

United Way of Connecticut

Annual Report



2002



United Way Of Connecticut

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The Year in Perspective



Marty Milkovic, president/CEO
United Way of Connecticut

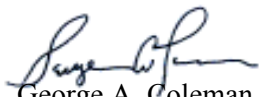
2002 was a year of challenge and opportunity for the United Way movement in Connecticut. United Way of Connecticut put in place changes that made it possible to continue to meet the needs of the people we help. We consolidated Children's Health Infoline and HUSKY Infoline into a single program based in our Rocky Hill office. The service continues to operate efficiently and effectively while serving increasing numbers of people.

The challenges of the economic downturn actually provided the opportunity to look at improving the way we do business in other areas. We have combined functions while maintaining our high standard of providing services. All of our call centers are receiving requests at rates about 20 percent higher than last year. We exceeded 600,000 total calls in calendar year 2002, reflecting the increase in human needs as the economy tightened. With a dedicated staff, we will continue to work to help at a time when so many people require our assistance.

This past year, United Way of Connecticut continued its services to families of the September 11th victims, as well as displaced workers and residents. Money was distributed to them from the September 11th Fund, as well as special funds set up by Stop & Shop, Brooks Pharmacy, the Connecticut Home Builders Association, the Connecticut Credit Union Charitable Foundation and several grassroots organizations.

The United Way movement in Connecticut remains strong and well positioned in every community. Many local United Ways expanded their work in Community Impact, responding to the new national focus on improving people's lives. Many local campaigns fared better than expected in the weakened economy. The largest two United Ways in Connecticut, United Way of the Capital Area in Hartford and United Way of Southeastern Connecticut in Gales Ferry, reported increases with each achieving its goal.

As we move forward into a new year we know that we will be there for our local communities and their neighbors in need. We will continue to build upon the 115-year tradition that is the United Way, and upon the 27-year commitment to quality services delivered by United Way of Connecticut's 2-1-1 Infoline.


George A. Coleman
Chairman of the Board


Marty Milkovic
President and CEO

Pictorial Highlights

“All Children Ready for School” panel during the 2002 United Way Leadership Summit. From left to right: Cary Dupont, president of United Way of West Central Connecticut; Dr. Janice Gruendel, co-president of Connecticut Voices for Children; and Dr. Mary Jo Kramer, superintendent of Darien schools.



From left: James Fleming, commissioner of Consumer Protection, retired State Police Lt. Col. Marjorie Kolpa, Warden Eileen Higgins, and Leo Canty, president of the CT Federation of Educational & Professional Employees. Fleming was chairman of the 2002 State Employees' Campaign.

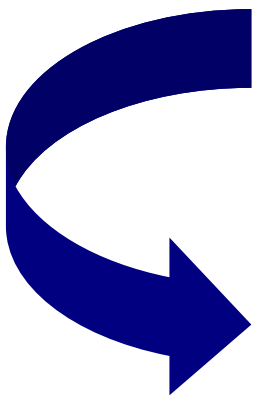


From left: Sherbie Worthen, UWC senior vice president; Ellen Scalettar, Senior Policy Fellow, CT Voices for Children; and Bob Kantor, director of the Fannie Mae Partnership, attend the 2002 United Way Leadership Summit.

Mission & Goals

United Way of Connecticut carries out the mission and tradition of United Way at the state level. It works as a support system for the 24 local United Ways across the state and oversees programs and initiatives best managed on a statewide basis.

**United Ways working together
to improve our communities.**



United Way of Connecticut's goals:

- Provide leadership on initiatives that Connecticut United Ways can best accomplish together.
- Promote partnerships and advocate with government to maximize the quality of human services in the state.
- Continue to provide 24-hour comprehensive information/referral/crisis intervention services using 2-1-1.
- Provide other direct membership services to United Ways of Connecticut.



United Way Services

As the state association for the 24 local United Ways, United Way of Connecticut (UWC) works to strengthen the statewide system by helping United Ways in their community building efforts, influencing public policy and measuring program impact.

Community Building

United Ways bring members of the community together to solve the problems of Connecticut residents. They assess needs and work collaboratively with nonprofit providers, funders, government, and neighborhood residents to improve community life.

Family Resource Centers – school-based, multi-service support centers – are a result of community building. Other ongoing efforts include Children First Initiatives, Kids Count, Success by Six, Healthy Valley 2000, and Individual Development Accounts (IDAs).

Government Relations

United Way of Connecticut works with coalitions to promote public policy that protects and helps children and families across the state. Critical areas in recent years have included school readiness, welfare reform and revitalizing neighborhoods.

UWC also works with state agencies, particularly the departments of social services, children and families, education, public health, mental health and addiction services.

Statewide Committees

Statewide committees are an effective way to collaborate and share information. These committees are comprised mainly of United Way staff, as well as volunteers and representatives from other organizations. United Way of Connecticut facilitates the following committees:

- ❑ **Chief Professional Officers' Council** – Acts on major issues affecting United Ways in the state.
- ❑ **Marketing and Communications** – Produces year-round marketing, creates cost-sharing opportunities for local United Ways and works to create cohesive messages across the state.
- ❑ **Resource Development** – Coordinates statewide corporate accounts and leadership giving; Provides a vehicle for joint projects and action.
- ❑ **Community Impact** – Promotes outcome measurement, community initiatives, and legislation affecting human services and the nonprofit sector.
- ❑ **Finance** – Reviews financial and operational issues concerning United Ways throughout the state.

□ Provided quarterly, regional training for United Ways and their funded programs/agencies in the Logic Model System of outcomes measurement. Conducted workshops for staff and volunteers about effectively integrating a focus on outcomes into their work, community-level outcomes and outcomes-focused planning.

□ Supported and provided leadership to Connecticut Voluntary Organizations Active in Disaster (VOAD), a group that promotes communication, cooperation and coordination among statewide organizations active in disaster planning and crisis response.

□ Brought together United Ways and independent volunteer centers in Connecticut to promote and develop a shared, statewide database of volunteer opportunities available online.

□ Hosted and organized the first Individual Development Accounts “Effective Practices Training” in October 2002, for teams from local United Ways, community-based organizations and banks across Connecticut. The two-day workshop was taught by staff from United Way of America and the Corporation for Enterprise Development. UWC also convened statewide IDA affinity group meetings and entered into a formal agreement to assist the state Department of Labor and its subcontractor, Career & Technical Education, in providing learning opportunities and other IDA Clearinghouse support services for Connecticut organizations.



□ Held the first *Leadership Summit: It's About Issues* attended by nearly 200 people. With the support of Connecticut Voices for Children, the summit focused on three key community issues: school readiness, affordable housing and family economic success. Each panel featured a legislator, an expert in the field and an advocate. The summit, moderated by United Way, helped position the organization as a community builder with an emphasis on impact.

Information and Referral Services



2-1-1 Infoline

Our core service, *2-1-1 Infoline*, is a free source for information, referral and crisis intervention, easily accessed from anywhere in Connecticut by dialing 2-1-1. Trained professionals help callers find information, discover options or deal with a crisis by locating hundreds of services in their community on issues including substance abuse, elder needs and suicide. *2-1-1 Infoline* operates 24 hours a day, is staffed by multilingual caseworkers and is TTY accessible. *2-1-1 Infoline* is a service of Connecticut United Ways in partnership with the State of Connecticut.

Specialized Services*

2-1-1 Child Care Infoline (Dial 2-1-1 or 1-800-505-1000)

Child Care counselors help families find quality care arrangements using a database of every licensed child care program in Connecticut. This service also provides information and business assistance to child care providers.

HUSKY Infoline (1-800-CT-HUSKY)

Informs families of Connecticut's HUSKY health insurance program for all children who are uninsured or may be eligible for Medicaid. It also assists families enrolled in Medicaid Managed Care to obtain necessary medical services to which their children are entitled.

Child Development Infoline (1-800-505-7000)

Serves as the access point for the Connecticut Birth to Three System, the Help Me Grow program and Preschool Special Education Services. Provides information about referrals to early intervention services, developmental concerns, addressing challenging behaviors, parent education/family support, preschool special education, disability or health related issues.

Maternal/Child Health Infoline (Dial 2-1-1)

Serves as the federally mandated toll-free access point for information and referrals to health services in Connecticut, particularly for low-income, uninsured pregnant women and children with special needs.

QuitLine (1-877-END-HABIT)

Free telephone service that offers resources for tobacco users, including information about tobacco use cessation, one-on-one telephone counseling, referrals to local cessation programs, and follow-up and support.

Care 4 Kids (1-888-214-KIDS)

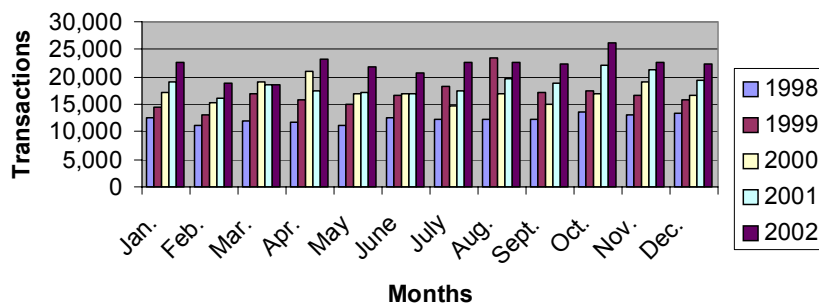
Provides information about Connecticut's Child Care Subsidy Program, including eligibility requirements and how to apply.

*In partnership with the State of Connecticut

Information and Referral Services

- Highlights

- ❑ The number of caseworkers recognized as certified information & referral specialists (CIRS) by the Alliance of Information & Referral Systems (AIRS) increased to 29.
- ❑ 2-1-1 calls increased by 20 percent since 2001, despite the absence of any major media campaigns.
- ❑ 2-1-1 caseworkers continued to assist the families of September 11th victims and displaced workers.
- ❑ At the request of the state Department of Social Services, 2-1-1 provided a customized service to DSS clients who left the assistance roles as part of the most recent welfare reform changes.
- ❑ Child Development Infoline expanded its focus to provide access to families of young children (age birth to 5) to resources that could help identify and address a child's behavioral or developmental needs. From January through December, there were 6,965 referrals to the Birth to Three System, 3,705 calls handled through Help Me Grow and 1,261 children followed in the Ages and Stages Child Monitoring Program.
- ❑ Maternal and Child Health Specialists developed an asthma resource manual that was disseminated to school nurse supervisors, medical advisors and superintendents. They also developed an asthma resource packet for licensed child care providers in Connecticut.
- ❑ During its first year of operation, QuitLine answered 1,337 calls, distributed more than 35,000 QuitLine brochures and 25,000 QuitLine tear-off "prescription pad" flyers.
- ❑ 2-1-1 has a new contract with the State Department of Children and Families to provide suicide prevention training statewide for foster parents, adoptive parents, DCF employees, independent living coordinators, and Kid Care coordinators. Another new contract through the Governor's Prevention Partnership will provide training to all school personnel statewide.



Information and Referral Services

- Highlights



- Child Care Infoline experienced an increase in call volume and Internet hits during the year.
- Child Care Infoline's outreach component was reduced and the remaining focus of regional outreach staff has shifted to consumer education for parents and professionals and recruitment of early care professionals.
- Because of larger than anticipated call volume, Care 4 Kids expanded its call center to include six additional employees to handle the overflow of calls.

HUSKY/CHIL Merge

HUSKY Health Infoline and Children's Health Infoline, formerly two specialized units that helped families in the HUSKY program, merged in August 2002 into one program now called HUSKY Infoline. The merge resulted in the elimination of three part-time and three full-time employees. Remaining employees from each program are now housed together at UWC in Rocky Hill. All staff handles calls for both functions.

Operating at reduced staff levels, HUSKY Infoline is experiencing its highest call volumes ever. For 2002, HUSKY Infoline handled 43,107 incoming and 25,420 outgoing calls. To date, the call volume continues to show an increase each month compared to 2001. The majority of calls to HUSKY Infoline continue to be for information and referral on the HUSKY program. For more complex issues, HUSKY staff also provides advocacy for families experiencing difficulty with the application and renewal process or in obtaining health care services.

Other Programs

CT Parents Plus

CT Parents Plus is Connecticut's federally funded Parent Information and Resource Center. In partnership with the U.S. Department of Education, the state Department of Education, and Connecticut Parents as Teachers, CT Parents Plus works to increase the ability of schools and parents to work effectively as partners to support learning both at home and at school.

Healthy Child Care Connecticut

Healthy Child Care Connecticut is a collaborative effort of the Department of Social Services through the Connecticut Head Start State Collaboration Office, the Connecticut Children's Health Council, and the United Way of Connecticut. The project brings together on its Core Committee and various subcommittees more than 50 representatives of organizations that play a key role in the planning and delivery of child care and health care for children and families.

Healthy Child Care Connecticut was involved in a number of projects in 2002, including:

- Developing a database of Child Care Health Consultants for networking and support.
- Developing a curriculum and training system for Child Care Health Consultants, their directors and their counterparts in other disciplines.
- Linking early care and education providers with resources to support the social and emotional development and mental health of young children and their families.
- Creating the single early care and education health assessment form endorsed by state agencies for recording and reporting information on young children's health.

State Employees' Campaign

The Connecticut State Employees' Campaign for Charitable Giving is the once a year opportunity for Connecticut state employees to contribute to nonprofit charities at the workplace. The operation of the CSEC is overseen by a group of state employees who are appointed to serve on the State Employees' Campaign Committee.

The 2002 campaign, chaired by Jim Fleming, commissioner of Consumer Protection, raised over \$1.7 million. The instability of the state budget in recent months has not stopped state workers from giving generously toward an ambitious campaign goal of \$1.8 million, which is \$300,000 higher than last year's set goal.

Financial Statement

UNITED WAY OF CONNECTICUT, INC.
STATEMENT OF FINANCIAL POSITION
 June 30, 2002

	2002
Assets:	
Cash and cash equivalents	\$ 1,778,441
Investments	0
Prepaid expenses	500
Grants receivable	645,479
Contracts receivable	90,949
Local United Way receivables	60,298
Other receivables	98,365
Office furniture and equipment (net of accumulated depreciation \$1,316,087 and \$987,877)	573,519
Total Assets	\$ 3,247,551
 Liabilities and net assets:	
Accounts payable and accrued expenses	\$ 855,194
Line of credit	0
Refundable advances	439,688
Deferred revenue	477,969
Security deposit liability	146,918
Total Liabilities	1,919,769
 Net assets:	
Unrestricted	1,327,782
Temporarily restricted	0
Permanently restricted	0
Total Net Assets	1,327,782
Total Liabilities and Net Assets	\$ 3,247,551

Financial Statement

UNITED WAY OF CONNECTICUT, INC.
STATEMENT OF ACTIVITIES
June 30, 2002

	2002
Changes in unrestricted net assets:	
Revenues, gains, and other support:	
Grants & contracts, federal & state	\$ 11,434,596
Grants & contracts, other	1,655,530
Local United Way revenue	735,159
Directory sales	11,866
Database income	4,320
Miscellaneous	81,081
Investment income	12,510
	<u>13,935,062</u>
Net assets released from restrictions:	
Satisfaction of program restrictions:	<u>0</u>
Total unrestricted revenues, gains and other support	<u>\$ 13,935,062</u>
Expenses and losses:	
Program services:	
Statewide information and referral services	8,423,394
Worksteps and Basic needs programs	2,991,197
United Way services	803,783
State employees' campaign	188,767
Total program expenses	<u>12,407,141</u>
Management and general:	
Statewide information and referral services	1,054,168
Worksteps and Basic needs programs	87,040
United Way services	116,862
State employees' campaign	28,113
Total management and general expense	<u>1,286,183</u>
Total expenses before depreciation expenses	<u>13,693,324</u>
Increase/(decrease) in unrestricted net assets before depreciation expense	241,738
Depreciation expense	<u>328,210</u>
Increase/(decrease) in unrestricted net assets after depreciation expense	(86,472)
Change in temporarily restricted net assets:	0
Change in permanently restricted net assets:	<u>0</u>
Increase/(decrease) in net assets	(86,472)
Net assets at beginning of year	<u>1,414,254</u>
Net assets at end of year	<u>\$ 1,327,782</u>



Board of Directors

Ted Aub

A&A Auto Parts
Represents United Way of Branford

Carol Blauvelt

Community Volunteer
Represents United Way of New Canaan

Nancy Budds

Community Volunteer
Represents United Way of Southeastern Connecticut

Kay Campbell

Community Volunteer
At-Large

Hart D. Caparulo

United Way of Greater New Haven
Represents United Way of Greater New Haven

George A. Coleman, Chairman

State Department of Education
Represents United Way of Northern Fairfield County

Robert Dolian

Cummings & Lockwood
Represents United Way of Stamford

Cary Dupont

United Way of West Central Connecticut
Represents CPO Council

Anthony Edwards

Peter Paul Hershey
Represents United Way of Naugatuck & Beacon Falls

William Egan, III

United Way of Northwest Connecticut
Represents United Way of Northwest Connecticut

Karl Epple

Chair Emeritus

Annie S. Finnie, Esq.

Rubenstein & Finnie
At-Large

Shelley Geballe

Connecticut Voices for Children
At-Large

Obie Harrington-Howes

Community Volunteer
Represents Darien United Way & Community Council

Gary Johnson

United Way of Milford
Represents United Way of Milford

Mary Jo Kramer, Ph.D.

Superintendent of Darien Public Schools
At-Large

John E. Mattingly, Jr.

Community Volunteer
At-Large

Carlos Mello

Olson Mobeck Investment Advisors
At-Large

Robert Metzler, Esq.

Tyler, Cooper & Alcorn
Represents United Way of the Capital Area

Marty Milkovic

United Way of Connecticut
President & CEO

Judy Moeckel

Department of Social Services
At-Large

Gretchen O'Shea-Reynolds

New Milford Hospital
Represents Housatonic-Shepaug United Way

The Rev. David C. Parachini

Grace Episcopal Church of Windsor
At-Large

Marc Pelletier

Community Volunteer
Represents United Way of Southington

Michael S. Rivers

Tracy Driscoll Insurance
Represents United Way of West Central Connecticut

Nancy Roberts

Connecticut Council for Philanthropy
At-Large

John J. Shaw, DMD

Capitol Region Metropolitan Medical Response System
At-Large

Kathryn Talbot

Department of Social Services
At-Large

Bunny Thompson

Community Volunteer
Represents United Way of Westport-Weston

Virginia Valkenburgh

Cannondale Associates
Represents United Way of Norwalk & Wilton

Ron Villani

General Electric
Represents Valley United Way

Eric Wexler

Mid-State Medical Center
Represents United Way of Central Naugatuck Valley

Kevin Wilhelm

Middlesex United Way
Represents CPO Council & Middlesex United Way

Local United Ways



Valley United Way

John J. (Jack) Walsh, executive director

United Way of Branford

Barbara Melendez, executive director

United Way of Eastern Fairfield County

Merle Berke-Schlessel, Esq., president/CPO

United Way of West Central Connecticut

Cary Dupont, president/CPO

United Way of Northern Fairfield County

June Renzulli, president/CPO

Darien United Way and Community Council

Katherine Karpen, CPO

United Way of Southeastern Connecticut

Janet Dinkel Pearce, president/CPO

United Way of Greenwich

Stuart D. Adelberg, president/CPO

United Way of the Capital Area

George Bahamonde, president/CPO

United Way of Meriden & Wallingford

Joseph Baker, executive director

Middlesex United Way

Kevin Wilhelm, executive director

United Way of Milford

Gary M. Johnson, executive director

United Way of Naugatuck & Beacon Falls

Lisa A. Shappy, CPO

United Way of New Britain & Berlin*

George Bahamonde, president/CPO

United Way of New Canaan

Brooke Manning-Hinds, president/CEO

United Way of Greater New Haven

Hart D. Caparulo, president/CPO

Housatonic-Shepaug United Way

Joseph Speranzo, executive director

United Way of Norwalk & Wilton

David R. Kennedy, president/CEO

United Way of Southington

Richard M. Corcoran, executive director

United Way of Stamford

Ellen Isidro, president/CPO

United Way of Northwest Connecticut, Inc.

William A. Egan III, executive director

United Way of the Central Naugatuck Valley

Kristen M. Bulkovitch-Perrotti, president/CPO

United Way of Westport-Weston

Bernice D. Corday, executive director

Windham Region United Way*

George Bahamonde, president/CPO

United Way of Connecticut

Marty Milkovic, president/CEO

*Affiliated with United Way of the Capital Area

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Senior Vice President, Information, Referral & Crisis Services, Melanie Loewenstein
Senior Vice President, United Way Services and Government Relations, Sherbie Worthen
Vice President, Casework Services and Training, Mary Drexler
Vice President, Information Services and Initiatives, Mary Hogan
Vice President, Maternal and Child Health, Dawn Grodzki
Vice President, Child Care Services, Sherri Sutera*

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Kathleen Fish,
regional director*

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Simone Gauthier,
regional director*

