

Annual Report

2008



Dear Friends,

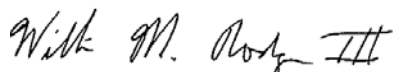
On behalf of our staff, volunteers, and board members, we are proud to present the 2007-2008 Somerset County United Way Annual Report.

As we conclude 2008, all eyes are on the economy and what the recession means for our nation, New Jersey, Somerset County, our neighbors and family. At Somerset County United Way, we, too, are deeply concerned about the economy's impact on our ability to not only meet the surge in needs, but also our ability to continue to implement Community Impact, initiatives that address the root causes of income instability, lack of access to education, and barriers to good health. However, we had a great 2007-2008 and believe that we are positioned as best as one can be to achieve these goals.

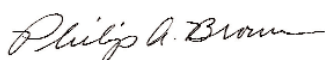
In the coming year, we will kick off the Somerset County Circles Initiative, focusing on assisting families working toward self-sufficiency. We will begin year two of the CASH Program, putting money back into working people's pockets and back into the local economy through preparation of tax returns and promotion of the earned income tax credit. These are two components of our exciting and timely agenda.

We would not have been able to achieve these positive outcomes without your contributions of time, talent and treasure over the past year, and we thank you. The next year will present challenges that have not been seen in over a generation. With your continued support, whether you donate or volunteer, on your own or through your workplace, your involvement will have a profound impact on our ability to achieve our mission and vision. Every minute, every smile, and every penny will make a difference.

Thank you, for being a part of the Somerset County United Way family.



William M. Rodgers III, Ph.D.
Chair, Board of Trustees



Philip A. Brown III
President and CEO

GIVE. ADVOCATE. VOLUNTEER.

Inside:

- 2008 Financial Data
- United Way Programs Review
- Tocqueville and Leadership Giving Rosters
- Volunteering Matters!
- Corporate Partners
- Board Member Roster



SCUW Financial Data 2008*

Public Support and Other Revenues

Fundraising results	\$ 8,446,843
Gifts in kind	377,361
Interest	76,310
Other, net	169,061
Total public support and other revenues:	9,069,575

Investment in Charitable Programs

Distributions to health and human service organizations not affiliated with SCUW	4,722,710
Resource Investment (investments in programs at health and human service organizations affiliated with SCUW)	2,000,000
Gifts in Kind and other grants	484,593
Program related expenses	747,113
Total Investment in Charitable Programs	7,954,416

Supporting Services expenses

Administration expense	303,103
Fund raising expense	514,966
Total Supporting Services Expenses**	818,069

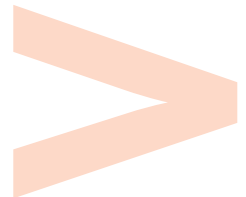
Payments to United Way of America for supportive services 84,470

Change in net assets 212,620

Total Charitable Investment and Supporting Expenses \$ 9,069,575

* **Somerset County United Way's Form 990 and complete audited financial statement are available at www.scuw.org. Additional SCUW financial information is available by contacting Bonnie O'Neill, Vice President of Finance and Administration, directly at 908-253-6504 or email bonnie.oneill@scuw.org**

** Total administrative cost of SCUW operations is 9.94% as audited for the 2007-2008 fiscal year.



Somerset County United Way Resource Investment

Somerset County United Way's resource investment process utilized community volunteers to invest \$2,000,000 in local services in six impact areas. The work of the funded programs helps to achieve the desired outcomes in each of the six areas and makes measurable differences in the lives of people in this community.

NURTURING OUR YOUNG CHILDREN

DESIRED OUTCOMES:

- Families have access to quality affordable child care so children are prepared to enter school at age 5
- Parents have access to parenting programs to become more effective parents and to become part of a larger community.
- Families have resources and supports that ensure healthy development of every child.

2007 Funding: \$253,400

STRENGTHENING FAMILIES

DESIRED OUTCOMES:

- Families have access to services and resources that enhance their growth, development and skills
- Families have their basic needs met (food, shelter, clothing and healthcare).
- Families feel connected to each other and to the larger community.

2007 Funding: \$73,400

PROMOTING PHYSICAL AND EMOTIONAL HEALTH AND WELLNESS

DESIRED OUTCOMES:

- People are informed as to where to access health and wellness services.
- People lead healthier lifestyles.
- People whose primary language is not English have access to health and wellness services.
- Medically indigent residents of Somerset County experience improved physical and mental health.
- Residents have access to the highest quality traditional and alternative health services.

2007 Funding: \$532,383



INCREASING SELF-SUFFICIENCY

DESIRED OUTCOMES:

- Adults and families in Somerset County are able to meet and maintain their basic needs on a long-term basis.
- Adults and families in Somerset County are able to manage a short-term crisis (physical, health, emotional, security, financial).
- Adults and families meet their basic needs.

2007 Funding: \$444,017

SUPPORTING OLDER PEOPLE AND PEOPLE WITH DISABILITIES

DESIRED OUTCOMES:

- Senior citizens and people with disabilities in Somerset County:
 - +lead active, healthy and independent lifestyles and are contributing members of the community.
 - +have their basic needs met.
- Vulnerable adults are identified and have their needs met.
- Caregivers have adequate information, resources and support to fulfill care-giving role

2007 Funding: \$343,400

INVESTING IN OUR YOUTH

DESIRED OUTCOMES:

- Somerset County youth have access to age-appropriate services that promote healthy development
- Somerset County youth are physically and emotionally healthy and educationally on track
- Somerset County youth are ready to move to successful adulthood
- All youth possess skills and resources to achieve and maintain a healthy lifestyle.

2007 Funding: \$353,400



2007-08 SCUW Program Results

2008 Creating Assets, Savings and Hope (CA\$H) Volunteer Income Tax

Assistance Program: In the inaugural year of the Volunteer Income Tax Assistance (VITA) program, 88 tax returns were completed impacting 146 individuals. The program provided costs savings of more than \$6,800 and a refund total of \$146,638. People claimed the Earned Income Tax Credit totaling \$44,345, most individuals were first time claimants. The result is that low wage-earning individuals and families in our community had more money returned to them through the VITA program.



2007 Gifts of the Season/Wrapped in Love:

The Somerset County United Way Gifts of the Season and Wrapped in Love programs ensured that more than 4,500 individuals and families received gifts and warm coats during the holiday season. Through the generosity of thousands of caring volunteers, 9,639 gifts and 4,000 coats were provided valued at \$177,783. This enabled program recipients to be able to afford other basic necessities such as food, clothing, rent and utilities.



2007 Stuff the Bus: In order to provide children from low-income families in our community with the necessary school supplies to begin the school year ready to learn, Somerset County United Way collected 41,000 school supply items, valued at more than \$65,000 through the generosity of participants from 80 companies and other organizations. More than 5,000 eligible children within 43 elementary and middle schools and eight non-profit organizations received needed school supplies from this program.

2008 Baby Bundles: To help struggling pregnant women and new parents give their babies a good start in life, the Somerset County United Way Baby Bundles provided 5,500

new baby care items to families with 600 babies in our community. The generosity of employees in 57 area companies and other organizations made it possible to provide \$38,500 worth of baby care items to the families in need.

2007 Week of Caring: In partnership with the United Way of Hunterdon County, Somerset County United Way provided 1,800 volunteers from area companies and community groups with meaningful volunteer projects within 35 non-profit organizations. The dollar value of the work completed by the volunteers was over \$130,000.

2007-08 Women's Initiative: Using over \$25,000 raised through the annual Women's Initiative breakfast, volunteers funded eight projects at local agencies that support the Women's Initiative theme of Women Building Community and Empowering Lives. Projects included: parenting training for homeless mothers; nutrition education for women in recovery from substance abuse; purchase of an EKG machine to serve medically underserved women; transportation for victims of domestic violence; mentoring and community service for at-risk adolescent girls; and child care subsidy for low-income working mothers.

2007-08 Partnering Education and Community Enrichment (P.E.A.C.E.) Grants:

Somerset County United Way was able to fund 27 different youth development projects in our community that promote life and workplace readiness, career exploration, character education, healthy living, tolerance and diversity and the development of youth leadership skills through community service. Thousands of children were positively impacted by projects such as financial education presentations, peer-led workshops that taught good citizenship and respect and character education through fun activities for children and parents.



2008 Party in the Park/Family Volunteer Day: In partnership with the Somerset County Park Commission, the Family Volunteer Day event was held in conjunction with the Party in the Park event. Hundreds of volunteers participated in assembling more than 500 personal care packages for people experiencing a crisis or who are homeless.

LIVE UNITED™

Tocqueville Society



The Tocqueville Society recognizes individuals who contribute \$10,000, \$100,000, \$1 million and beyond.

The name of the Society was chosen because of Alexis de Tocqueville's admiration for the American spirit of voluntary association and voluntary effort for the community good.

The following individuals are members of the Tocqueville Society.

Anonymous (3)
Barbara and John Bava
Mr. and Mrs. Christopher Bone
Dr. and Mrs. C. Caldwell
Greg and Jill Durant
Jeffrey and Cynthia Edwards
Keith Henry
Mr. John and Mrs. Barbara Lawlor
Doug and Robin Oas

Henry J. Ristuccia
Owen and Anna Ryan
Robert and Janice Salerno
Barry and Evelyn Salzberg
Gregg Seibert
Martin and Nancy Somelofske
Robert and Donna Walsh
Gregory G. Weaver
Joseph Williams

Leadership Giving

Over 350 donors made a huge difference in our community and gave at or above the Leadership level. Through the generosity of their financial contributions, they empower us to create lasting change and improve life for everyone who lives and works in Somerset County.

Leadership Giving recognition starts at \$1,500 for Somerset County United Way. Due to limited space in this report, please visit <http://www.scuw.org/GetInvolved/DonateMoney/LeadershipGiving.aspx> to see the names of all of our cherished Leadership Givers.

Please note, we are grateful for every supporter and regret any errors or omissions of our online list.

4,316 volunteers donated their time by working on employee giving campaigns, collecting items for various drives, completing Day of Caring projects, preparing taxes through the CASH Program, serving as members of the board and on various committees of the board. This volunteerism totaled **30,910 volunteer hours** that

helped make a difference throughout Somerset County.

2007-08 Corporate Partners

Somerset County United Way would like to thank the over 100 corporate and nonprofit partners that have contributed financially to the success of Somerset County United Way this year at the level of \$1,500 or above. A complete listing of these organizations can be found at <http://www.scuw.org/CampaignCorner/CorporateParticipants.aspx>



Somerset County United Way 2007- 2008 Board of Trustees

William Rodgers, PhD - (Board Chair) Professor of Public Policy, Edward J. Bloustein School of Planning and Public Policy
 Sandy Kiser - (Board Vice-Chair) Director Community & Public Affairs, Ethicon, Inc.
 Michael Fenster - (Board Treasurer) Community Volunteer
 Jody Levinson - (Board Secretary) Director, Career Services, Johnson & Johnson Health Care Systems
 Howard Katz, Esq. - (Board Legal Counsel) Attorney, Herold and Haines

Pat F. Balestrieri - Controller, Video Corporation of America
 Jerry Benn - Vice President, Human Resources, Brother International Corporation
 Courtney Billington - Vice President, North America GPSG
 Michael Breznak - Director, Commercial Contracting Policy, J&J Healthcare Systems, Inc.
 Shawn Clark - United Brotherhood of Carpenters Local #455
 Casey Crabill - President, Raritan Valley Community College
 Paul Grzella - Managing Editor, Courier News/Home News Tribune
 Steve Latus - Director, Internal Communications, Pfizer
 James R. Richart - Director of Finance, Arc of Somerset
 Christine Henderson Rose - Director, Somerset County Youth Services
 Joseph Scarbaci - President, Complete PErsonnel Service, Inc.
 Victor Sordillo - Global Technical Services Manager for Loss Control Services, Chubb Group of Insurance Companies
 Martin Torbert - Director Marketing & Public Relations, National Starch & Chemical Co.
 Louise Wilson - Community Volunteer
 Rick Zack - Senior Property Manager, Advance Realty Group

Thank you to all our volunteers who
LIVE UNITED™