



# 2020-2021 Annual Report

A year unlike any other



**United Way  
Centraide**  
Simcoe Muskoka

# Overcoming a global crisis, together

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We all have stories about our pandemic experience. Organizations are no different. In fact, Canada's non-profits and charities in many instances were called upon like no other time before. That was our experience. The pandemic was declared, and lockdowns started just as our fiscal year began.

There are so many themes that have been explored to describe how each of us individually and collectively have navigated Covid. One is resilience. Looking through this annual report I think it is an apt characterization of our organization and our sector.

UWSM was able to respond to the varying and continually increasing needs of people across our communities as the pandemic made regular living even harder for those already vulnerable. Our donors stepped up in ways that warmed our hearts and made it possible for us to shift a pilot program – our Urgent Needs Fund – into a Covid variation that supported people in urgent and emergency circumstances through to the end of the year.

Guided by the increasing severity and unknowable consequences of the fast-spreading virus, UWSM was well positioned to respond to the federal government's funding initiatives; the Emergency Community Support Fund addressing broad community needs and New Horizons aimed at seniors. In addition, while already managing the Reaching Home – Rural and Remote program that focuses on supporting housing needs, UWSM was provided with significant additional funding to address a situation made worse by the need to provide safe physical distancing or isolation due to quarantine.

The six multi-year poverty reduction and social inclusion projects that were set to launch across Simcoe-Muskoka - the culmination of our new funding framework, together with exceptional planning, commitment and creativity by the collaborating partners - were all sidelined as organizations had to focus on delivering their services in ways never envisioned. I am happy to report that three were able to start late in the year and you can read about those in this report. The remaining projects will start in 2021-2022.

Those of you that know UWSM have seen us build a more resilient organization through diversifying our revenue sources and ensuring that we are not dependent solely on philanthropy. Our social enterprise Call Centre which has for years delivered the *Low Income Energy Assistance Program* was virtually shuttered as our provincial government and the utilities we work with prevented further hardship on households through disconnections - the right response - but left us with significantly lowered revenue.

Many of our long-standing supporters were not able to continue their giving, and we hope to see that giving return as our economy recovers. We know this return won't happen automatically, but from our organizations's proven ability to demonstrate resilience and be there for our communities - through this pandemic and after it.

But we shouldn't continue to expect resilience to be an overarching requirement of our sector. The publication Future of Good reported in a recent article:

- Justin Wiebe, a partner at Mastercard Foundation, noted "resilience for certain communities becomes so normalized that it takes it out of the minds of policy makers and decision makers and funders – that we no longer have to address those root issues, because those communities have become so used to being resilient that it becomes the normal."
- Organizational resilience encourages working in crisis mode. Doug Pawson, executive director of advocacy group End Homelessness St. John's, said operating on shoestrings budgets is not something to be proud of: "We talk about our sector providing a ton of really important value, but we use a very neoliberal lens to assess that – it's dollars and cents."
- Katherine Hay, CEO of Kids Help Phone, added normalizing resilience among staff is harmful too: "There is no sustainability if we expect our people to go through crisis after crisis and keep giving."

We know firsthand that everyone who has reached out to us in this exceptional year has reached out in service and generosity intended for those that were impacted the most. Please accept our unconditional gratitude for your kindness. We hope that the humanity shown by so many will continue as a legacy of this most unprecedented time.



Dale Biddell  
CEO  
United Way Simcoe Muskoka



David Mayers  
Board Chair  
United Way Simcoe Muskoka

# Local Love in a Global Crisis

March 2020 saw the start of a worldwide pandemic that we continue to feel the effects of to this day. It marked the beginning of incredible uncertainty, hardship, unemployment and loss.

Through it all, United Way Simcoe Muskoka was there for our most vulnerable residents. Early on in the pandemic, we funded increased mental health services and expanded our Urgent Needs Fund. Not only that, but UWSM also partnered with the Government of Canada to assist seniors and those experiencing homelessness and to increase the capacity of local community organizations, ensuring those most affected by the pandemic had the right supports.

## MENTAL HEALTH SUPPORTS

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As the pandemic accelerated, UWSM knew that it was not just the virus that posed a threat to our communities, but the effects of social isolation as well. To help our communities, we immediately funded mental health supports across Simcoe Muskoka through YWCA Muskoka, The Gilbert Centre and Catholic Family Services Simcoe County.

These supports included self-care workshops, shelters and outreach programs, and the virtual delivery of critical programs.

# 927

CLIENTS SERVED THROUGH  
MENTAL HEALTH SUPPORTS

# \$35,000

TOTAL FUNDS DISTRIBUTED

**"Thanks, for providing a down to earth approach to self-care and for validating the concerns and stressors that we face as helping professionals. What a terrific experience. Thank you for your knowledge and expertise."**

**"Thank you for continuing your very important work during this time of uncertainty and stress. Your help and support are greatly appreciated."**



## NEW HORIZONS FOR SENIORS PROGRAM

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One of the first programs that UWSM partnered with the federal government for was the New Horizons for Seniors Program. Through this program, UWSM made sure local services were available for seniors during the earliest months of the pandemic.

This program ensured seniors had access to technology, groceries, PPE, wellness check-ins and supports for mental health and social isolation.

**\$137,000**

TOTAL FUNDS DISTRIBUTED

**12**

ORGANIZATIONS FUNDED

**2,513**

VULNERABLE SENIORS ASSISTED

### IMPACT: SUPPORTING VULNERABLE SENIORS

Through New Horizons for Seniors, UWSM helped:

- A woman living on a fixed income get a new prescription and glasses to help lessen the pain in her eyes.
- Seniors without transportation get their groceries delivered.
- Install air conditioning for a senior with none so she could be comfortable through a summer of record-breaking heat.
- Patricia, an 87-year old woman living in social housing, get a single bed so she would not have to sleep on a couch anymore.
- Filomena, a widow also living in social housing, complete her taxes and participate more in her new community.
- Provide technology for seniors across Simcoe Muskoka so they could keep in touch with family and social workers while staying safe.

## EMERGENCY COMMUNITY SUPPORT FUND

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Millions of Canadians rely on charities and non-profit organizations just to get by, but these same organizations were some of the hardest hit during this past year. With a drastically increased need and a sector-wide decline in donations, charities and non-profits were needed more than ever but lacked the resources to handle the COVID-19 crisis.

By partnering with the Government of Canada, the Canadian Red Cross and the Community Foundations of Canada for the Emergency Community Support Fund, UWSM provided local organizations with the funding they needed to adapt their services and continue to provide vital supports for the most vulnerable residents of Simcoe Muskoka.



# 82,148

PEOPLE ASSISTED

# \$1,744,000

DISTRIBUTED TO SIMCOE MUSKOKA  
CHARITIES AND NON-PROFITS

# 61

LOCAL PROJECTS FUNDED

### IMPACT: FROM MUSKOKA VICTIM SERVICES

"A mother reached out to MiND-AID for help for her 22-year old daughter, who was looking to escape being trafficked and wanted help ending her drug addiction. Her daughter had been hospitalized after being violently sexually assaulted at age 17, which was followed by severe trauma responses, and debilitating fear and anxiety. She had turned to illegal drugs to numb her psychological pain and became addicted, which led her to the man who would traffic her. At the time I met her, she had not received any trauma counselling and was on a waiting list for drug rehab that would have her waiting for 8 months to a year for care. I was able ... to get her into specialized local trauma counselling immediately as well as qualify for the highest-quality drug rehabilitation available, something she and her family would never be able to afford. I continue to support this young woman on her journey to mental wellness, thanks to funding provided in part by the United Way."

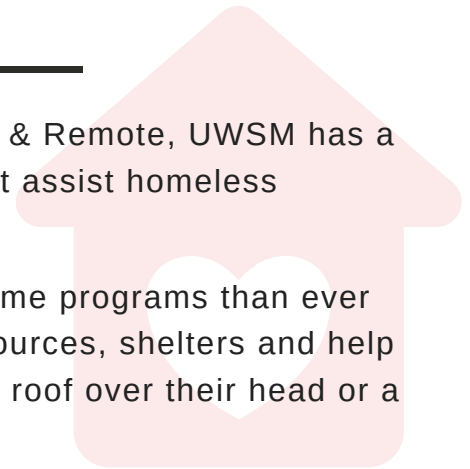
- Muskoka Victim Services, funded through the ECSF

## REACHING HOME

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As the Community Entity for Reaching Home Rural & Remote, UWSM has a long history of reviewing and funding programs that assist homeless Ontarians across the province.

This year, we were able to fund more Reaching Home programs than ever before, for a total of **\$5,575,447**, ensuring that resources, shelters and help were there for those facing the pandemic without a roof over their head or a safe place to sleep at night.



# 79

PROJECTS FUNDED, INCLUDING...

# 55

COVID-SPECIFIC PROJECTS

**"We were able to assist a client with housing who has been waiting for an offer from the Social Housing Division in Cornwall since September 2020. The client has been couch surfing with different friends since leaving her abusive relationship. The client was able to secure market rent housing and we were able to assist her in applying for the Canadian Ontario Housing Benefit which would provide her with subsidy and worked with the city to get the client's last month's rent paid."**

**- Elizabeth Fry Society Ottawa**

# 1,337

PEOPLE WERE  
PROVIDED  
HOUSING

# 145

INDIGENOUS  
PEOPLE  
SUPPORTED

# 623

PEOPLE WITH  
DISABILITIES  
SUPPORTED

# 800

YOUTH (AGE 12-  
30) SUPPORTED

**"We had taken on a resident in Transitional Housing that was wrongly evicted. He was an elderly gentlemen, and his stay with us was to be shorter as the eviction was being appealed to the Tribunal. As it turned out, he was with us for over two years as the landlord appealed and has refused to abide by the tribunal's ruling which was in the client's favour.**

**We have been able to arrange for accommodation in a supportive housing facility better aligned with his health and care needs."**

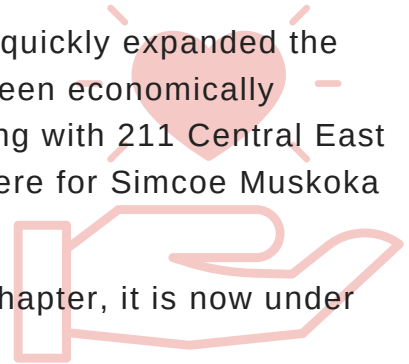
**- The Inn of Good Shepherd**

## URGENT NEEDS FUND

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Despite the UNF pilot ending in March 2020, UWSM quickly expanded the scope of our new initiative to assist those who had been economically impacted by the COVID-19 pandemic. By collaborating with 211 Central East Ontario and our Regional Agency Leads, we were there for Simcoe Muskoka residents when no one else could be.

After the UNF was adopted by another United Way chapter, it is now under review to see how it can be expanded further.



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# 632

GRANTS DISTRIBUTED  
ACROSS SIMCOE MUSKOKA

# \$161,750

TOTAL FUNDS DISTRIBUTED

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# 1,082

SIMCOE MUSKOKA RESIDENTS  
ASSISTED THROUGH THE UNF

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**"I am a single mom with two kids. We were desperate for winter clothing for my kids and myself ... The funds came at a perfect time for us. We are now warm for the winter."**

**"The funds did help me out so much. It relieved my stress so much. You guys have been so welcoming and don't make us feel like we are getting a handout – so we are not embarrassed to ask for help."**

**"We would not have eaten if we hadn't received these funds."**

**"Prevented me from being homeless."**



# Community Collaboratives

In last year's Annual Report, UWSM announced the launch of our new collaborative projects. Unfortunately, the pandemic had different plans.

While we responded to the impact of the novel coronavirus, those involved with and leading the collaboratives had to do the same. As such, three of our original six collaboratives launched in fall 2020: Circles Muskoka, Furniture Bank RPC and YouthCALL Service Link. Here are some results from Nov 2020-March 2021.

## CIRCLES MUSKOKA

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Circles Muskoka is fostering friendships to bridge economic boundaries and create a community that benefits everyone.

**80%**

OF PARTICIPANTS  
FELT SUPPORTED  
DURING THE  
PANDEMIC

**70%**

OF PARTICIPANTS  
FELT THEY HAD  
INFLUENCE IN  
THE COMMUNITY

"I feel like I am part of a community and am gradually growing since the death of my husband that left me heartbroken and financially insecure. The Circles community has welcomed me. I feel part of something which has helped me with my grieving and move on to do things I need to do."

## PENDING COLLABORATIVES

The three remaining collaboratives - Poverty Interventions Equals Health Interventions (South Georgian Bay), Feather Carriers (Orillia and Area) and The GOOD Project (North Simcoe) - were significantly impacted by the pandemic.

With many partners in healthcare, Poverty Interventions was delayed as these partners were focused on getting vaccines out in our communities. The project is now underway in developing a customized software to connect health and social services. Feather Carriers was also delayed, but has been transformed to a virtual delivery model and has rebranded as Wiijinokiiwag, a Gathering Our Bundles initiative.

Unfortunately, the strain of the pandemic has stopped The GOOD Project from being able to proceed. After an additional review of the North Simcoe region, one of our projects - The Furniture Bank - is expanding to serve this area and residents. We look forward to the change The Furniture Bank will drive as it expands outside of Barrie.

## FURNITURE BANK RPC

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The Furniture Bank takes used furniture and upcycles it to help furnish homes of those transitioning out of homelessness, domestic violence or other barriers raised by poverty. In 2021, the Furniture Bank is also launching a social enterprise with their new mobile Bed Bug Remediation service.

**75**

PEOPLE  
BENEFITTED FROM  
ITEMS FROM THE  
FURNITURE BANK

**265.5**

CUBIC METRES  
DIVERTED FROM  
BARRIE LANDFILL

**25**

VOLUNTEERS  
WERE RECRUITED  
TO HELP THE  
FURNITURE BANK

**“You are amazing, thank you so, so, so much ... for all your help. It is much appreciated, we promise to love and take care of everything and [pay] it forward when we can next.”**

## YOUTHCALL SERVICE LINK

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YouthCALL Service Link is a live-answer telephone hotline that is helping transitional-aged youth in South Simcoe. Kim, the Community Navigator, not only connects youth with much-needed but works with them to set and reach goals, plan for the future and is available when these vulnerable youth need them.

This past year, YouthCALL received external funding to expand their services to include transitional-aged youth in Innisfil.

**34**

LOCAL YOUTH  
SERVED

**95%**

GAINED LIFE  
SKILLS AND A  
SENSE OF  
INCLUSION

**“When I first met Kim, she helped me find housing by helping me message or call people for a room. I also sent her a lease to read over with me, as well as getting back into school by planning with me and telling one of the teachers about me. I know I can call Kim for help whenever I need to.”**

# Social Enterprise

United Way Simcoe Muskoka's Low-Income Energy Assistance Program (LEAP) call centre helps connects thousands of low-income Ontarians each year with programs and grants to help with utility arrears and to keep the lights on.

# \$2,489,940.60

IN GRANTS DISTRIBUTED

# 19,216

INBOUND CALLS

# 5,480

LOW-INCOME HOUSEHOLDS  
ASSISTED

## DONOR IMPACT: MPC

An incredible partner, Machine Precision Components (MPC), recognized the need for PPE for charities and frontline organizations early in the pandemic. For our Virtual Day of Caring on August 21, 2020, MPC donated **1,025 face shields** to UWSM. We, in turn, reached out to identify and deliver those face shields to Simcoe Muskoka charities that could not operate remotely.



# Treasurer's Report

Our year ending March 31, 2021, was one of never-ending change. United Way Simcoe Muskoka (UWSM) was constantly put to the test with changes in funding, new government programs, and pandemic-related restrictions that created an urgency for adaptation. After having gone through our accounting system conversion last year, we were well prepared with current and up-to-date financial information.

The audit of the 2021 fiscal year is now complete with our auditors, Grant Thornton LLP, issuing a clean audit opinion. During the year, our CFO, Isaac Osiel, continued to work tirelessly implementing new accounting strategies and internal controls with the goal of facilitating a much smoother audit process than ever before. We were very pleased to hear from Grant Thornton LLP that Isaac and his finance team accomplished that goal, and the audit was completed on time.

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**"OUR TOTAL DONOR DOLLARS FROM CAMPAIGN GIFTS AND PLEDGES WERE DOWN, AND THIS WAS COMMON ACROSS MOST OF THE NOT-FOR-PROFIT SECTOR DURING THE LAST 18 MONTHS."**

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Excerpts from our audited financial statements are shown following this report and include our Statement of Operations and Statement of Financial Position as of March 31, 2021. Beginning with revenues, we saw donations and special events revenues decrease \$220,000 (24%). Due to the pandemic, we were unable to host, nor be the participant in, any special events. Our total donor dollars from campaign gifts and pledges were down, and this was common across most of the not-for-profit sector during the last 18 months.

While our dividend and interest revenues were also down, the markets had fortunately rebounded by March 2021 and we saw an increase in unrealized gains within our investment accounts which contributed to our overall investment revenue increase of over \$200,000.

Administrative fees are earned by UWSM when we administer grant funding to support various government programs. With the Low-income Energy Assistance Program (LEAP) on hold for many months of the year, we were fortunate to see many government programs expand funding while also becoming the administrator for the Emergency Community Support Fund. Although our LEAP fees were down \$307,000 (46%) we earned upwards of \$860,000 by

# Treasurer's Report

administering these new and expanded government programs. The highlight of these fees is that it also means our UWSM team processed more than \$10.5 million dollars of support into our communities during the pandemic – an increase of \$4.9 million over our last fiscal year.

In response to the COVID-19 pandemic, the Government of Canada committed to provide various forms of relief. UWSM was eligible for the Canada Emergency Wage Subsidy (CEWS) and the Canada Emergency Business Account (CEBA). CEWS provided us with total subsidies of \$462,000 while the CEBA provided another \$10,000. These two forms of government assistance helped us immensely in keeping our staff employed throughout the past year.

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**"...OUR UWSM TEAM PROCESSED MORE THAN \$10.5 MILLION DOLLARS OF SUPPORT INTO OUR COMMUNITIES DURING THE PANDEMIC – AN INCREASE OF \$4.9 MILLION OVER OUR LAST FISCAL YEAR."**

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Our direct expenses were down overall which was largely due to our call centre being closed while LEAP was on hold. The contrasting increase was the direct expense of the funds starting to flow out to our Collaborative Projects that have started. Indirect expenses were also down approximately 10%, mostly as a result of salaries and employee benefits as we had a lower administrative headcount during the year.

Overall, our excess of revenues over expenditures for the year was up approximately \$1 million dollars. In summary, this was a result of \$860,000 of pandemic-related program administrative fees, \$472,000 of government assistance, and a contrasting decrease in campaign revenue of \$260,000.

I'd like to personally thank the hard-working and dedicated UWSM staff and volunteers who persevered through the most challenging year. A special thank you to Isaac, Kerry, and Katie who have improved our financial processes and reporting to provide timely and accurate information to management and the Board.

Michael P. Blackburn, CPA, CA  
Treasurer  
United Way Simcoe Muskoka



## REVENUES

Donations and special events revenue  
Funds transferred from other United Way Centraides

### Campaign revenue

Less: Uncollectable pledges

### Net campaign revenue

Investment income  
Administrative fees  
Government assistance

### Direct expenses

Resource development  
Community impact  
Social enterprise

### Indirect expenses

Salaries and employee benefits  
General and administrative  
Amortization

### Excess (deficiency) of revenues over expenditures for the year

2021

939,045  
427,184

**1,366,589**

(65,844)

**1,300,745**

210,341

1,469,786

472,112

**3,452,984**

604,505

510,428

361,857

**1,476,790**

370,584

346,226

22,476

**739,286**

**1,236,908**

2020

1,237,766  
388,889

**1,626,655**

(64,067)

**1,562,588**

8,912

1,022,945

-

**2,594,445**

477,864

511,306

550,881

**1,540,051**

467,181

327,928

26,213

**821,322**

**233,072**

## ASSETS

### Current

Cash  
Restricted cash  
Short term investments  
Pledges receivable  
Accounts and grants receivable  
Prepaid expenses

### Total current assets

Capital assets (net)  
Long-term investments

### Total assets

## LIABILITIES AND NET ASSETS

### Current

Accounts payable and accrued charges  
Accounts payable - Donor's choice  
Deferred grant and other revenue - short term  
Allocations payable to member agencies  
CEBA loan payable

### Total current liabilities

## NET ASSETS

Unrestricted net assets  
Net assets invested in capital assets  
Collaborative Reserve Fund  
Transformation Reserve Fund  
Strategic Reserve Fund  
Forever Reserve Fund

2021

2,110,678  
2,314,741  
330,524  
275,322  
64,870  
20,826

**5,116,961**

69,317

455,631

**5,641,909**

2020

646,137  
881,884  
209,680  
485,523  
37,295  
47,588

**2,308,107**

91,793

383,222

**2,783,122**

210,011

198,043

2,587,438

712,680

30,000

**2,116,293**

223,373

214,029

1,095,484

583,407

-

**2,116,293**

1,551,866

69,317

75,000

100,000

104,180

3,374

**1,903,737**

**5,641,909**

292,482

91,793

75,000

100,000

104,180

3,374

**666,829**

**2,783,122**

# Our Volunteers

## BOARD OF DIRECTORS

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**David Mayers**

Board Chair

**Mary Ferguson**

Board Vice-Chair

**Michael Blackburn**

Treasurer

**David White**

Board Director

**Carolyn Moran**

Board Director

**Deborah Burrows**

Board Director

**LCol Steve Brown**

Board Director

**Valerie March**

Board Director

**Shannon Scott**

Board Director

**Jonathan Wiersma**

Board Director

**Paul Chapman**

Board Director

## COMMUNITY IMPACT STANDING COMMITTEE

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**Jonathan Wiersma**

**Michelle Cellucci**

**Doriano Calvano**

**John Pugsley**

**Lisa Rhodenizer**

**Lora D'Ambrosio**

**Lorraine Sutton**

**Pam Hillier**

**Shawn Fendley**

**LCol Steve Brown**

**Suzie Addison-Toor**

## REACHING HOME REGIONAL ADVISORY BOARD

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**Debra Swan**

**Doriano Calvano**

**Gail Spencer**

**Holly Howard**

**Sonia Vescio**

**Tracey Lasook**

## EXTERNAL RELATIONS COMMITTEE

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**Mary Ferguson**

**Deborah Burrows**

**John Arruda**

**Paul Chapman**

# Sponsors and Partners

## CORPORATE DONORS

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LCBO

alectra  
utilities



**metro**

Beaver Creek Institution  
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Scotiabank  
RBC Foundation  
Farm Business Consultants  
Black and McDonald Group Limited  
Reliance Comfort Limited  
Intact Financial Corporation  
Farm Credit Canada  
A&W High Voltage Contracting  
Canplas Industries Ltd.  
LIUNA Local 183

Tatham Engineering  
Wawanesa Mutual Insurance  
CIBC  
Enbridge Gas Inc.  
Costco Wholesale Canada  
Pilkington Glass of Canada Ltd. NSG  
Glueckler Metal Inc.  
BMO Financial Group  
National Bank  
Canadian Locators Inc.  
The McLean Foundation

## MEDIA SPONSORS

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CENTRAL ONTARIO  
BROADCASTING

**corus.**