were few options for them and we were able to offer compassion during some of the darkest days.”

- Haliburton Heat Bank (Wilberforce)

“[Our] client first came into the housing program in the fall suffering from undiagnosed schizophrenia for which he was self-medicating with opiates. He had been experiencing hallucinations since his teenage years but remained unsupported into his early 20s. After a few weeks of intensive supports the housing worker was able to help him obtain supportive housing attached to mental health and addictions supports. Fast forward six months and this client is **working towards apprenticeship in a high-demand trade**. He has **not used drugs** since obtaining these supports and has received a proper diagnosis and is now well supported in his mental health. He thanked the housing worker in what was an emotional moment and stated that **this program literally saved his life.**”

- Coordinated Community Homelessness Prevention & Outreach (Owen Sound)

# LOW-INCOME ENERGY ASSISTANCE PROGRAM

In the UWSM offices, we run a call centre for the Low-Income Energy Assistance Program (LEAP). By partnering with Ontario utility companies—both locally and province-wide—the LEAP call centre connects Ontarians in utilities arrears with grants and payment programs offered by the caller’s utility company.

For administering this program, UWSM receives fees from the utility companies that not only cover the cost of employment for our call centre team but also help reduce administration fees in our community work.

Every year, the LEAP call centre receives thousands of calls and issues millions of dollars in utility relief. Without these services, countless Ontarians might be without electricity or gas, while others might never be able to get out of utility debt.

110

Province-wide program partners

9

Local jobs created

41,854

Incoming calls managed

12,977

Low-income Ontario households assisted

\$4,696,426

In grants distributed to Ontarians in need







# **IN THE COMMUNITY**

**GenNext**

**Living Wage**

**Film Screenings**

**Holiday with a Hero**



# GENNEXT

GenNext is a group of young professionals and emerging leaders who connect with others via special events and social media to foster better awareness of pressing poverty-related needs and to see how they can help build stronger communities. As adults in their 20s and 30s, GenNexters are the largest living generation and are more purpose- and passion-driven than many of their peers and coworkers. Through meaningful engagement and volunteer opportunities, GenNext helps educate and motivate others while having a lot of fun.

In 2019, GenNext hosted two events that provided attendees a chance to connect with peers and better understand key local issues driving UWSM’s poverty work.

### The Mix n’ Learn Cooking Class

In May, GenNext put on a cooking class to help participants learn some recipes that are not only good for you but are cost-effective and go a long way in stretching your budget without sacrificing flavour or quality. Throughout the class, we learned about food insecurity and how it affects Simcoe Muskoka residents.

At the end of the class, everyone went home with a GenNext Cookbook including recipes from the class and a bag of groceries used to make some of those recipes. There were also prizes for those who attended. Groceries and prizes were graciously donated by event sponsors.

### Speed Networking

Hosted at the Collingwood Brewery, the GenNext Speed Networking night paired young professionals with more experienced counterparts in a speed dating format. Each pair just had a few moments to chat, network and learn about one another’s career experiences before the young professionals rotated tables.

During the event, professional headshots were provided for the young professionals and they also received some cheat sheets for their resumes and LinkedIn profiles to help them find stable, meaningful employment.



# LIVING WAGE

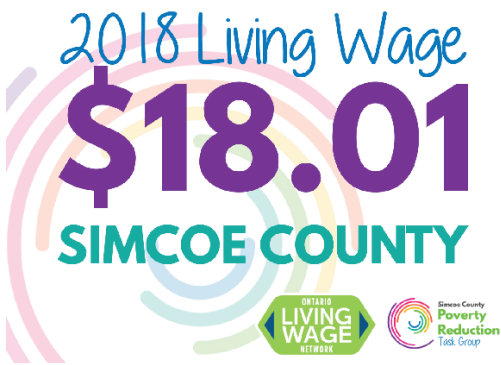


On November 1, 2019, United Way Simcoe Muskoka was certified by the Ontario Living Wage Network as part of the first cohort of Living Wage Employers in Simcoe County. UWSM was granted the designation of champion supporter, which means that 100% of all staff, including contract employees and any future hires, are compensated at no less than the living wage.

Living wage in Simcoe County is \$18.01/hour and is calculated using factors that ensure a basic standard of living. The result is much different than minimum wage, which is set by the provincial government. Living wage takes into account necessities for social, mental and physical health. This includes rent, utilities, transportation and healthy food, among other basic needs.

Calculated most recently in 2018, the living wage for Simcoe County gives an updated view of the cost of living in our communities. This helps take into account inflation and region-specific costs, which minimum wage does not. By providing employees with a living wage, we are ensuring our team can lead secure, healthy lives with less of a financial strain.

We are also strong advocates for encouraging other workplaces in Simcoe Muskoka to become Living Wage Employers and look forward to welcoming more organizations as Living Wage Employers as this meaningful work continues! Click or tap the Living Wage Employer badge to learn more from our blog!





# FILM SCREENINGS

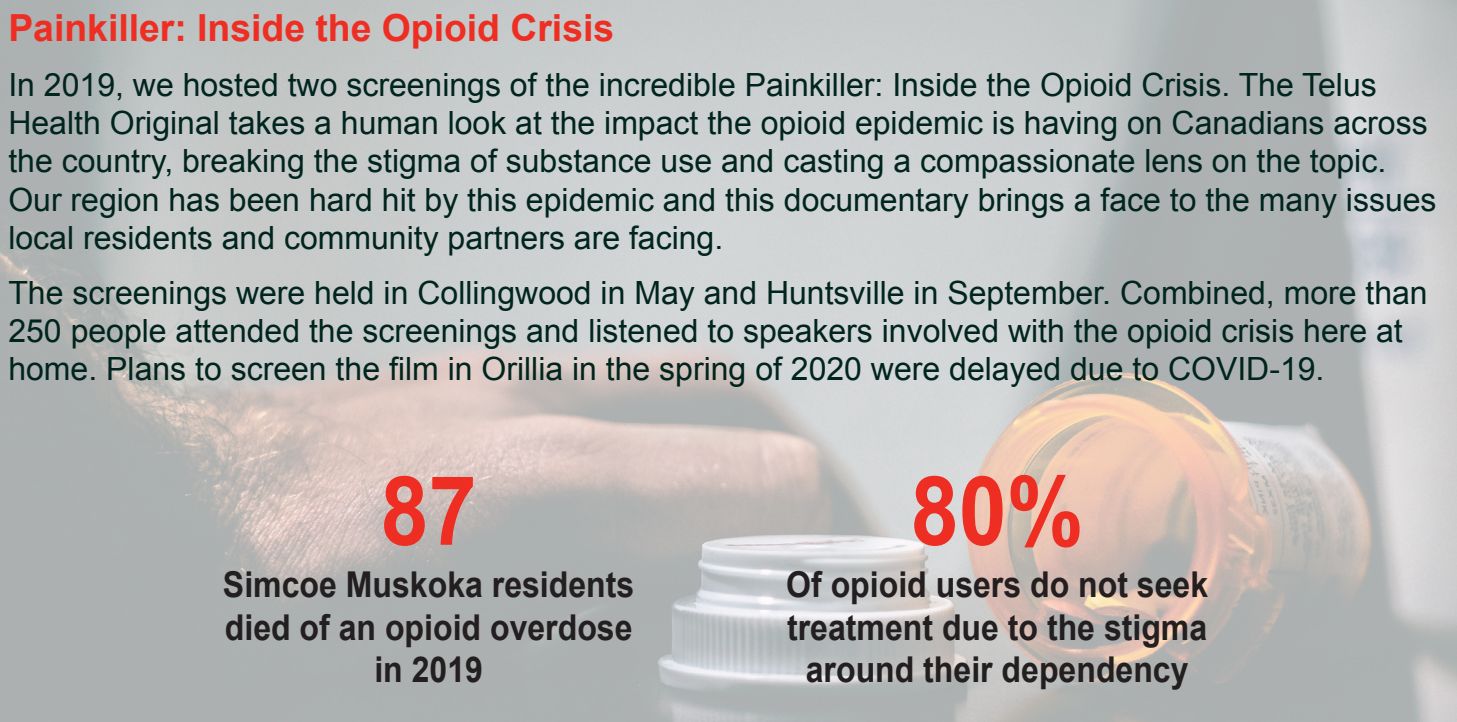
Throughout the year, United Way Simcoe Muskoka hosts our signature film screening events. These events invite our donors and community members to come and view an impactful, educational film that speaks to one of the prevalent social issues we face here in Simcoe Muskoka.

These film events include speakers with lived experience and leaders in our communities who are working on the frontlines of the issues we discuss. By combining great, Canadian films and powerful speakers, we help further our residents' understanding of needs that often go unnoticed or ignored.

### Painkiller: Inside the Opioid Crisis

In 2019, we hosted two screenings of the incredible Painkiller: Inside the Opioid Crisis. The Telus Health Original takes a human look at the impact the opioid epidemic is having on Canadians across the country, breaking the stigma of substance use and casting a compassionate lens on the topic. Our region has been hard hit by this epidemic and this documentary brings a face to the many issues local residents and community partners are facing.

The screenings were held in Collingwood in May and Huntsville in September. Combined, more than 250 people attended the screenings and listened to speakers involved with the opioid crisis here at home. Plans to screen the film in Orillia in the spring of 2020 were delayed due to COVID-19.



87

Simcoe Muskoka residents died of an opioid overdose in 2019

80%

Of opioid users do not seek treatment due to the stigma around their dependency

## Us & Them

In December, when snow and biting cold were a bitter reality for those living on the streets, United Way Simcoe Muskoka returned to Collingwood to host a screening of Us & Them, a documentary about homelessness and addiction.

Us & Them is the empathetic telling of the stories of five individuals who are experiencing homelessness and addiction, and their struggle to overcome these challenges. The factors that contribute to lives lived and lost, and the deadly reality of homelessness and substance dependency reinforced the need to address this locally.

697

Simcoe Muskoka residents reported being homeless, with 3x more considered 'hidden homeless'

1 in 3

Simcoe Muskoka residents experiencing homelessness did so before their 18th birthday

# HOLIDAY WITH A HERO



Working alongside Base Borden, the Ontario Provincial Police and Simcoe Muskoka Family Connexions, United Way Simcoe Muskoka planned Holiday with a Hero, a heartwarming and life-changing event for both low-income youth and youth who have experienced trauma in their lives..

Based on an event that has been successfully run in Chatham-Kent for years, Holiday with a Hero pairs children with local heroes—police, firefighters, paramedics and military personnel—for a day filled with unforgettable activities. In total, 78 children were paired with 85 Heroes and given a gift card for \$113 to shop at the Walmart on Bayfield St. in Barrie. The children used the gift card to buy holiday gifts for their families with only one rule: they had to buy something for themselves, too.

After the shopping was done, the children were part of a Hero convoy to the Barrie YMCA where they partook in a pancake breakfast, gift wrapping, cookie decorating, facepainting, bouncy castles and more.

In total, the event involved more than 150 volunteers, eight community sponsors, dozens of individual donors and some incredible children, but it was a day that no one will forget anytime soon.

To read more about Holiday with a Hero, [click here to read our blog](#).

**“I was able to share a special moment with my 11-year-old child. When shopping for his 18-year-old brother, he came across a game. I watched as he held the game and stared at it for a good two solid minutes. I then asked if he had ever played that game before. He said, ‘My brothers and I used to play this in our old house before we were taken to foster care but were not able to bring it with us, I think I will get it for him so we can play together again.’**

**“It was a pretty touching moment for me.” – Major Wendy Strain, CFB Borden Hero**



A person's hands are shown interacting with a tablet. The tablet screen displays a design application with various panels, including a color palette, a grid of design elements, and a central workspace showing a garment design. In the background, a laptop screen is visible, displaying a document with text and images. The overall scene suggests a digital design or marketing workflow.

# **GOING DIGITAL**

**Online Engagement**

**Salesforce + UWSM**



# ONLINE ENGAGEMENT

One of the biggest challenges that charities face is adapting to a constantly changing era of digital and social media. As we said in our last Annual Report, one of United Way Simcoe Muskoka’s goals for 2019-2020 was to focus on engagement, and that meant working with all the tools available to us.

Throughout the past year, UWSM has been able to successfully use social media platforms, our website and email automation to not only share the work that we are doing, but to provide a more engaging experience for our donors. We are living in a world where donors want to see the impact of their gifts, and UWSM has aimed to do just that.

On social media, we are active on all major platforms including Facebook, Twitter and LinkedIn. By creating content tailored to each of those platforms individually, we are able to engage both donors who are interested in our work and individuals who look to us for help. In 2019, we also started using Instagram to engage Millennials and Gen Z donors and volunteers. Instagram has proven to be very successful and we have gained hundreds of followers since launching on that platform.

7%

Increase in impressions  
on Twitter vs 2018-19

14%

Increase in followers  
on Facebook vs 2018-19

Part of our communications strategy throughout 2019 and moving forward involved regular blog writing and email communications with our donor base and newsletter subscribers. Prior to 2019, communication with donors was limited to a quarterly newsletter. With regular blogging based on the work UWSM does and the needs in our communities, we continue to establish ourselves as an authority in the social services sector.

This content creation strategy goes hand-in-hand with our refreshed email communication plan, which provides small updates to donors and subscribers on a biweekly basis. By continuing to engage our donors through this strategy, we make the donor experience more personal and fulfilling, adding even more meaning to their gift.

45%

Email open rate  
vs 30% industry average

8%

Click-through rate  
vs 2-3% industry average

# SALESFORCE + UWSM

As our world continues to become more connected and more technologically advanced, it’s difficult for organizations like charities and non-profits to keep up. The needs of the community and our most vulnerable are prioritized over having the newest things, primarily due to cost; it’s not uncommon for a charity to be filled with people who will wear many hats if it means more dollars get reinvested in the community rather than getting the latest tools.

Luckily, UWSM has been able to streamline the systems that are available to us and, as a result, we are a leader in the industry through the use of our Customer Relationship Management platform, Salesforce.

But why does that matter?

Ultimately, this streamlining leads to efficiency and, in turn, more time and money saved on processes so we can invest more into the community. All of this has been thanks to some incredible in-house work to create a custom platform experience that supports these major areas of our work:

## Fundraising and Finance

Within Salesforce, our donor and gift information is kept in one place that integrates directly with our financial systems. This allows for easy, accurate and timely receipting for our supporters and accurate reporting that lends to the efficiency of our great finance staff.

As UWSM continues to modernize, we are also developing an online pledge system that integrates with our database and will help mitigate the tens of thousands of pledge forms that are needed every year. Starting in 2021, our accounts can move to this new system that not only helps save our environment through less waste but reduces the need for manual counting and recording of pledges. This frees up valuable time that will be spent supporting our community instead.

## Donor Communications

New this year, our email communications now utilize Pardot, a Salesforce-integrated application that matches up email profiles with donor records. While this might not seem exciting, it means that less time is spent reconciling information from a third-party email system with our records and—more importantly—means that our supporters can receive information they care about based on their interests and gifts.



## Community Impact

Lastly, we have been able to use our database to build application portals to accept applications for projects like the upcoming Collaborative Projects, Youth United, Women United, Reaching Home and our LEAP call centre. Rather than the cumbersome and inefficient system of email applications or—in some cases—applications submitted via a fax machine, our work with Salesforce makes applying for funding or assistance easier than ever.

The best part is that this efficiency extends to the charities submitting the applications, freeing up more of their own time to continue the vital work that they do in our communities.

As we continue working to streamline our processes through our integration with Salesforce and other platforms, it will only mean that more time and donor dollars are freed up to help the most vulnerable in our communities.



A close-up photograph of a person's hand gently holding an elderly person's arm. The elderly person's arm is wrinkled and has a blue medical bandage around the wrist. The background is blurred, showing a person in a blue shirt.

# **FINANCES**

**Treasurer's Report**

**Financial Statements**



# Treasurer's Report 2020

Fiscal 2020 was a year for United Way Simcoe Muskoka (UWSM) to regroup and refocus our financial planning towards our six new Collaborative Projects that will roll out in our communities this fall. We started the year off completing a challenging financial accounting system conversion that has yielded better reporting while allowing more manageable, timely data entry. This enabled the UWSM finance team to provide more up-to-date information to help us navigate the waters ahead.

As UWSM refocused towards a new multi-year funding model, it meant scaling the budget down where possible to meet our goals. Our direct expenses, which included expenses for our Community Impact, were reduced by over \$250,000 in fiscal 2020 while our indirect expenses were reduced by almost \$50,000. These savings will be redirected towards our new funding model beginning this fall.

Although this has been a year for saving, UWSM's presence in the community continued to have an impact. While consulting with our community partners about the new multi-year funded projects, we identified a gap in existing services. The Urgent Needs Fund was piloted to help fill that gap by providing timely, modest grants where community resources had been exhausted. Following the success of this pilot, the Urgent Needs Fund has been continued to address the needs of individuals in low-income households who have been economically impacted by COVID-19. In fiscal 2020, the Urgent Needs Fund put \$60,000 back into our communities.

As much as we were successful in operating on a reduced budget, we were also successful in continuing our efforts for donor diversification. With workplace campaigns on the decline in recent years, our Resource Development team was put to task in discovering new sources of revenues and new ways to attract the next generation of donors. These efforts in fiscal 2020 resulted in an increase of \$75,000 in campaign gifts and \$18,000 in major gifts. Offset by the decline in workplace campaign pledges, UWSM saw a net increase of \$51,000 (3.4%) in campaign revenues.

The increased revenues combined with the decreased direct and indirect expenses resulted in an excess of revenue over expenditures of \$233,000 – an increase of \$260,000 over the previous fiscal year. These are funds which will be reinvested into our communities this fall.

Fiscal 2021 has already created its own challenges as we continue to navigate the new landscape that COVID-19 has brought upon us. We are thankful for government initiatives such as the Emergency Community Support Fund and the New Horizons for Seniors funding which we were able to disburse to community partners almost immediately, as well as the Canada Emergency Wage Subsidy which has and will continue to assist our organization keep staff employed through the pandemic.

With a new financial accounting system delivering timely reporting, another modest budget in place, and a continued focus on donor diversification and expansion, we are excited for the year ahead. We look forward to the launch of the new Collaborative Projects and the meaningful impact they will have in improving lives and building stronger communities.

**Michael Blackburn**, CPA, CA  
Treasurer  
United Way Simcoe Muskoka

Statement of Operations\*  
Year ending 31Mar20

	2020	2019
<b>REVENUES</b>		
Donations and special events revenue	1,237,766	1,160,108
Funds transferred from other United Way Centraide's	388,889	419,006
<b>Campaign revenue</b>	<b>1,626,655</b>	<b>1,579,114</b>
Less: Uncollectable pledges	(64,067)	(68,000)
<b>Net campaign revenue</b>	<b>1,562,588</b>	<b>1,511,114</b>
Investment income	8,912	38,761
Administrative fees	1,022,945	1,087,746
	<b>2,594,445</b>	<b>2,637,621</b>
<b>EXPENDITURES</b>		
<b>Direct expenses</b>		
Resource development	477,864	470,702
Community impact	511,306	802,520
Social enterprise	550,881	521,625
	<b>1,540,051</b>	<b>1,794,847</b>
<b>Indirect expenses</b>		
Salaries and employee benefits	467,181	388,111
General and administrative	327,928	447,271
Amortization	26,213	34,635
	<b>821,322</b>	<b>870,017</b>
<b>Excess (deficiency) of revenues over expenditures for the year</b>	<b>233,072</b>	<b>(27,243)</b>

Statement of Financial Position\*  
As of 31Mar20

	2020	2019
<b>ASSETS</b>		
<b>Current</b>		
Cash	646,137	368,541
Restricted cash	881,884	543,150
Short term investments	209,680	147,639
Pledges receivable	485,523	633,101
Accounts and grants receivable	37,295	261,017
Prepaid expenses	47,588	43,229
<b>Total current assets</b>	<b>2,308,107</b>	<b>1,996,677</b>
Capital assets (net)	91,793	109,815
Long-term investments	383,222	404,916
<b>Total assets</b>	<b>2,783,122</b>	<b>2,511,408</b>
<b>LIABILITIES AND NET ASSETS</b>		
<b>Current</b>		
Accounts payable and accrued charges	223,373	374,214
Accounts payable - Donor's choice	214,029	233,899
Deferred grant and other revenue - short term	1,095,484	919,538
Allocations payable to member agencies	583,407	550,000
<b>Total current liabilities</b>	<b>2,116,293</b>	<b>2,077,651</b>
<b>NET ASSETS</b>		
Unrestricted net assets	292,482	41,388
Net assets invested in capital assets	91,793	109,815
Collaborative Reserve Fund	75,000	75,000
Transformation Reserve Fund	100,000	100,000
Strategic Reserve Fund	104,180	104,180
Forever Reserve Fund	3,374	3,374
	<b>666,829</b>	<b>433,757</b>
	<b>2,783,122</b>	<b>2,511,408</b>

\*Please note: Financial Statements are audited by Grant Thornton LLP and remain in draft form until approved by United Way Simcoe Muskoka members at the Annual Meeting September 16, 2020. Full financials with notes and schedules may be made available to the public after that time.

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A photograph of two men smiling outdoors. The man on the left has a beard and is wearing a blue shirt. The man on the right has glasses and is wearing a yellow shirt. They are standing in front of green foliage. A large red semi-transparent rectangle is overlaid on the right side of the image, containing white text. In the background, several hands are visible, suggesting a group activity or a community event.

# **OUR SUPPORTERS**

**Event Sponsors**

**Volunteers**



# EVENT SPONSORS

## Painkiller Film Screening - Collingwood



## Painkiller Film Screening - Huntsville



Muskoka Medical Centre Pharmacy  
Mitchell Funeral Home

Kiwanis Club of Huntsville Muskoka  
BIA Huntsville

## Holiday with a Hero



Alectra  
Baytowne Hyundai

Enbridge Gas  
Ontario Insurance Adjusters Association

Quota International of Barrie

## Us & Them



## GenNext Event Sponsors



## Media & Labour Sponsors



# VOLUNTEERS

## Board of Directors

<b>David Mayers</b> Board Chair	<b>Mary Ferguson</b> Board Vice-Chair	<b>Michael Blackburn</b> Treasurer
<b>Michelle Cellucci</b> Board Director	<b>Carolyn Moran</b> Board Director	<b>Deborah Burrows</b> Board Director
<b>LCol Charleen Coulbeck</b> Board Director	<b>David White</b> Board Director	<b>Christopher Shultz</b> Board Director
<b>Valerie March</b> Board Director	<b>Shannon Scott</b> Board Director	<b>Jonathan Wiersma</b> Board Director

## Community Impact Standing Committee

<b>Michelle Cellucci</b> Committee Chair	<b>Jonathan Wiersma</b>	<b>Doriano Calvano</b>
<b>John Pugsley</b>	<b>Lisa Rhodenizer</b>	<b>Lora D'Ambrosio</b>
<b>Lorraine Sutton</b>	<b>Pam Hillier</b>	<b>Shawn Fendley</b>
<b>Suzie Addison-Toor</b>		

## Community Impact Council

<b>Amanda Pegg</b>	<b>Amy Seymour</b>	<b>Errin Dickins</b>
<b>Glenn Fernandes</b>	<b>Jacqui Woods-Powell</b>	<b>Joy Martin</b>
<b>Joy Packham</b>	<b>Michelle Marchand</b>	<b>Ruby Young</b>
<b>Tracy Mitchell-Ashley</b>		

## Reaching Home Regional Advisory Board

<b>Angie Lynch</b>	<b>Insp. Angie McCollum</b>	<b>Debra Swan</b>
<b>Doriano Calvano</b>	<b>Gail Spencer</b>	<b>Holly Howard</b>
<b>Randy Pitt</b>	<b>Tracy Lasook</b>	

## External Relations Committee

<b>Mary Ferguson</b> Committee Chair	<b>Deborah Burrows</b>	<b>John Arruda</b>
<b>LCol Charleen Coulbeck</b>		



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YOUR  
LOCAL  
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