

**BE THE REASON**  
**NOW MORE THAN EVER**



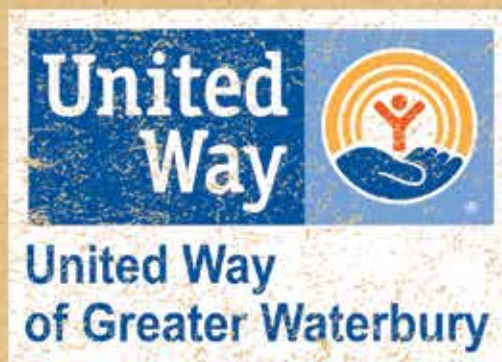


**WHEN WE ASKED THE COMMUNITY TO  
BE THE REASON,  
YOU ANSWERED.**

During these  
unprecedented times,  
it has been the  
volunteers of all ages,  
community partners,  
generous donors,  
local businesses  
and leaders who have  
made our work possible.

You are the reason  
we can impact so many.

SEE THE IMPACT AT  
**UNITEDWAYGW.ORG**



# WELCOME LETTER

**NANCY E. TRAVER & KRISTEN JACOBY**

**Dear Friends,**

It has been a humbling year at United Way of Greater Waterbury as we rose to the challenge of an evolving pandemic, while fulfilling the promise of our daily work in the areas of Education, Financial Stability and Basic Needs. We are humbled by the unwavering support of our donors and corporations, the commitment of time and expertise of our volunteers, the dedication of our community partners and the appreciation expressed by those our collective impact touches. This Annual Report is a testament to the vital work we accomplished in 2020-2021, and to those who made it possible.

There are almost 40 volunteers, most serving on the three impact councils, one for each of the impact areas in which United Way of Greater Waterbury works: Basic Needs, Education and Financial Stability. Then there is a cabinet that provides another perspective. As the impact councils focus on their areas, the Community Impact Cabinet takes that integrated approach and provides recommendations to the board. We keep saying that people don't only experience challenges in one impact area. So, we need both a detailed look and an integrated perspective.

None of that work would be possible without the generosity of people like you and your support of the Be the Reason campaign. Led by Campaign Chair John Hopkins, president of Post University, and Campaign Vice-Chair Karen Hinds, CEO of Workplace Success Group LLC, the campaign raised an amazing \$4,110,000.

We continue to move forward, advancing our strategic plan which was approved by the board in 2020. We're looking at how diversity, equity and inclusion fits into all of our community investments. In addition, we have sought to strengthen real community voice within our volunteer groups, with eight of the 11 new volunteers on our councils and Community Impact Cabinet identifying as people of color, which is bolstering confidence in our decisions.

In the coming months, we'll be offering volunteer training called Implicit Bias in Fundraising so that, as these important decisions are made, we're all aware of the preconceived notions we can bring to the table. We've heard more than a few volunteers express how excited they are.

But first, we pause and look back at the past year through this annual report, to celebrate the lives changed, and all of you who made those results possible.

Thank you to everyone who stepped up to Be the Reason help is there when it is needed most.

**Sincerely,**



**Nancy E. Traver**  
Chair, Board of Directors  
Business Development &  
Marketing Manager, Traver IDC



**Kristen Jacoby, MPH**  
President & Chief Professional Officer  
United Way of Greater Waterbury



## LET'S BE THE REASON

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# UNITED WAY OF GREATER WATERBURY'S 2020/2021 COMMUNITY INVESTMENTS



## EDUCATION

Increasing opportunities for children and youth to succeed.

### EARLY CARE AND EDUCATION

*Children birth-5 have expanded access to quality early educational experiences.*

#### PROGRAMS

- Catholic Charities – Infant Toddler Care, 2 Gen
- Cheshire YMCA – Child Care
- Reach Out and Read – Early Literacy
- Waterbury YMCA – Child Development

#### INITIATIVES

- Waterbury Bridge to Success Community Partnership – Collective Impact Cradle to Career Initiative
- Home Visiting: Literacy & Oral Language Development

### FAMILY ENGAGEMENT & POSITIVE YOUTH DEVELOPMENT

*Children and youth 5-18 have opportunities to experience success and achieve their potential.*

#### PROGRAMS

- Boy Scouts – Participation for Underprivileged Youth
- Boys & Girls Club – After School Program
- Cheshire YMCA – School Age Care
- Children's Community School – Personalized Education
- Girls Inc. – GirlStart
- Girl Scouts – Leadership Experience
- Nutmeg Big Brothers/Sisters – Mentoring
- Safe Haven – Community Education
- Waterbury YMCA – Camp, Hoops & Homework, School Age Care
- Waterbury Youth Services – Linking Academics to Life

#### INITIATIVES

- Waterbury Bridge to Success Community Partnership – Community Led Collaborative Action Network
- Cradle to Career Community Partnership
- Campership Program



## FINANCIAL STABILITY

Increasing financial stability through employment opportunities.

### TRAINING AND EDUCATION FOR UNDER-EMPLOYED & UNEMPLOYED YOUTH & ADULTS

*Expanded entry level employment opportunities that may lead to self-sufficiency.*

#### PROGRAMS

- Catholic Charities – Two Gen
- Hispanic Coalition – Hispanics in Healthcare Careers
- John J. Driscoll United Labor Agency – Building Pathways CT Apprenticeship Readiness Program
- Waterbury Youth Services – Support for Self-Determination

### TRAINING AND EDUCATION FOR EXPERIENCED WORKERS

*Expanded training and employment opportunities.*

#### PROGRAMS

- Northwest Regional Workforce Investment Board – Home Works Program

### INCOME SUPPORTS FOR WORKING HOUSE-HOLDS THAT FOSTER ECONOMIC SECURITY

*Access to programs and practices that increase household income including financial literacy.*

#### INITIATIVES

- CT Association for Human Services – Volunteer Income Tax Assistance (VITA)
- CT United Ways – ALICE Saves
- Local Initiatives Support Corporation – Financial Opportunity Centers at Naugatuck Valley Community College and New Opportunities, Inc.





## BASIC NEEDS

Helping people become more self-sufficient in meeting their basic needs.

### HOUSING

*Access to safe and affordable housing - temporary and permanent.*

#### PROGRAMS

- American Red Cross – Disaster Services
- CT Legal Services – Legal Aid
- Safe Haven – Domestic Violence Shelter
- Salvation Army – Family Shelter

#### INITIATIVES

- Homelessness Coordinated Access Network
- Flexible Assistance Fund
- EFSP – Emergency Food & Shelter Program

### FOOD

*Access to affordable, nutritious food.*

#### PROGRAMS

- American Red Cross – Disaster Services
- GWIM – Food Pantry, Soup Kitchen
- Hispanic Coalition – Senior Case Management
- Salvation Army – Comprehensive Emergency Assistance

#### INITIATIVES

- Food Resource Committee
- Stock the Pantry
- Holiday Assistance
- Healthy Foods
- EFSP – Emergency Food & Shelter Program

### HEALTH CARE

*Access to appropriate, affordable physical, dental & behavioral healthcare, including prevention & intervention services.*

#### PROGRAMS

- American Red Cross – Disaster Relief
- Catholic Charities – Behavioral Health
- CT Counseling Centers – Methadone Maintenance
- CT Legal Services – Legal Aid
- Hartford Health Care at Home – Home Health Care
- Hispanic Coalition – Senior Case Management
- Mental Health Connecticut – Independence Center
- Safe Haven – Non-Shelter Services
- Safe Haven – Sexual Assault Crisis Services
- StayWell Health Center – Dental, Women's Health
- Waterbury Youth Services – Youth/Family Emergency Services/Homeless Youth
- Wellmore – Adult Outpatient, Child Clinical, Emergency Mobile Psychiatric Services, Morris House, Therapeutic Shelter, Women/Children's Program

#### INITIATIVES

- Greater Waterbury Health Partnership

# BE THE REASON: EDUCATION

## EARLY CARE & POSITIVE YOUTH DEVELOPMENT

**United Way's education strategy provides opportunities so that children and youth can fulfill their potential. With increased exposure to educational experiences and out-of-school opportunities — including a deliberate and planned approach to increasing developmental assets — more kids are set up for success. To fulfill this strategy, we partner and invest in agencies with similar strategies and a proven record of attaining their goals.**



**LAGAR'E JANUARY MARTINEZ**

LaGar'e January Martinez describes the time he's spent at Waterbury Youth Services (WYS) as a long, positive journey. "They showed me opportunities that helped me develop into the person I am today. I could learn skills and listen to the perspectives and mindsets of a lot of people. They taught me to take a leadership role in my personal development."

Olivia Dudley, positive youth development leader, related LaGar'e's experience to the WYS mission, which is, "Guiding youth to discover their unique talents and potential for success-one life at a time."

"We wouldn't be able to meet our mission and have the programs we do without funding from United Way," Director of Program Operations Laura Cummings explained. "That is key and based on the fact that the goals for both organizations align very well. I can't imagine a better relationship."

As a freshman at Pace University, LaGar'e is taking courses in film and screen studies, a path that was inspired by his work as social media manager with WYS.

"We created the position because of LaGar'e's interest in photography," Laura said. "We pay attention to what interests the youth in our programs and then find relevant opportunities to build on that interest to achieve positive youth development. LaGar'e worked with our adult staff social media coordinator and it was wonderful to have him in that position."

Amanda Augeri, programs facilitator on the Youth Development Team, said, "The goal is to help youth find where they want to go. LaGar'e found his path and what he was meant to study."

She emphasized how much effort is put into listening. "We want to have different ways for youth to actively express themselves. Our Youth Empowerment Team is run by our youth and has a say in the programming and events that take place at WYS. When we say we try hard to listen to our youth, we mean it."

In his dorm room, LaGar'e proudly displays the piece he made in a woodworking program, where he crafted his name as a sixth grader. "I may have participated in every program at WYS."

He also studied journalism, "We reached out to the community and learned how to get deeper into topics, to find out what was true. We wrote articles and gave and received feedback, which made me see the full value of my work."

"Not only have there been opportunities for me to grow but to see others grow with me and to gain a sense of community. The WYS community is diverse and every walk of life goes through those doors. They all have different backgrounds and cultures. I made friends with people I would never have spoken to otherwise and took a piece of those friendships with me."

LaGar'e said his experiences at WYS taught him how to be open minded and to conduct himself professionally, skills that helped as he applied to college.



Amanda said, "It feels very nice to see the impact we have on youth, to remember the years we spent with LaGar'e and see him in his dorm room during a Zoom call now."

Olivia pointed out that program participants receive a stipend of \$65 per month, which helps develop good financial habits.

"I bought clothes, snacks and things I needed. It felt good because I didn't have to ask my mom but I had to be smart because it was only \$65."



**65**

**39** volunteers read to children at **65** opportunities, totaling **16** hours of interactive story time for students at Cheshire YMCA, Waterbury YMCA & TEAM.



**41**

**41** volunteers (adults & students) recorded themselves reading stories producing 3 hours, 50 minutes and 33 seconds of content.



# BE THE REASON: FINANCIAL STABILITY

## JOB TRAINING, EMPLOYMENT OPPORTUNITIES, & INCOME SUPPORTS

**United Way's investments in the impact area of Financial Stability aim to ensure that all Greater Waterbury residents have adequate economic self-sufficiency for themselves and their families.**



The Naugatuck Valley Community College (NVCC) Financial Opportunity Center (FOC), a partnership with United Way of Greater Waterbury and Local Initiatives Support Corporation (LISC), offers a comprehensive set of resources that helps people improve their lives. When they receive the three services provided at the FOC — employment training, financial coaching and access to benefits — in an integrated way, clients are 50 percent more likely to land a well-paying job than those receiving employment services alone. The chance of them staying in that job long-term doubles when financial coaching reinforces the work of employment counseling.

NVCC Director of Community and Economic Development Fay Godbolt explained, "Community colleges ensure that people who are going back to school or getting back on their feet have the opportunity to access non-credit and workforce development courses. Anyone can register for the FOC but many students find the program because they are receiving SNAP benefits. The Department of Social Services funds their studies."

The FOC opened in November 2020 at NVCC to offer the three-fold approach: employment training for those who need new skills, along with job placement support; financial education with one-on-one counseling; and access to income supports so that students such as veterans can find the right path to any benefits for

which they are eligible but may not be aware exist or are having difficulty in claiming. After the course ends, the FOC stays in touch with students for 30 to 90 days, providing both pre- and post-budget support and job follow-up.

An investment from United Way supports the financial coaching of FOC clients. Juan De La Rosa, the financial coach who was trained by LISC, works closely with the FOC SNAP Coordinator. "Jen, our local coordinator, does a great job of talking to people and learning about them to ask questions such as if they have a checking account and how they use their bank services. We can expand the coaching from there."

Questions are designed to help students identify and set their own goals, such as to save for a large expense such as a car or house. "We give feedback but we've learned from LISC how to respond without telling them any answers. There are no wrong responses and it is up to them to define their lives," Juan said.

The purpose of the program and his work as a financial coach is meant to be a force for good by providing the financial literacy education as well as the follow-up help people need to succeed.

That success is measured to demonstrate how the program benefits individuals.

SNAP recipients can schedule an information session and review all programs. "Most fill out an application and move forward," said Fay. "LISC is focused on bundling services; I call them wrap-around services because the resources cover every aspect of family life so no one falls through a gap. Resources that include job training or help with finances. One of the great things I see coming out of the program are people who didn't budget are now working on their household budgets."

Jim Horan, LISC Connecticut's executive director, said, "We know the FOC model of integrated services works to move clients toward financial stability. We are thrilled with how NVCC has embraced this model, and grateful to the United Way for its support to make this possible in Waterbury."



Juan agreed, "LISC and the students have trusted us with an opportunity and we want people to know that we're here to make something good happen. We're excited for the second year coming up."

The FOC served 127 people its first year. 88% identified as female, 52% African American and 31% Hispanic. The NVCC FOC is simultaneously narrowing racial wealth gaps in historically underinvested communities.

The FOC will expand to continue the work of moving people from where they struggle to make a living wage to where they can take care of their families and improve their standard of living.

Fay is grateful to LISC and United Way for making the coordination possible. "When we can bring resources

together, we get more traction and solutions are better." She added, "I've seen what's possible with this program and that's why I'm so excited. We're meeting people where they are and making sure we help bring them up."

NVCC CEO Lisa Dresdner, Ph.D., noted how the FOC is part of NVCC's consistent efforts to engage in the work that meets the needs of everyone in the communities served. She said, "We're grateful for our partnership with United Way of Greater Waterbury and LISC for the funding that allows us to make a tangible difference in peoples' lives. Fay has put together a great team, and with her leadership and the wholistic approach of the FOC, people will have more hope and clear pathways for a brighter future."



## 1,130

**1,130** tax returns processed through **VITA**



## Tax Season

*Keeping filers safe during COVID:*

**45%** accessed VITA virtually through the Get Your Refund Portal

**41%** used a drop off method

**14%** had their taxes prepared in person



## \$1,208,865

**\$1,208,865** in federal refunds received for low income and ALICE households



# BE THE REASON: BASIC NEEDS

## HEALTHCARE, HOUSING, & FOOD

**The United Way's basic needs strategy helps people become more self-sufficient. When our neighbors can access safe and affordable housing — temporary and permanent — as well as healthcare and affordable, nutritious food, then our community can move toward a stable, healthy future. Helping one individual or family to address multiple challenges helps us all.**



John had been doing well and was getting his life back on track after experiencing homelessness triggered by unemployment. But, shortly after moving into an apartment with his 16-year-old daughter and restarting a stable lifestyle, he lost his job again and fell behind in rent.

Sofia Swaby, housing program coordinator with Salvation Army Waterbury Corps, knows that, sometimes, the journey from survival mode to independence is not a linear path. She can only surmise that John was reluctant to share his downward change in circumstances when he chose to find shelter with the St. Vincent DePaul Mission of Waterbury instead of returning to the Salvation Army's shelter.

Many Greater Waterbury agencies collaborate with each other to improve services to the community. When Salvation Army discovered where he was staying, his former case manager offered to work with him again, assessing the situation and suggesting a referral to mental health services. Like the donors who support United Way's strategic approaches, partner agencies are the reason why solutions can work in spite of additional problems.

"John is now working full time again and saving money," Sofia emphasized that financial coaching is intended to build habits on which clients like John can rely to be successful on their own. "I had an in-depth conversation with John about budgeting and prioritizing. I need to see deposited checks on his bank statement. We offer many resources here but the actual work is up to the client."

She added, "His hard work is not just helping himself but providing for his family as his daughter is very successful in school."

The Salvation Army's family shelter is open 24/7 and offers breakfast, lunch and dinner. There are resources such as computer stations so that children can do their schoolwork or adults can look for jobs. There are also classes on resume writing and postings for job leads and apartment opportunities.

Those resources include a collaboration between Salvation Army Waterbury Corps and Northwest Regional Workforce Investment Board.

"We lost a lot of resources because of COVID-19 and now we're relearning what used to be our expertise. I just spent three weeks pulling together information for a new resource binder so clients know about daycare opportunities, SNAP and how to access services through 2-1-1." According to Sofia, and the staff are unsung heroes.

"There's not a day when we're not here, meeting the basic needs of our neighbors. We couldn't keep our doors open without United Way."

Donors are breaking cycles by helping kids to be fed and rested, able to stay awake in school and learn. Life's comebacks don't follow a movie storyline. Through proven strategies and support, United Way partners like the Salvation Army are delivering hope to people in spite of real-life setbacks.



"At the end of the day, the success stories outweigh the stressors. When a client gets 'back to normal' or comes into the shelter to say, 'Thanks to you, I'm reunited with my kids,' it's great to know you helped. Knowing that there

is one little thing we did to help an individual or another family become successful is why we do what we do."

Name withheld for confidentiality



**\$24,969**

Flexible Assistance Fund assisted **19** households, keeping **29** adults and **18** children from becoming homeless. With rental assistance totaling over **\$24,969**.



**12,500**

Stock the Pantry donations provided over **12,500** meals to the community.



**SingleCare**

UWGW partners with **SingleCare** (formerly FamilyWize) to provide community members with access to affordable prescription medications, ensuring greater health and financial stability through a **free** prescription savings card.



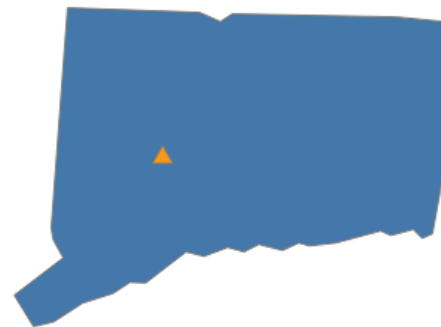
## Fiscal Year

July 2020 - June 2021

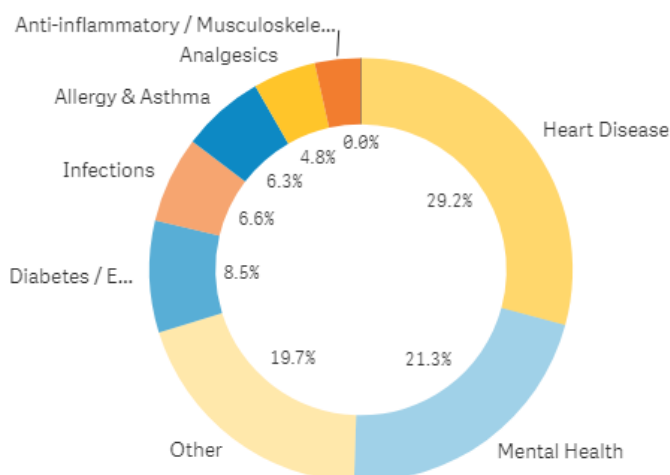
Proudly Partnered With



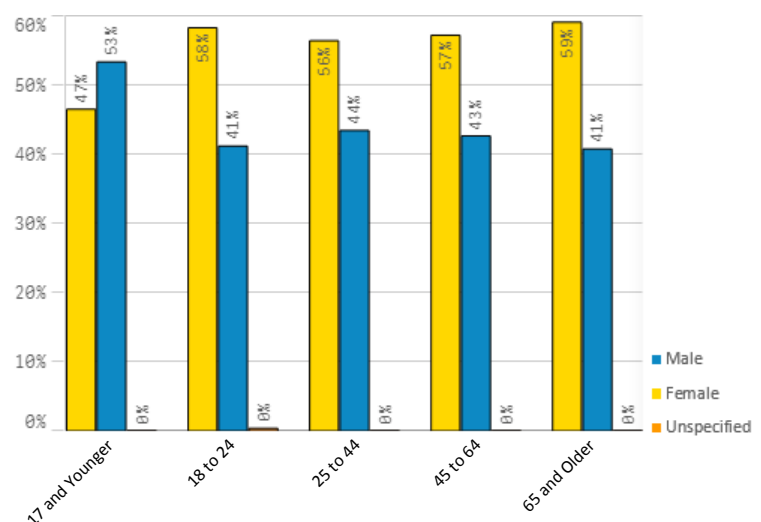
Total Rx Savings	Total People Helped
<b>Nationwide</b>	
<b>\$223,888,046</b>	<b>2,478,957</b>
<b>State (CT)</b>	
<b>\$3,851,427</b>	<b>35,111</b>
<b>United Way of Greater Waterbury</b>	
<b>\$352,703</b>	<b>3,239</b>



## Percentage by Therapy Class



## Percentage of People Helped by Age & Gender



## VOLUNTEER ENGAGEMENT

Volunteers of every age are making a difference, delivering over \$300,000 in impact to our ten-town community.



## EMERGING LEADERS

The United Way of Greater Waterbury Emerging Leaders is a network of young professionals who live and/or work in the Greater Waterbury area and share a passion to enrich their community. The group provides a platform to impact change and to grow personally and professionally.



### Activities included:

- Yoga/School Supplies Fundraiser for Waterbury Youth Services
- Distribution of Face Masks to Partner Agencies
- Walk A Mile In Someone Else's Shoes Virtual Walk
- Flanders Clean Up Day with UPSTARTERS
- Professional Development Workshop with John Brubaker
- Microaggressions Conversation with LeRon Barton
- Financial Stability Workshop
- Stock the Pantry Volunteering
- And more!





## UPSTARTERS

# UPSTARTERS®

UPSTARTERS is a youth volunteer engagement strategy that gives local youth exposure to the role they can play in addressing community needs. Rather than hoping that youth learn about volunteerism or philanthropy by the time they are adults, UPSTARTERS creates opportunities today. UPSTARTERS is focused on the future generation of United Way learning to lead now.

### Projects included:

- Children's Community School Clean Up Day
- Kennedy High School Tee Shirt & Mask Making Workshops
- Collection of Holiday Gift Cards for Waterbury Youth Services
- Community Card Making Project for Local Healthcare Workers
- Need To Read Community Project Online Reading Activities
- Positive Youth Development Leadership Summit Participation
- Stock the Pantry Volunteering
- And more!



## COPORATE VOLUNTEERISM

Corporate Volunteer Engagement provides local employees with the opportunity to engage directly with the community they support. They experience a deeper understanding of how United Way makes a difference by participating in a project or event that directly correlates with the work of United Way of Greater Waterbury, learning not only about the need but the strategies behind the solutions.

### Corporate volunteers participated in:

- Adopt a Family for the Holidays
- Volunteer Income Tax Assistance
- Diaper Drive
- Stock the Pantry
- Painting at Partner Agencies
- Walk a Mile in Someone Else's Shoes
- United Way Boards, Councils and Committees
- And more!

Watch our Stock the Pantry video to see Emerging Leaders, UPSTARTERS and Corporate Volunteers volunteering together for Day of Action to Stock the Pantry!

[www.unitedwaygw.org/gallery](http://www.unitedwaygw.org/gallery)



## GRANT SNAPSHOTS

### ELISHA LEAVENWORTH FOUNDATION

**\$25,000 for COVID-19 Food Insecurity, supporting United Way's partnership with the City of Waterbury 3-1-1, Police Activity League (PAL), LaBonne's and ShopRite of Waterbury**

This funding provided food and emergency supplies to households who were quarantined with COVID-19.

1,014 COVID positive households were assisted, representing 3,320 individuals and families receiving deliveries of 1,196 grocery orders and emergency supplies (cleaning supplies, medication, diapers and thermometers). Additional United Way COVID funds were used to support these services, totaling \$133,507. As of June 14, 2021, United Way has transitioned all operations of the program to the City of Waterbury.

### JEWISH FEDERATION OF WESTERN CONNECTICUT

**\$25,000 for COVID-19 response – Basic Needs Gift Cards**

At the onset of COVID-19, United Ways throughout Connecticut partnered for a state-wide COVID-19 response fund to deploy financial resources to individuals and families economically affected by the pandemic, including ALICE (Asset Limited, Income Constrained and Employed) households. Consumer purchase data shows 75% was used to meet those basic needs of food, utilities, household supplies and transportation.

In a continuing effort to support ALICE households, specifically targeted but not limited to: First Responders, Healthcare Personnel, Grocery Store Workers, Retail Workers, Public Transit and School Bus Drivers, Daycare Services and Childcare workers, an additional grant funded by the Jewish Federation of Western Connecticut was initiated.

Community organizations partnered with the United Way of Greater Waterbury and Jewish Federation of Western Connecticut to identify ALICE families and individuals in the named categories as recipient card holders. Partners included Bridge to Success Community Collaborative, Town of Cheshire Department of Human Services, Hispanic Coalition of Greater Waterbury and Neighborhood Housing Services of Waterbury. A total of 120, \$200 gift cards were allocated to eligible households.

### WELLS FARGO FOUNDATION

**\$15,000 – Community Care Fund/Volunteer Income Tax Assistance**

Funding from Wells Fargo Foundation, helped to leverage United Way of Greater Waterbury's Community Care Fund, which supports investments under the Financial Stability Impact Area and more specifically the Volunteer Income Tax Assistance (VITA) Program.

Volunteer Income Tax Assistance is an IRS sponsored program to provide free tax preparation services for households earning \$57,000 or less.

### THOMASTON SAVINGS BANK

**\$2,500 Technology Grant**

Improving United Way of Greater Waterbury's ability to continue to work as a community convener in a virtual world, this technology grant enhanced United Way's video conferencing capability in two conference rooms. United Way is now able to host meetings both virtually and in-person, bringing together local government, companies, volunteers and partner and community agencies to meet the Basic Needs, Education and Financial Stability of residents in our ten town region.

**Thank you to the following foundations and organizations for investing in United Way of Greater Waterbury's Community Impact initiatives.**

American Savings Foundation  
Bank of America Charitable Foundation  
Blue Back Health, LLC  
Drew Marine  
Elisha Leavenworth Foundation  
Eversource Energy Foundation  
Franklin P. and Arthur W. Perdue Foundation, Inc.  
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The Leever Foundation  
Liberty Bank Foundation  
Mazaika Family Foundation Inc.  
Molder Family Foundation  
People's United Community Foundation  
Post University  
Red Rhino Fund (Taft School)  
Saint Mary's Hospital  
The Robert F Quinn Foundation  
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Thomaston Savings Bank Foundation  
Trinity Health of New England  
Waterbury HEALTH/Waterbury Hospital  
Waterbury Regional Chamber  
Webster Bank  
Wells Fargo Foundation  
William Casper Graustein Memorial Fund



**United Way was founded by volunteers, and it is sustained by volunteers. As our most trusted resource, our volunteers are engaged in creating a shared vision and taking action to address the underlying causes of our region's most serious problems.**

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43 donors wish to remain anonymous

*\*Indicates donor is deceased*

## IN-KIND SUPPORT

**United Way of Greater Waterbury would like to extend a heartfelt thank you to the businesses and individuals that graciously provided in-kind support throughout the 2020-2021 campaign.**

Albert Bros., Inc.  
Mr. John Baker  
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Ms. Ann Marie Brites  
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Carmody Torrance Sandak & Hennessey LLP  
City of Waterbury  
Connecticut Foodshare  
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## 1942 SOCIETY: LEAVING A LEGACY FOR THE FUTURE

The United Way of Greater Waterbury has provided services to our community since 1942, making a positive difference in the lives of countless individuals. Over time, the needs and types of services have changed, but United Way of Greater Waterbury's commitment to investing in our community's future and enriching lives is constant.

The 1942 Society recognizes those individuals who have chosen to have a significant impact on the future of our community by arranging for a planned gift to United Way of Greater Waterbury.

*If you have included United Way of Greater Waterbury in your estate plans or will and your name is not included, please contact: Tomeka Cole, 203-757-9855 x17 or [tcole@unitedwaygw.org](mailto:tcole@unitedwaygw.org).*

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of William E. Fielding\*  
Jack and Sandy Senich  
Attorney David Sfara  
Mr. Roger Shinn\*  
Gene and Chris Shugrue  
Rebecca P. Williams

*One 1942 Society Member  
wishes to remain anonymous*

*\*Deceased*



# TOCQUEVILLE & LEAVENWORTH

## NUMBER OF TOCQUEVILLE BY COMPANY

Webster Bank .....	42
Element Solutions .....	4
Albert Bros., Inc. ....	3
Drew Marine .....	3
Post University .....	3
Generation Partners .....	2
AI-TEK Instruments, LLC .....	1
Bank of America .....	1
Carpin Manufacturing, Inc. ....	1
Drubner Hartley & Hellman, L.L.C. ....	1
EmCare .....	1
Health Complex Medical, Inc. ....	1
Hubbard-Hall Inc. ....	1
Ion Bank .....	1
Kroll Government Solutions .....	1
Litchfield Distillery .....	1
People's United Bank .....	1
The Lombard Group .....	1
Torrco .....	1
Traver IDC .....	1
United Way of Greater Waterbury .....	1
WORX .....	1

## NUMBER OF LEAVENWORTH BY COMPANY

Webster Bank .....	270
Element Solutions .....	37
Post University .....	15
WORX .....	10
Carmody Torrance Sandak & Hennessey LLP .....	9

Ion Bank .....	9
Torrco .....	8
Trinity Health Of New England .....	8
Hubbard-Hall Inc. ....	6
LANXESS Corporation .....	5
Savings Bank of Danbury .....	5
United Way of Greater Waterbury .....	5
Drew Marine .....	4
Health Complex Medical, Inc. ....	4
Marion Manufacturing Company .....	4
Thomaston Savings Bank .....	4
Waterbury Hospital .....	4
City of Waterbury .....	3
HOB Industries, Inc. ....	3
Largay Travel, Inc. ....	3
Noujaim Tool Co., Inc. ....	3
UniMetal Surface Finishing, LLC .....	3
Alliance Medical Group .....	2
Bank of America .....	2
Bentley Systems, Incorporated .....	2
Connecticut Legal Services, Inc. ....	2
Connecticut State Employee Campaign .....	2
Gem Manufacturing Company, Inc. ....	2
Jo-Vek Tool & Die Manufacturing Co .....	2
Liberty Bank .....	2
Republican-American .....	2
Somma Tool Company .....	2
The Platt Brothers & Company .....	2
Traver IDC .....	2





## 2020-2021 CAMPAIGN TOP 50 CORPORATE GIFTS

1. Webster Bank
2. Element Solutions
3. Drew Marine
4. Post University
5. Ion Bank
6. Eversource Energy
7. Hubbard-Hall Inc.
8. Torroco
9. Drubner Hartley Mengacci & Hellman, L.L.C.
10. LANXESS Corporation
11. Traver IDC
12. Waterbury HEALTH
13. The Platt Brothers & Company
14. Saint Mary's Hospital
15. AMETEK - Haydon Kerk Pittman
16. Illinois Tool Works, Inc.
17. United Parcel Service of America, Inc.
18. Albert Bros., Inc.
19. TD Bank
20. Liberty Bank
21. Gem Manufacturing Company, Inc.
22. Marion Manufacturing Company
23. People's United Bank
24. Bank of America
25. NEOPERL, Inc.
26. Cadi Company
27. HOB Industries, Inc.
28. Loehmann-Blasius Chevrolet, Inc.
29. Rotary Club of Waterbury, Inc.
30. Truelove & Maclean Inc.
31. American Electro Products, Inc.
32. CLA (CliftonLarsonAllen LLP)
33. Jaci Carroll Staffing
34. Utitec Inc.
35. Demsey Manufacturing
36. Costco Wholesale Corporation
37. L.F. Powers Company
38. Bushka Lumber & Millwork Co. LLC
39. Henry & Giardina LLP
40. SignPro
41. UniMetal Surface Finishing, LLC
42. Stop & Shop Supermarket Companies
43. Somma Tool Company
44. Waterbury CT Teachers Federal Credit Union
45. Eastern Connecticut Pathology Consultants, P.C.
46. Medtronic
47. Metallon, Inc.
48. Microtech, Inc.
49. The Hartford Financial Services Group Inc.
50. O'Connell & Goldberg
51. Waterbury Swiss Automatics, Inc.
52. Pitney Bowes
53. Landmark Printers
54. National Die Company, Inc.
55. Newtown Savings Bank
56. Waterbury Fire Fighters Association, Local 1339
57. Waterbury Police Union - Brass City Local
58. Comcast Corporation
59. AHEPA Order of Waterbury Chapter 48
60. Paniccia Construction Corp. LLC
61. The Taft School
62. Garmin International
63. The Travelers Insurance Companies, Inc.
64. EducationDynamics
65. Liberty Mutual Group, Inc.
66. Innaimo Chiropractic
67. KeyBank
68. AFSCME Local 2090
69. AFSCME Local 353
70. Turn To The Wonderful Fund
71. UnitedHealth Group

## 2020-2021 TOP 100 CAMPAIGN CONTRIBUTORS

1. Webster Bank
2. Element Solutions
3. Drew Marine
4. Post University
5. Ion Bank
6. Hubbard-Hall Inc.
7. Saint Mary's Hospital
8. Torroco
9. Eversource Energy
10. Albert Bros., Inc.
11. Waterbury HEALTH
12. LANXESS Corporation
13. Drubner Hartley Mengacci & Hellman, L.L.C.
14. Bank of America
15. Traver IDC
16. Health Complex Medical, Inc.
17. Thomaston Savings Bank
18. Waterbury Public Schools
19. United Parcel Service of America, Inc.
20. City of Waterbury
21. WORX
22. Carmody Torrance Sandak & Hennessey LLP
23. Carpin Manufacturing, Inc.
24. The Platt Brothers & Company
25. Litchfield Distillery
26. Illinois Tool Works, Inc.
27. AMETEK - Haydon Kerk Pittman
28. Wellmore Behavioral Health
29. United Way of Greater Waterbury
30. Liberty Bank
31. Savings Bank of Danbury
32. AI-TEK Instruments, LLC
33. The Lombard Group
34. People's United Bank
35. HOB Industries, Inc.
36. EmCare
37. Gem Manufacturing Company, Inc.
38. Republican-American
39. Connecticut State Employee Campaign
40. Noujaim Tool Co., Inc
41. Marion Manufacturing Company
42. UniMetal Surface Finishing, LLC
43. American Electro Products, Inc.
44. TD Bank
45. Somma Tool Company
46. NEOPERL, Inc.
47. BantamWesson
48. New Opportunities, Inc.
49. Salesforce
50. Jaci Carroll Staffing
51. Truelove & Maclean Inc.
52. Cheshire Public Schools
53. Safe Haven of Greater Waterbury Inc.
54. Waterbury Regional Chamber
55. Costco Wholesale Corporation
56. AT&T
57. Henry & Giardina LLP
58. Palace Theater
59. Microtech, Inc.
60. Seidel Inc.
61. Demsey Manufacturing
62. CLA (CliftonLarsonAllen LLP)
63. United Technologies Corporation
64. Stop & Shop Supermarket Companies
65. Utitec Inc.
66. Greater Waterbury YMCA
67. Waterbury Youth Services, Inc.
68. Bentley Systems, Incorporated
69. Shaker Automotive Group
70. Cadi Company
71. Loehmann-Blasius Chevrolet, Inc.
72. Rotary Club of Waterbury, Inc.
73. United Way of Massachusetts Bay and Merrimack Valley
74. The Harold Leever Regional Cancer Center
75. L.F. Powers Company
76. Sirius Computer
77. Westover School
78. Connecticut Legal Services, Inc.
79. Largay Travel, Inc.
80. Girls Incorporated of Western Connecticut
81. Mental Health Connecticut, Inc.
82. Town of Cheshire
83. Morgan Stanley
84. Northwestern Mutual Financial Network
85. Secor, Cassidy & McPartland, P.C.
86. Wolcott Public Schools
87. Waterbury CT Teachers Federal Credit Union
88. The Hartford Financial Services Group Inc.
89. Stevens Company, Inc.
90. Waterbury Swiss Automatics, Inc.
91. The Mattatuck Museum
92. IBM Corporation
93. Biondi and Rosengrant, LLC
94. Region 16 Beacon Falls & Prospect
95. Waterbury Bridge To Success Community Partnership
96. Children's Community School
97. Aquarion Water Company
98. Bushka Lumber & Millwork Co. LLC
99. Giuliano, Richardson & Sfara LLC
100. LaBonne's Market
- Medtronic
- SignPro
- Cigna Healthcare
- Target
- StayWell Health Care, Inc.
- Coilplus
- Waterbury Orthopaedic Associates
- Pitney Bowes
- Wal-Mart
- FedEx

*\*Italicized Are Partner Agencies*

# 2020-2021 FINANCIALS

## CAMPAIGN REVENUE AND OTHER SUPPORT

### CONTRIBUTIONS

Gross Multi-Year Campaign	4,304,025	4,202,400
Allowance for Uncollectible Pledges	(144,332)	(130,646)
Net Contributions	4,159,693	4,071,754

### OTHER CURRENT SUPPORT

Program Support (Campership, Homeless Connect, Bridge to Success)	518,180	478,213
Investment Income (Includes realized gain/loss on investments net of fees)	40,719	343,957
Corporate Sponsorship/Event Revenue	109,150	120,851
Administrative Fees	82,431	93,410
Miscellaneous Income	15,000	273,110
<b>Total Other Support</b>	765,480	1,309,541
<b>Total Revenue</b>	4,925,173	5,381,295

## ALLOCATIONS, DESIGNATIONS AND FUNCTIONAL EXPENSES:

### ALLOCATIONS AND DONOR DESIGNATIONS

Allocations, Program Support & Donor Directed to Funded Agencies	2,249,540	2,022,522
Donor Directed Designations to Misc. Nonprofits & Other United Ways	1,715,685	1,978,095
Total Allocations for Community Investments	3,965,225	4,000,617

### FUNCTIONAL EXPENSES

Allocations and Agency Relations	95,534	109,367
Community Planning	88,182	60,320
Community Relations	220,336	185,992
Program Support	193,831	229,886
<b>Total Program Services Expenses</b>	597,883	585,565

Corporate Sponsorship	70,044	51,347
Resource Development	271,799	260,302
Management and General	339,235	385,563
<b>Total Support Services Expenses</b>	681,078	697,212
<b>Total Functional Expenses</b>	1,278,961	1,282,777
<b>TOTAL EXPENSES</b>	5,244,186	5,283,394

<b>Change in Net Assets</b>	(319,013)	97,901
Unrealized gain and (losses) from investments net of fees	11,962	-
<b>Change in Net Assets</b>	(307,051)	97,901
<b>Net Assets, Beginning of Year</b>	1,583,774	1,276,723
<b>Net Assets, End of Year</b>	1,276,723	1,374,624

**88% OF EVERY DOLLAR IS INVESTED IN PROGRAMS AND SERVICES THAT HELP PEOPLE IN NEED**

Please visit our website at [unitedwaygw.org](http://unitedwaygw.org) to view our complete 2021 Audited Financials and IRS 990.



# 34TH ANNUAL

## UNITED WAY OF GREATER WATERBURY CELEBRATION & AWARDS

Each of these awardees reflect the spirit of the Greater Waterbury community, a willingness to help each other. We appreciate their dedication to the GReater Waterbury Community.



**PETER J. JACOBY, MD**

*Frederic and Lucy Kellogg Award*



**KATHY K. TAYLOR, JD, ESQ.**

*United Way Organized Labor Community Service Award*



**GREATER WATERBURY CAMBERSHIP FUND**

*Community Volunteer of the Year*



**TRAVER IDC**

*James C. Smith Spirit of Excellence Award*



**BANTAMWESSON**

*James C. Smith Spirit of Excellence Award*

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**Drew Marine**



**Webster Bank**

## PLATINUM



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**United  
Way**



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