



United Way of Charles County

## 2009 ANNUAL REPORT

### Vision Statement

**United Way of Charles County is a community impact organization that invests in strategies for community improvement.**

### Mission Statement

**To provide all citizens of Charles County the means to invest in their community to bring about positive changes in peoples' lives.**

*The following document is a report to the Board of Directors, the donors and the community about the activities of the United Way of Charles County for the 2009 calendar year. Our hope is that this information will provide you with knowledge of our organization and the role we have in our community.*

## UNITED WAY OF CHARLES COUNTY

On June 3, 1983, the United Way of Charles County was officially incorporated in the State of Maryland as a non-profit corporation.

From our location at 10250 La Plata Road in La Plata we operate an organization that is involved in many facets of health and human service to the people of Charles County. By serving as the landlord to other non-profit organizations, we are partnering with them to help them use more of their donations for programs instead of overhead costs. We offer them not only office space but also the ability to hold meetings and other events at the house at no cost to them.

The staff of the United Way of Charles County is actively involved in organizations in this community that are working on community issues such as shelter and hunger, mental health, information and referral, volunteer activities, children and youth, etc. This involvement keeps the staff and the Board apprised of the issues facing Charles County.

We've grown dramatically from being just a fundraising operation to being an integral part of our community and its services. Our Board has adopted the philosophy of the United Way Worldwide, which is to have an impact on our community.

Beginning with the 2005 Campaign, our United Way took the position of accepting donations and allowing designations only to our United Way, our Partner Agencies, our women's initiative – *Charles County Women – United in Giving*, Community Health Charities, or another United Way's general fund. By doing this we are eliminating the numerous donations that have gone to any number of organizations outside of our county and state. If we are to have an impact on problems in our own community, we must keep the money in our community. Since the 2007 Campaign we've been using undesignated donations to fund Community Impact Grants.

## **BOARD OF DIRECTORS**

Officers for 2009 were elected at the November 20, 2008 Board Meeting. Those elected to serve were:

Earle Knapp – Chairperson  
Mark MacFarland – Chairperson-elect  
Val Stone – Secretary  
Terrie Horstkamp – Treasurer  
Larry Wright serves on the Executive Committee as  
Immediate Past-Chairperson

Committees were chaired by:

Mark MacFarland – Admission Committee  
Terrie Horstkamp – Finance Committee  
Judy Schroeder – Personnel Committee  
Michael Gahan – Public Relations Committee  
Larry Wright – Board Development Committee  
John Buchanan – Bylaws Committee  
Chris Mais – Community Impact Grants Review Committee

Other members of the Board of Directors for 2009 were:

Jay Bala	Georgia Bennett	Marian Bruemmer
Stacey Cook	Leah Estevez	Mark Gandee
John Harris, Jr.	Kelley Jennings	Danny Mayer
Doug Meeker	Robert Parks	Jim Ross
Steve Salvas	Sonja Scharles	Steve Seely
Kendall Sorenson-Clark		Karen Winters
Ken Wise	Heather Hill (Agency Liaison)	

## **INTERNAL OPERATIONS**

### **Advisory Council**

The Partner Agencies' Advisory Council met quarterly and shared reports from their agencies as well as reports from the United Way. Special guest speakers were also present at some of the meetings. Heather Hill of Spring Dell Center served as the Advisory Council Chairperson for 2009. At the October meeting of the Advisory Council, Siobhan Ponder of Southern Maryland Child Care Resource Center was elected to serve as the Chairperson for 2010.

### **United Way House**

The United Way House continues to be a tremendous asset to our organization and the community. The house is completely filled with sublessees. They are: Habitat for Humanity in Charles County, Christmas in April-Charles County, Charles County Cooperative Ministry on Aging, Senator Thomas "Mac" Middleton, Charles County Arts Alliance, Charles County

Literacy Council, and Conservancy for Charles County. The meeting room is used frequently by not only the sublessees but by many community non-profit groups. Offering the meeting space to the community free of charge not only allows them to meet without expense, but also provides the visibility to United Way that we would not otherwise have with some of these citizens.

### **Strategic Plan**

We did not complete our normal review of the Strategic Plan this year. Instead we have contracted with a Transformation Consultant who will guide us through the process of deciding if we want to become a true Community Impact United Way or continue to do business as we have been.

**Mission:** *To provide all citizens of Charles County the means to invest in their community to bring about positive changes in peoples' lives.*

**Vision:** *United Way of Charles County is a community impact organization that invests in strategies for community improvement.*

- **Goal 1:** Take a leadership role in identifying and meeting critical community needs.
- **Goal 2:** Continually increase resources in order to meet critical community needs.
- **Goal 3:** Increase community awareness of the role of United Way of Charles County.
- **Goal 4:** Build the capacity and increase the effectiveness of the United Way of Charles County Board.

### **Annual Audit**

The United Way of Charles County continues to have an annual audit performed by an independent accounting firm. For the third year the audit was performed by Askey, Askey & Associates, CPA, LLC. Once again we have received an excellent report as we have for the 26 years we have been in operation.

## **COMMUNITY INVOLVEMENT**

### **Charles County Directory of Human Services**

Chief Operating Officer, Ginger Burch, continues to take on the responsibility for publishing the annual Charles County Directory of Human Services. Each year more non-profit agencies are seeking admission to the booklet and are requesting copies to be used within their organizations. This year 2500 copies were distributed throughout the community. For the 2009 edition, we once again worked with the Charles County Public Schools to include information about Student Service Learning opportunities in the county. Because of its proven value and popularity in the community we once again received a grant from the County Commissioners for \$5,500. That amount will be used to publish the 2010 edition of the booklet.

### **Committees, Coalitions, and Task Forces**

Both Ms. Burch and Ms. Harper continue to serve on committees and task forces in the county. Ms. Burch is serving on the Mental Health Advisory Board. In May, she participated as the

United Way liaison with the National Association of Letter Carriers for their annual food drive benefiting local food banks. She also participates in the Community Council that is sponsored by Constellation Energy at Calvert Cliffs Nuclear Power Plant. Ms. Harper and Ms. Burch both participate in Partnerships for a Healthier Charles County. Ms. Harper continues to serve on the 2-1-1 Maryland Task Force which has been successful in bringing 2-1-1 into Charles County this year. Ms. Harper continues to chair the Charles County Homeless and Emergency Shelter Committee (CCHESC) that is working on issues of the homeless and affordable housing. CCHESC is also the committee responsible for allocating the local Emergency Food and Shelter Funds that are awarded to Charles County through FEMA. She also serves on the County Commissioners' Grants Advisory Panel to make non-profit grant awards recommendations to the Commissioners

### **Charles County Non-profit Coalition**

In November 2006, the United Way joined with other non-profit organizations to form the Charles County Non-Profit Coalition. The purpose of the Coalition is to keep the needs and services of the non-profits in the minds of the County Commissioners. The Commissioners agreed to meet quarterly with the Coalition to discuss issues and work on solutions. The Coalition has begun to collect data from non-profits regarding the types of services and assistance requested by the citizens of Charles County on a daily basis. Ms. Harper co-chairs the Charles County Non-Profit Coalition.

### **COMMUNITY IMPACT**

#### **United Way Day of Action**

On June 21, 2009 our United Way participated in a Day of Action along with United Ways across the country. Our project was to travel from Safeway to Safeway throughout Charles County in our Care-A-Van to collect food for the food bank, distribute *familywize* discount prescription drug cards, collect cell phones for recycling, distribute information about volunteer opportunities and enlighten the public about the many services of the United Way of Charles County. We collected over 900 pounds of food and met many people who were introduced to our United Way by the many board member volunteers who participated.

#### **Day of Caring**

The fifteenth annual Day of Caring<sup>sm</sup> was held on September 10, 2009. Seventeen companies, organizations, or individuals, totaling over 125 volunteers, gave their time to 12 agencies for a day of much needed volunteer assistance during the one day project. This year the day started with a continental breakfast and kickoff at the Greater Waldorf Jaycees Community Center. The breakfast was sponsored and donated by the Greater Waldorf Jaycees Foundation. This project is another good example of the partnership we have with local businesses and organizations.

#### **Community Impact Funding**

Community Impact Grants will be offered to Partner Agencies once again this year. The Board authorized \$115,000 be set aside to award grants to Partner Agencies that meet all of the established criteria. The Community Impact Grants Review Committee will review the grant requests and make recommendations to the Board of Directors for disbursement of the funds.

During the 2008 Campaign the Partner Agencies had the opportunity to apply for funds to be used to fund a project related to one of three Critical Need Areas. These areas were consistent with the three areas of importance selected by United Way of America; Education, Income and Health. The grants were awarded to Catherine Foundation Pregnancy Care Center (\$4,676), Catholic Charities Angel's Watch Shelter (\$5,000), Center for Children (\$15,000), Charles County Literacy Council (\$1,000), Health Partners (\$11,232), Maryland Foundation for Quality Healthcare (\$700), Southern Maryland Child Care Resource Center (\$10,000), Southern Maryland Tri-County Community Action Committee (\$20,000), and Tri-County Youth Services Bureau (\$10,000).

Because of the economic situation, the Board of Directors also awarded Emergency Fund Grants to those agencies helping Charles County citizens with food, rent/mortgage assistance, and utility bills. Funds were granted to the following agencies to help with immediate needs: Catholic Charities Southern Maryland Food Bank (\$10,000), Catholic Charities Charles County Family Center (\$3,750), Charles County Children's Aid (\$4,000), Charles County Freedom Landing (\$2,000), Health Partners (\$900), and Southern Maryland Tri-County Community Action Committee (\$5,500).

### *familywize*<sup>®</sup> Prescription Medication Plan

In May 2008 United Way of Charles County joined with the Familywize Community Partnership to provide prescription drug discount cards to Charles County residents who have no prescription insurance or whose prescriptions are not covered under their plan. Since May of 2008, United Way staff and Board Members blanketed the area with discount cards. They were placed in pharmacies, doctors' offices, Charles County Department of Health, the Department of Social Services, places of worship, and public and private schools. Since the beginning of the program, thousands of prescriptions have been filled saving the customers over \$336,560 in prescription costs.

### **FUND RAISING ACTIVITIES**

The 2008 Campaign brought in over \$664,218 in pledges. With the addition of \$51,473 in special event net earnings, the campaign brought in over \$715,691. Eighty-seven percent of the pledges came through payroll deduction gifts, twelve percent came through corporate gifts, and the remaining one percent came from residential and miscellaneous donations. **An administrative and fundraising fee is deducted from the gross donation that was pledged to each designated Partner Agency and outside agency. Beginning with the 2004 Campaign, we have been deducting 10% from the pledged amount as our processing fee. This fee provides the funds necessary to track the pledges and designations, and to prepare and mail the checks to each agency quarterly. Our actual Administrative and Fundraising costs are determined by using the *Management and general figure (line 14) and the Fundraising figure (line 15) from the immediately preceding fiscal year's IRS Form 990. Since the 2004 Campaign we have been monitoring closely the pledges and payments that come through other United Ways so that the donors are only being charged one time for administrative and fundraising expenses.*** Approximately 61 percent of the money pledged in 2008 was designated by the donor to go to specific organizations or initiatives; Partner Agencies, Community Health Charities, *Charles County Women – United in Giving*, or other United Ways.

The balance of the pledges and the money raised through special events will be used for Community Impact Grants to the specific Partner Agencies, or used for operating expenses.

### **Pacesetter Campaign**

The 2009 Pacesetter Campaign was run for the fifteenth consecutive year. The following donors pledged their support of \$2,500 or more either as a corporate gift or gift-in-kind, prior to the kickoff of the 2009 Campaign:

American Community Properties Trust  
Charles County Government  
Charles County Public Schools Central Office Staff  
Civista Medical Center  
PNC Bank  
Rottman Creative Group, LLC  
Self Storage Plus  
The Wills Group

### **Annual Golf Tournament**

Our twelfth annual golf tournament was held at Swan Point Yacht & Country Club on April 22, 2009. We once again held two tournaments back to back so that more golfers were able to participate. Players were treated to a great day of golf. We wrapped up each tournament with either lunch or dinner, team prizes for every team, and an auction. The United Way netted \$43,677 from the tournament.

### ***Charles County Women – United in Giving***

Our initiative called *Charles County Women – United in Giving* continued to pursue leadership gifts from women to help women. Board member, Marian Bruemmer has been the Chairperson for the initiative. The first year's project brought in donations of \$8,985. The second year's campaign brought in \$12,994 and the third year's donations were \$10,146. The donations from the 2007 campaign totaled over \$18,000 and the 2008 campaign donations totaled \$17,739. The women who contribute meet each year to decide on the projects they will fund. Through the years, the grants have gone to Center for Children, Charles County Department of Health, Health Partners, Greater Baden Medical Services, Center for Abused Persons, Maryland Foundation for Quality Healthcare, F.B. Gwynn Educational Center, and Civista Hospital to provide for such things as cervical cancer screenings to uninsured and underinsured women between the ages of 18 and 40; ultrasounds for women with high-risk pregnancies; education and prevention for other diseases affecting women; dental sealants for children; Pack n Play cribs for infants to have a safe sleeping environment; and special art supplies for developmentally disabled children.. The initiative has gradually become a popular designation for donors who give through payroll deduction campaigns.

### **INFORMATION AND PUBLICITY**

The United Way of Charles County continues to place emphasis on advertising as a means to let the community know that our local United Way needs their support no matter where they work. Ms. Harper appeared several times on Comcast's Local Edition talking about the United Way and our special events. Advertisements were purchased in the Maryland Independent. This year we

once again purchased advertising space in the Chamber of Commerce special publication “Images of Charles County.” Because we were able to list all of the Partner Agencies in the ad, we requested that the agencies each submit a small fee to cover half of the cost of the advertisement. “Images of Charles County” will not only be in the form of a magazine but will also be on a web site. Because we purchased an ad in the magazine our logo will appear on the web site and will allow the public to reach us through an online connection.

The Charles County Public Library offered us space in their display cases at the La Plata branch, the Waldorf branch, and the Bryans Road branch. Ms. Burch prepared a display that highlighted our United Way during the months of September, October, and November. Ms. Burch continues to monitor our website to make sure that the information displays is as up-to-date as possible for people who visit the site to learn about the United Way and our activities. And for the first time, we displayed United Way information at the Community Wall at the St. Charles Towne Center Mall. Our display was up through the month of September.

Although we remain a “small” United Way when compared to the many United Ways across our country, we are doing our best to have a definite *impact on our community* in as many ways as possible. We are continuing to reach out to new donors and to the community to not only bring in new funds, but to use those funds in the most productive way.

This report is presented to the Board of Directors of the United Way of Charles County at the Annual Meeting on November 19, 2009 by,

Dorothy L. Harper  
President & CEO

**The United Way of Charles County helped to support the following Partner Agencies during the 2009 Campaign that assist the citizens of our community.**

Accokeek Foundation  
Alice Ferguson Foundation/ Hard Bargain Farm  
Alternatives for Youth and Families  
The Arc of Southern Maryland  
Big Brothers Big Sisters of Southern Maryland  
National Capital Area Council Boy Scouts of America  
Catherine Foundation Pregnancy Care Center  
Catholic Charities of the Archdiocese of Washington  
Center for Abused Persons  
Center for Children  
Charles County Children's Aid Society  
Charles County Cooperative Ministry on Aging (Meals on Wheels)  
Charles County Freedom Landing  
Charles County HARC  
Charles County Literacy Council  
Christmas in April, Charles County  
The Compassionate Friends, Southern Maryland Chapter  
Girl Scout Council of the Nation's Capital  
Greater Baden Medical Services  
Habitat for Humanity in Charles County  
Health Partners  
Hospice of Charles County  
Humane Society of Charles County  
The Jude House  
Legal Aid Bureau  
Lions Camp Merrick  
Maryland Foundation for Quality Healthcare  
Senior Services of Charles County  
Share Food Network  
Southern Maryland Center for Independent Living  
Southern Maryland Child Care Resource Center  
Southern Maryland Tri-County Community Action Committee  
Special Olympics Maryland, Charles County  
Spring Dell Center  
Tri-County Youth Services Bureau

## 2009 Annual Report – Attachment A

The United Way of Charles County meets monthly, on the third Thursday of each month, at 8:00 a.m. at the United Way of Charles County office located at 10250 La Plata Road, La Plata, Maryland. The Annual Meetings, which happen in November, are also held at the United Way House and the public is invited to attend.

Board members are elected to serve a three-year term. According to our bylaws, a board member may serve two consecutive three-year terms and then must be off of the board for at least a year before applying for another term.

Officers are elected each November to serve a one-year term beginning in January. They may be re-elected to the same office the following year, if they so choose.

### Meeting Dates for 2009:

January 8	Executive Committee	UWCC Office
January 15	Board of Directors	UWCC Office
February 5	Executive Committee	UWCC Office
February 19	Board of Directors	UWCC Office
March 5	Executive Committee	UWCC Office
March 19	Board of Directors	UWCC Office
April 2	Executive Committee	UWCC Office
April 16	Board of Directors	UWCC Office
May 7	Executive Committee	UWCC Office
May 21	Board of Directors	UWCC Office
June 4	Executive Committee	UWCC Office
June 18	Board of Directors	UWCC Office
July 9	Executive Committee	UWCC Office
July 16	Board of Directors	UWCC Office
August 13	Executive Committee	UWCC Office
August 20	Board of Directors	UWCC Office
September 3	Executive Committee	UWCC Office
September 17	Board of Directors	UWCC Office
October 15	Board of Directors	UWCC Office
November 5	Executive Committee	UWCC Office
November 19	<b>Annual Meeting</b>	UWCC Office
November 19	Board of Directors	UWCC Office