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LETTER TO OUR COMMUNITY

Now more than ever, it's important to have a strong and responsive local United Way that is focused on both emerging needs and long-term solutions. During these times of uncertainty and tough economic times, we have inspired hope for today and created opportunities for a better tomorrow.

In 2008, United Way volunteers invested more than \$129,000 in new strategies to increase financial stability within our community. The Financial Stability initiative provides hard-working families struggling to meet basic needs with the tools and skills necessary to become self-sufficient, such as increasing their income, building savings, and gaining assets. Strategies, including financial literacy seminars, credit repair and budgeting programs, job training and placement, will lead to more families achieving a financially stable and independent future in Waukesha County.

We also launched a community effort that connects the growing number of caregivers of older adults to existing resources, information and support. A caregiver support simulation conducted in June of 2008 received national recognition by engaging several business representatives to role play the "real-life scenarios" of caregivers of seniors in Waukesha County. This simulation helped increase awareness of the complexity and realities of care giving and made a connection to the local services that are here to help.

In addition to being focused on long-term change in our community, United Way also invested more than \$1.1 million in programs that are meeting basic needs such as food, housing, healthcare and energy assistance. In December, the United Way Board was able to move swiftly upon hearing the need for additional shelter during the harsh winter months for those

experiencing homelessness. Because of donor support and volunteer leadership, United Way responded by contributing an additional \$20,000 to an emergency temporary shelter that served more than 130 individuals, many of which secured permanent solutions.

One of the most inspiring moments this past year occurred during a phone call from a local family foundation member upon his learning of our fundraising challenges. A significant funding gap projected in late January was closed in large part due to a challenge grant by The Windhover Foundation. This one-time fundraising challenge produced more than \$430,000 in additional support and sustained funding for all United Way initiatives and programs in 2009—quite a demonstration of our community's character, compassion, and willingness to respond when called into action.

Looking to our future, the United Way Board of Directors laid the foundation for growing our organization and its impact. A three-year strategic plan was developed to focus our activities and efforts with an emphasis on demonstrating value, building awareness and understanding, and increasing resources—all to accomplish our mission to build a stronger community and improve lives.

We are proud of our accomplishments this past year. Our sincere appreciation is extended to the thousands of individuals and businesses who demonstrated their confidence in United Way through a financial contribution as well as the important gifts of time and talent as a volunteer. We also applaud the members of our nonprofit community who have worked countless hours to serve those most in need. Thank you. You attest that we LIVE UNITED right here in Waukesha County.



Janet Schulz

Janet Schulz
President
Board of Directors



Jayne Thoma

Jayne Thoma
Executive Director

OUR MISSION

Building a stronger community by uniting people and resources to measurably improve lives.

OUR STRATEGIC DIRECTION

OUR VISION

Waukesha County residents know, understand and support United Way in Waukesha County's mission.

The organization has mobilized more people and resources and formed collaborations that are maximizing results and efficiencies.

Local citizens recognize United Way as a leader in community change and collaboration.

They demonstrate their commitment through increased giving, volunteering, and advocacy around United Way's community and direct impact goals.



THE LIVE UNITED MOVEMENT

LIVE UNITED is a call to action that is based on three engagement strategies: **give, advocate, volunteer**. When you give to United Way, your gift combines with others and accomplishes more than any single gift can on its own. When you advocate, you make change happen with your voice and by taking action. When you volunteer, you share your time and talents with our community and create positive change.

United Way in Waukesha County is working to create opportunities for a better life for all by focusing on the three building blocks of a good life—education, income, and health. We all win when a child succeeds in school, when families are financially stable, and when people have good health.

EDUCATION

Helping Children and Youth Achieve Their Potential

- Increasing parental involvement by **Helping Kids Succeed** through partnering with schools
- Helping parents understand the **Born Learning** benefits of early childhood development leading to school readiness
- Providing after-school and mentoring programs to help with **Youth Development**

INCOME

Helping Families Become Financially Stable and Independent

- Helping hard-working families who struggle to meet basic needs to increase their income, build savings and assets, and achieve **Financial Stability**
- Supporting **Basic Needs** such as housing, employment services, energy assistance, and budget counseling

HEALTH

Improving People's Health

- Making **Transportation Services** available for essential healthcare services or to escape threatening domestic situations
- Providing **Health Services** in medical, dental and mental health-care
- Increasing support for individuals who are caring for an older adult by facilitating access to information and assistance with **Care-giver Support** resources



UNITED WAY BRINGS TOGETHER UNIQUE PARTNERSHIPS TO ADDRESS COMMUNITY ISSUES TOO BROAD IN SCOPE AND BEYOND THE RESOURCES OF ANY ONE ORGANIZATION

BORN LEARNING

Focus: A comprehensive approach that provides educational tools for parents/guardians to create early learning opportunities for children 0-5 years old to develop at age-appropriate levels leading to school readiness

Major Community Partners: Lutheran Social Services, National Center for Learning Excellence (Head Start), Pregnancy Support Connection, Prevention and Protection of Abused Children, United Way in Waukesha County

Features: Family visits providing information, tips and answers on child development; group presentations; multiple community organizations working together; research-based; dedicated website: BornLearning.org

Results: Increased awareness by community of development of children ages birth to 5 years old, application of knowledge gained by parents, age-appropriate skill development of children 0-5

Initial Implementation: 2007

CAREGIVER SUPPORT

Focus: A community-based effort that relies on existing resources to help caregivers of older adults attain information, connect to services, and find support

Major Community Partners: Aging and Disability Resource Center of Waukesha County (ADRC), Alzheimer's Association of Southeastern Wisconsin, Boys and Girls Clubs of Greater Milwaukee, Catholic Charities, Elmbrook Church, Humane Animal Welfare Society, Interfaith Senior Programs, Laureate Group, Lutheran Social Services, Mental Health Association, ProHealth Care Senior Health Center, Regency Senior Communities—Muskego, Southeastern Wisconsin Area Agency on Aging, United Way in Waukesha County

Features: Focus on adults who are the primary caregiver for an older adult, broad-based community involvement, group presentations, available network of resources, support groups for male caregivers, dedicated website: thecaregiverconnection.org

Results: Caregivers connect with resources to provide care for older adults

Initial Implementation: 2008

FINANCIAL STABILITY

Focus: A community-based effort that provides hard-working families struggling to meet basic needs with the knowledge, tools, and opportunities needed to grow income, build savings and gain assets over time leading to self-sufficiency

Major Community Partners: Associated Bank, AXA Advisors (AXA Equitable—Retirement Benefits Group), Cooperating Congregations of Waukesha County, Employment Readiness Systems, Halquist Stone, Hebron House of Hospitality, HUSCO, La Casa de Esperanza, Landmark Credit Union, Mental Health Association in Waukesha County, M&I Bank, Nissen & Associates Staffing Continuum, QuadGraphics, United Way in Waukesha County, United Way Volunteer Center in Waukesha County, University of Wisconsin-Waukesha, U.S. Bank, Waukesha County Technical College, Waukesha State Bank

Features: Focus on families between 150-200% above the federal government poverty guideline; community effort involving non-profits, businesses, and colleges; classroom training and workshops by diverse business sectors in financial skills and knowledge; hands-on learning through job shadowing; requires employer involvement and feedback

Results: Hard-working families, struggling to meet basic needs, are able to increase their income, build savings, and gain assets

Initial Implementation: 2008



HELPING KIDS SUCCEED

Focus: A comprehensive, community-based approach by schools, parents, and agencies that provides tools for parents/guardians to help increase their involvement with their middle- and high school-aged children leading to success in school and the community

Major Community Partners: Boys & Girls Clubs of Greater Milwaukee, Hamilton School District, Mukwonago School District, Oconomowoc School District, Sussex-area Outreach Services, United Way in Waukesha County, Waukesha County Department of Health & Human Services, Waukesha School District, Wisconsin Community Services

Features: Focus on parents/guardians; multi-faceted approach; educational workshops for parents; individual tardiness/truancy reduction plans agreed to by the parent, school and child; non-school family activities; partnership with United Way, school districts, parents, and agencies

Results: Improved communication between parent and child, better understanding of the school's expectations, increased engagement between parents and children in various activities

Initial Implementation: 2005

TRANSPORTATION ACCESS

Focus: A comprehensive, community effort that provides essential transportation services to help meet the medical, safety and employment needs of individuals and families who have no other means of transportation

Major Community Partners: Badger Bus, Best Cab, Catholic Charities, Cooperating Congregations of Waukesha County, Hebron House of Hospitality, Hispanic Resource Center, Interfaith Senior Programs, La Casa de Esperanza, Metro Transit, United Way in Waukesha County, Waukesha County Development Block Grant

Features: Cooperative effort among for-profits, non-profits and government; clients are prescreened to determine eligibility; no cash is given out; clients receive bus passes or agency-arranged rides; focuses on low-income individuals and families with no resources, i.e. money, family, friends

Results: Low-income individuals and families have access to essential transportation to receive immediate care services

Initial Implementation: 2001



UNITED WAY PARTNER AGENCIES PROVIDE ESSENTIAL SERVICES THAT MEET THE IMMEDIATE OR SHORT-TERM NEEDS OF INDIVIDUALS AND FAMILIES

United Way in Waukesha County awards program funding in the areas of increasing self-sufficiency, meeting basic needs, and strengthening families. Volunteers and staff annually conduct program performance reviews and financial reviews to identify the direct impact of the essential services among those served throughout Waukesha County.

2008-09 PARTNER AGENCIES

Adaptive Community Approach Program, Inc. (ACAP)

American Red Cross in Southeastern Wisconsin

Association for the Rights of Citizens with handicaps (ARCh)

Big Brothers Big Sisters of Metropolitan Milwaukee & Waukesha County, Inc.

Boy Scouts of America, Potawatomi Area Council

Catholic Charities of the Archdiocese of Milwaukee, Inc.

Community Outreach Health Clinic

Curative Care Network

Donna Lexa Community Art Center, Inc.

Easter Seals Kindcare Southeastern Wisconsin

Energy Services, Inc.

Family Service of Waukesha County

Girl Scouts of Wisconsin Southeast (GSWISE)

Healthy Families of Waukesha County

Hebron House of Hospitality, Inc.

Interfaith Senior Programs, Inc.

La Casa de Esperanza, Inc.

Literacy Council of Greater Waukesha, Inc.

Lutheran Social Services

Mental Health Association in Waukesha County, Inc.

National Alliance on Mental Illness of Waukesha County (NAMI)

Pregnancy Support Connection, Inc.

Prevention and Protection of Abused Children, Inc. (PPAC)

Richard's Place, Inc.

St. Aemilian – Lakeside, Inc. (Spring City Corner Clubhouse)

St. Joseph's Medical and Dental Clinic

Salvation Army-Waukesha

Stillwaters Center, Inc.

The Caring Place

The Women's Center, Inc.

Waukesha Family YMCA

Waukesha Training Center

Wisconsin Community Services, Inc. (WCS)

YMCA at Pabst Farms



VOLUNTEERS ENGAGED IN OUR COMMUNITY

UNITED WAY VOLUNTEER CENTER HELPS TO MOBILIZE & EQUIP VOLUNTEERS

The United Way Volunteer Center in Waukesha County connects people with volunteer opportunities to serve their community, supports non-profit organizations to use volunteers effectively, develops volunteer leaders, and advocates for volunteerism resulting in an increased number of volunteers mobilized in the community. View local volunteer opportunities and sign-up at VolunteerWaukesha.com.

In 2008-09, the Volunteer Center helped organize group activities through (1) registering and mobilizing community members interested in volunteering during the June flooding, (2) coordinating Day of Action volunteers in a community-wide book drive, (3) organizing more than 150 Make a Difference Day community volunteers and employees from ProHealth Care in arts, literacy, beautification projects and other activities with children and seniors, (4) building capacity of area non-profit organizations through training non-profit leadership on proven strategies of successful volunteer engagement programs, and (5) continuing to engage business leaders in building a stronger community by mobilizing employee volunteers through the Waukesha County Corporate Volunteer Council.

SECOND ANNUAL LEGAL-COMMUNITY DAY OF CARING

The second annual Legal-Community Day of Caring was held in June 2008 as an activity to support United Way's Helping Kids Succeed Initiative. The free event, in conjunction with a summer camp for at-risk children sponsored by the Boys & Girls Clubs of Greater Milwaukee, provided parents/guardians an opportunity to increase their involvement with their children in family-related activities in a carnival atmosphere held at Hadfield Elementary School in Waukesha.

Participants/Sponsors

Arenz, Molter, Macy & Riffle, S.C.
Davis & Kuelthau, S.C.
Gatzke & Ruppelt, S.C.
Hippenmeyer, Reilly, Moodie & Blum, S.C.
Kelin R. Olson Law Office
McCoy & Hofbauer, S.C.
Michael, Best & Friedrich, LLP
Murn & Martin, S.C.
Nada K. Sizemore & Associates
Schott, Bublitz & Engel, S.C.
The Schroeder Group, S.C., Attorneys at Law
Waukesha County Circuit Court Judges
Waukesha County District Attorney's Office

INSPIRE BY EXAMPLE AWARD WINNERS

In April 2008, the United Way Volunteer Center celebrated the spirit of volunteerism through its annual Volunteer Celebration & Recognition Event. We congratulate the following 2008 "Inspire by Example" award winners for their significant volunteer achievements: Tom Constable as Community Leader of the Year, Gert Wilkinson as Volunteer of the Year, Katie Kuemmel as Youth Volunteer of the Year, ARCh Youth Team as Volunteer Group of the Year, and Shorewest Realtors as Business Partner of the Year.



FINANCIALS

United Way in Waukesha County works to maximize its impact in the community by utilizing its resources efficiently and effectively. A volunteer-led Operations Committee is responsible to ensure the highest levels of transparency and accountability. On May 21, 2009, Vrakas/Blum, Certified Public Accountants and Business Advisors, issued a clean audit opinion to the United Way Board of Directors.

STATEMENTS OF FINANCIAL POSITION

	3/31/09	3/31/08
ASSETS		
Cash and Cash Equivalents	1,787,393	1,692,784
Certificates of Deposit	1,100,000	1,100,000
Organization Endowment Investment	90,936	110,994
Prepaid Expenses	40,371	29,550
Accounts Receivable	22,596	2,574
Interest Receivable	21,614	39,755
Restricted Certificate of Deposit	8,000	7,000
Pledges Receivable	3,401,450	3,224,258
Less: Allowance for Uncollectible Pledges	(562,990)	(391,389)
Net Pledges Receivable	<u>2,838,460</u>	<u>2,832,869</u>
Total Property and Equipment	766,353	747,312
Less: Accumulated Depreciation	(383,660)	(347,177)
Net Property and Equipment	<u>382,693</u>	<u>400,135</u>
TOTAL ASSETS	<u><u>6,292,063</u></u>	<u><u>6,215,661</u></u>
LIABILITIES & NET ASSETS		
LIABILITIES		
Accounts Payable	149,162	171,986
Allocations Payable	3,176,128	2,974,226
Designations Payable	123,931	53,450
Community Impact Grants Payable	43,321	162,098
Safe and Stable Families Grants Payable	109,490	67,305
Deferred Program Revenues	27,760	42,125
TOTAL LIABILITIES	<u>3,629,792</u>	<u>3,471,190</u>
NET ASSETS		
Unrestricted Undesignated	2,224,432	2,164,682
Unrestricted Designated	362,941	512,961
Temporarily Restricted	74,898	66,828
TOTAL NET ASSETS	<u><u>2,662,271</u></u>	<u><u>2,744,471</u></u>
TOTAL LIABILITIES AND NET ASSETS	<u><u>6,292,063</u></u>	<u><u>6,215,661</u></u>

STATEMENTS OF ACTIVITIES

	3/31/09	3/31/08
UNRESTRICTED NET ASSETS		
SUPPORT AND REVENUE		
Campaign funds raised	4,483,686	4,650,231
The Windhover Foundation challenge funds raised	428,340	-
*Funds received from United Way of Greater Milwaukee, Inc.	1,201,611	1,157,883
Funds received from other United Ways	286,809	175,455
Service fees income	10,910	9,930
Volunteer Center dues and other revenues	53,701	13,448
Bequest/planned giving income	15,755	6,859
Donated services	12,046	17,779
Less provision for uncollectible pledges	(398,344)	(225,091)
Less amounts designated by donors for specific organizations	(1,058,637)	(916,418)
	<u>5,035,877</u>	<u>4,890,076</u>
Interest income	58,067	94,512
Investment losses on organization endowment investment	(35,813)	(7,765)
Other income	4,799	8,992
Volunteer Center gift to United Way for strategic alliance costs	-	19,587
Excess reserve on prior campaigns	2,497	35,524
	<u>5,065,427</u>	<u>5,040,926</u>
NET ASSETS RELEASED FROM RESTRICTIONS		
Satisfaction of program restrictions	123,016	161,319
	<u>5,188,443</u>	<u>5,202,245</u>
TOTAL SUPPORT AND REVENUE		
EXPENSES		
ALLOCATIONS		
Funds allocated to agencies	4,351,265	3,975,393
Less allocations funded through donor designations	(469,324)	(261,271)
Net allocations to agencies	3,881,941	3,714,122
Community Impact expenses	129,962	216,130
Total allocations	4,011,903	3,930,252
Program services	405,917	384,016
Total allocations and program services	4,417,820	4,314,268
Supporting services	691,322	644,811
United Way of America dues	46,555	43,070
Restricted funds utilized		
Loaned executives	24,097	29,701
Sponsorship expenses	16,958	29,820
Safe and stable families expense	81,961	101,798
Total restricted funds utilized	123,016	161,319
	<u>5,278,713</u>	<u>5,163,468</u>
TOTAL EXPENSES		
Change in unrestricted net assets	(90,270)	38,777
TEMPORARILY RESTRICTED NET ASSETS		
Safe and stable families support	82,125	101,875
Sponsorship contributions	48,961	50,659
Volunteer Center gift to United Way	-	48,091
Net assets released from restrictions	(123,016)	(161,319)
Change in temporarily restricted net assets	8,070	39,306
	<u>(82,200)</u>	<u>78,083</u>
CHANGE IN NET ASSETS		
NET ASSETS		
Beginning of year	2,744,471	2,666,388
End of year	<u>2,662,271</u>	<u>2,744,471</u>

OVERHEAD AND ADMINISTRATIVE COSTS

The overhead ratio calculated by United Way is equal to administrative and fundraising expenses divided by total unrestricted revenue as reported on the Federal Form 990 and the audited financial statements.

This calculation equals 13.97%, for 2008-09, which compares favorably to the accepted amount of 35% or less determined by the Better Business Bureau Wise Giving Alliance Standards for Charity Accountability.

*United Way of Greater Milwaukee returned \$1,201,611 to United Way in Waukesha County in partial compensation for donors' live/work patterns between the two counties and revenues raised in Waukesha County.

Management has prepared the financial information derived from audited financial statements. Complete and audited financial statements are available upon request.

UNITED WAY'S 2008 ANNUAL CAMPAIGN

Each year companies and organizations throughout Waukesha County host workplace giving campaigns to make it easy for their employees to make a difference in the lives of so many members of our community who they may never meet or know. Thanks to the generous spirit within the Waukesha County community, the 2008 United Way in Waukesha County annual campaign totaled more than \$4.8 million.

In January, United Way projected a revenue shortfall. The Windhover Foundation responded and issued a fundraising challenge to the community. Due to the leadership of The Windhover Foundation and several community organizations, United Way was able to preserve the agency programs' funding levels allocated in 2008. Individuals, corporations, and organizations responded to the challenge to fill the gap between revenue and funding levels, to include First Bank Financial Centre, First Business Bank, Fraternal Order of the Eagles, International Union of Painters and Allied Trades AFL-CIO Local 781, James Imaging Systems, M&I Foundation, Marine Bank, ProHealth Care, R&R Insurance Services, Rogers Memorial Hospital, The Past Presidents Club, Sunset Bank, UPS, and WE Energies. Twenty-three organizations throughout Waukesha County participated in special event fundraising activities in response to the challenge, which included a countywide 'Casual Day for United Way on St. Patty's Day' as proclaimed by County Executive Dan Vrakas.

The results of individual and corporate giving allowed the United Way Board of Directors to invest more than \$4.4 million into our community to impact education, income, and health by funding community-wide initiatives and essential services provided by our partner agencies. Funding investments will help children and youth achieve their potential through early learning, school readiness, and parental engagement; families become financially stable and independent by maximizing income, growing assets, and developing a dependable workforce; and improve people's health and quality of life through basic health care and mental health services, caregiver support, and transportation services.

The United Way in Waukesha County 2008 annual campaign was chaired by Ty Taylor, president, Waukesha State Bank, pictured at left. His leadership helped communicate how employees throughout the community could give through the convenience of payroll deduction or through one-time gifts, either directly, online, or through special events. He helped corporations see the value in investing in their community through a corporate contribution. And he connected with individuals throughout Waukesha County to financially support their local United Way to help measurably improve lives in our community.



RECOGNITION & APPRECIATION OF GROUPS



PACESETTERS

Organizations that ran early campaigns and “set the pace” for the annual campaign.

CMA/Flodyne/Hydradyne	R&R Insurance Services
Davis & Kuelthau, S.C.	Tailored Label Products
DUECO/UELC	UPS
FedEx SmartPost	Waukesha State Bank
MetalTek International, Wisconsin Centrifugal Division	

2008 LEADERBOARD—TOP CORPORATE & EMPLOYEE INVESTORS

\$600,000 and above

GE Healthcare

\$200,000 and above

AT&T
MetalTek International,
Wisconsin Centrifugal Division
ProHealth Care
The Windhover Foundation

\$100,000 and above

Cooper Power Systems
Dresser Waukesha
Generac Power Systems
HUSCO International
Quad/Graphics
UPS
We Energies

\$50,000 and above

Landmark Credit Union
R&R Insurance Services
US Cellular
Waukesha State Bank

\$25,000 and above

American TV Distribution Center
Aurora Health Care
Bruno Independent Living Aids
Century Fence Co.
DUECO/UELC
Kalmbach Publishing Company
Precision Gears
Seaquist Closures
Target Distribution Center
U.S. Bank
Waukesha County Government
Waukesha Foundry, Inc.
Waukesha School District

TOCQUEVILLE SOCIETY

The Tocqueville Society recognizes individuals who contribute \$10,000 or more. The name of the Society was chosen because of Alexis de Tocqueville's admiration for the American spirit of voluntary association and effort for the community good.

2008 Tocqueville Society Members

Terry & Nancy Anderson
Beverly Bruno
Veronica L. Floyd
Richard Hansen, M.D. & Barbara Hansen
Thora Hansen
J. Scott & Genevieve C. Harkness
Thomas L. Oberlin & Regina Baecher Oberlin
Gus & Becky Ramirez
Ford & Bobbe Titus
Waukesha County Community Foundation-
Jeffrey D. & Sara R. Ford Wiesner Fund
William A. Wright
One anonymous member

LOANED EXECUTIVES

Individuals who are either loaned from their employer or sponsored by area companies to help coordinate United Way campaigns across Waukesha County.

Tom Bergen	Amanda Perez
Angie Cooksy	Kate Pillman

LOANED EXECUTIVES SPONSORING COMPANIES

Dresser Waukesha	M&I Bank
Generac Power Systems	UPS
HUSCO International	Waukesha State Bank

EMPLOYEE CAMPAIGN COORDINATORS & COMMITTEE MEMBERS

More than 400 volunteers helped coordinate workplace campaigns throughout Waukesha County.

ORGANIZED LABOR PARTNERSHIP

The Waukesha County Labor Council and other members of labor continued their partnership with endorsements of the United Way Campaign.

EVENT SPONSORSHIPS

Annual Meeting/Community Leaders Breakfast
Marine Bank

Annual Volunteer Recognition & Celebration
Milwaukee Journal Sentinel
Assurant Health
Aurora Health Care
ProHealth Care

PLANNED GIVING—THE UNITED WAY

United Way in Waukesha County established an endowment fund at the Waukesha County Community Foundation in 2006. The Forever Fund is separate from the annual campaign and is meant to provide additional long-term support for our mission, “building a stronger community by uniting people and resources to measurably improve lives.” By integrating an endowment program into the fundraising efforts, United Way will be able to continue to improve lives and create lasting change in community conditions today and into the future. In June, 2008, the Jayne Thoma Forever Fund was established with \$15,755 in recognition of Jayne’s 20 years of service to United Way in Waukesha County and to provide permanent support to programs and initiatives in our community. The planned giving program is designed to meet the needs of donors and their families through a variety of bequest and trust options, which may be established as part of the Forever Fund or directly with United Way. Please remember United Way in Waukesha County in your will or estate plans.



2008-09 BOARD OF DIRECTORS



- Christopher Berens, Associated Bank
- Tracy Doyle, GE Healthcare
- Mark Fryer, Dresser Waukesha
- * Karin Gale, Schenck Business Solutions
- Mary Hubacher, Davis & Kuelthau, S.C.
- Annette Klare, Waukesha State Bank
- Randy Krocka, Waukesha County Labor Council
- Bruce Larson, AFL-CIO Labor Education and Training Center
- * Randy Lorenz (Treasurer), First Business Bank
- * Jay Magulski (Secretary), Landmark Credit Union
- * Paul Melnick (Vice President), Marine Bank

- Jason Mork, M&I Bank
- Joseph Niebler, Jr., Niebler & Roth LLP
- **Andi Oppmann, UPS
- * Mary Reinke, Aurora Health Care
- Amy Rislov, Aurora Health Care
- John Robertstad, Oconomowoc Memorial Hospital
- * Elaine Schmeda, Community Memorial Hospital
- * Stuart Schroeder, The Schroeder Group, S.C., Attorneys at Law
- * Janet Schulz (President), ProHealth Care
- Mark Sefcik, Enerpac
- Joan Shafer, We Energies
- **Ty Taylor, Waukesha State Bank
- Daniel Vrakas, Waukesha County Executive
- Deb Wallendal, Waukesha County Technical College
- Jeff Wiesner, Community Leader
- Lillie Wilson, NAACP
- Robert Young, Paradigm Sensor, LLC
- * Executive Committee member
- ** Ex Officio member

COMMITTEE VOLUNTEERS

Financial Review Committee

Committee members review agencies' audits, year-end financial reports and other budget materials to verify the fiscal stability of the organizations. Concerns identified by the committee are followed up with the agency. The committee provides a final report to investment area volunteers for consideration in funding decisions.

*Chris Berens
Michael Berry
Bob Borch
Erica Fischer
Damir Hadzalic*

*Sandra Roadt
Lindsay Rudkin
Sandra Strelka
Terry Sutter (chair)*

Impact Strategies & Results Committee

Committee volunteers make choices regarding where United Way dollars are spent in our community. These volunteers scrutinize agency budgets and programs, collectively donating more than 1,500 hours annually to ensure that donor dollars are making an impact in our community.

*Bill Downham
Annette Klare
Tamie Koop
Bruce Larson
Sally McCaughey
Paul Melnick (chair)*

*Joseph Niebler, Jr.
Chris Purdy
Joan Shafer
Daniel Vrakas
Jeff Wiesner
Robert Young*

Increasing Self-Sufficiency Committee

Committee volunteers review year-end reports and make funding recommendations for the programs/services that are part of the Increasing Self-Sufficiency impact area. Areas of interest for this committee: Caregiver Support initiative, 2-1-1, people with disabilities, seniors.

*Bob Borch
Bill Downham
Buck Houston
Annette Klare (chair)
Sally McCaughey*

*Virginia Moeller
Anne Schamberg
Donald Steinke
Deborah Treis*

Marketing Committee

Committee volunteers collect, analyze and use critical information about the market and target audiences to create broad awareness of United Way in Waukesha County through consistent year-round messaging, to develop new and enhance existing relationships with customers and other stakeholders, and to influence behavioral change of increased giving, volunteering and advocacy.

*Traci Catalano
Mike Flanigan
James Hart
Carol Heideman
Traci Huntemann-Piatt
Mike Krawczyk
Denise Dorn Lindberg
Denise Oehmcke*

*Andi Oppmann (chair)
Pat Ransom
Julie Rogers
Meghan Sprager
Chuck Stevens
DeAnn Umland
Daryl Zigan
Sarah Zubarik*

Web-based Communications Work Team under the Marketing Committee

*Mark Braeager
Traci Catalano
James Hart
Michelle Love-Johnson*

*David Mayer
Scott Offord
Chuck Stevens*

Meeting Basic Needs Committee

Committee volunteers review year-end reports and make funding recommendations for the programs/services that are part of the Meeting Basic Needs impact area. Areas of interest for this committee: Financial Stability and Transportation Access initiatives, employment, literacy, domestic violence, emergency shelter, disaster services.

*Mary Baer
Dave Helling
Linda Janecke
Glen Lewinski
Chris Prudy*

*Sandra Roadt
Herb Rosenberger
Joan Shafer (chair)
Rebecca Steffes
Michael Ward*

Operations Committee

Committee volunteers develop and maintain efficient and cost-effective systems, policies and processes that enable the delivery of United Way's mission-related work and ensure the highest levels of transparency and accountability.

*Chris Berens
Scot Ecker
Erica Fischer
Mark Fryer
Cyndie Loppnow*

*Randy Lorenz (chair)
Sally McCaughey
Jason Mork
Mark Sefcik
Terry Sutter*

Organizational Leadership & Governance Committee

Committee volunteers lead United Way to successfully fulfill its mission through sound governance, board and staff development, business planning and system citizenship.

*Mary Hannes
Amy Rislov
Elaine Schmeda (chair)*

*Jean Schultz
Janet Schulz
Deb Wallendal
Lillie Wilson*

Public Policy Committee

Committee volunteers meet on a quarterly basis reviewing potential issues that may impact United Way's initiatives and/or direct program investments. The committee keeps current with public policy issues and works on building relationships with public officials to advance common public policy agenda.

*Kate Bloomberg
Brian Dorow
Joanie Kerwin
Tamie Koop*

*Carol Lombardi
Anselmo Villareal
Robert Young (chair)*

Strengthening Families Committee

Committee volunteers review year-end reports and make funding recommendations for the programs/services that are part of the Strengthening Families impact area. Areas of interest for this committee: Born Learning and Helping Kids Succeed initiatives, counseling, youth development, child care, substance abuse, child abuse prevention, cancer support.

*J. Gail Adler
Regina Baecher
Oberlin
Kathie Ehlke
Mike Flanigan
Damir Hadzalic
Kim Hamilton
Emily Hepburn
Tamie Koop
Leila Leisch*

*Monica Marton
Carol Maurer
Florence Melster
Juan Morales
Jim Reinke
Kasha Riggsbee
Lenore Schell
Sandra Strelka
Jeff Wiesner (chair)*

Waukesha County Corporate Volunteerism Committee

Committee volunteers attend quarterly meetings as representatives of employee volunteerism at their business and participate in sponsored service projects. The committee is focused on engaging the business community in volunteering and educating businesses about the benefits of employee volunteer programs.

*Aurora Health Care
Cooper Power Systems
Fiserv
GE Healthcare
Gustave A. Larson
Company
MRA-The Management
Association*

*Manpower, Inc.
ProHealth Care
Sequist Closures
Sunset Bank &
Savings
Waukesha State Bank
We Energies*

United Way in Waukesha County benefited from more than 8,095 hours of time from 830 volunteers in program services and fundraising activities for an estimated \$157,938 value of time.



STAFF MEMBERS

Kristin Brandner
Director, Investor Relations

Courtney Capes
Manager, Investor Relations

Bonnie Dorniak
Office Manager

Michelle DuBord
Manager, Impact Strategies

Anne James
Administrative Assistant

Nichole Karrels
Senior Administrative Assistant

Jodi Kluge
Director, Volunteer Center

Cheri McCombs
Volunteer Center Specialist

Kate Pillman
Manager, Volunteer Engagement

John Schiraj
Director, Impact Strategies & Results

Bruce Schmidt
Manager, Investor Relations

Kurt Schmidt
AFL-CIO Community Services Liaison

Mike Schnell
Director, Operations

Jayne Thoma
Executive Director

Linda Wickstrom
Manager, Marketing & Communications

GIVE. ADVOCATE. VOLUNTEER.

NOTE OF APPRECIATION

An Annual Report is a reflection of the efforts of each and every individual, leadership and corporate contributor, volunteer Board of Directors member, volunteer committee member, agency partner, traditional and non-traditional partner, employee campaign coordinator, workplace giving volunteer, organized labor member, loaned executive, and staff member. To recognize the individual contributions of everyone would be impossible, yet each culminates into United Way in Waukesha County's ability to help people in Waukesha County by working in the areas of education, income, and health and to take on issues too big for any one organization to address alone. Because you give, advocate, and volunteer, United Way salutes your decision to LIVE UNITED.

1717 Paramount Drive
Waukesha, Wisconsin 53186
(262) 547-8459

UnitedWayWaukesha.org
VolunteerWaukesha.com

LIVE UNITED 

United Way
in Waukesha County