



## Thank you!

As we near the end of the year, this is a time for reflection and gratitude, and we would like to thank you for being part of Char-Em United Way's Leadership Circle and/or running an employee campaign at your Workplace.

Your major support of our work helps us realize a vision of a stronger, healthier community. As a **Leadership Giver**, you impact critical health

and human service needs in profound and meaningful ways.

Leadership giving represents a level of involvement by those who have a deep commitment to the community and a desire to do more. In these especially challenging times, your support is helping us make a significant impact on the problems our neighbors face each day.

## New Projects in the Works

Over the past few years, we've moved beyond our traditional role of *only* investing in programs of other non-profit agencies. While we continue to annually make over \$250,000 of such investments, we are also seeking to fill gaps in local services.

We've started **Volunteer Connections**, taken the lead to start the **2-1-1 Information and Referral** hotline, and are playing a leadership role in the **Poverty Reduction Initiative**.

We are starting two new initiatives this year:

**Benefits Access**— With a new AmeriCorps position, we have just started a new project to help local residents access public and private benefits for which they are eligible. This will help them improve their families' financial stability and bring more funds into their pockets and our community. Watch for developments.

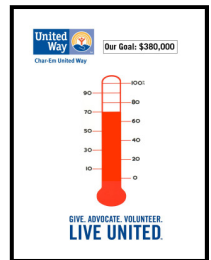
**Early Literacy** — We have identified pre-school and early grade literacy as areas where we would like to improve community impact. We are starting the United Way Literacy Corps to place volunteers in pre-school, elementary, and after-school programs. We are also exploring implementation of the *Dolly Parton Imagination Library* in the coming year, if we can secure sufficient financial support.

If you would like to learn more about these initiatives, let us know.

## Campaign Reaches 70% Final Push is on

We have just passed the 70% mark toward our \$380,000 campaign goal— a bit below this time last year.

We are optimistic that we will reach the goal and earn the additional \$20,000 challenge grant offered by the Frey Foundation. We hope that a final push for donations will take us to the top. *If you haven't yet donated to the campaign, please do!*



## Leadership Circle Parties

Many of our Leadership Circle members enjoyed special events hosted by our donors last summer.



*Steve Andreae, Reezie DeVet, Lynn Friendly, and Martha Lancaster chat.*

Thank you to Cass and Sam Williamson who hosted our annual **LC Thank You** party at their lovely Lake Charlevoix home.

Dave and Vicky Pendell and Bill and Joan Laimbeer hosted a party for LC members and prospective donors at the Bay View Country Club.

We appreciate their generosity and hospitality. If you would like to host next year's event (or a smaller gathering for prospective donors), please let us know. We hope to see you at next summer's events.

## The impact of your support

The support of our Leadership Circle members is critical to our ability to meet community needs. Last year, leadership gifts made up 74% of our campaign funds. The impact of this support is significant.

Leadership giving begins at **\$500**. In 2010, 100 individuals, couples, families, and businesses gave at this level. Support of \$500 can provide: four months of preschool for a 3 year old or fund the *Volunteer Connections* program for a week.

Forty-seven donors gave at the **\$1,000 level**. Each of these donors provided support such as 3 tons of bulk cereal for re-packing and delivery to food pantries or a match of an adult mentor and child for a year.

Support of **\$2,500 or more** — provided by 10 donors last year — is even more significant. Each of these gifts might support the new 2-1-1 Information and Referral Hotline for 1 month or fund a year of the Imagination Library for 80 kids.

**Thank you for your support of our 2011-2012 Campaign.**

## Success Stories from our Partners

### A Mentor makes a difference

Shane and Ron met when Shane was in the 3<sup>rd</sup> Grade. Just a few months after they were matched, Shane's teacher shared with Ron that Shane's absenteeism was a significant problem; he was absent no less than three days a week on average. The interesting thing she shared with Ron was that Shane NEVER missed a Thursday, the day they were scheduled to meet each week. Six months into their match, Shane had PERFECT attendance. About a year and a half into their match, Shane and his mom moved out of the area, but Ron and Shane remained in contact via email, letters, phone conversations, etc.

That was nine years ago. This past fall, Ron had a surprise visit from Shane at his office. Shane announced that he had moved back to the area and would be graduating from High School in June with honors!

### Adult Day Services aid client and caregiver

Susan called the adult day center for help with her mother who has Alzheimer's disease and had recently come to live with her and her family. Unfortunately her mother's behavior was beginning to interfere with her



family dynamic. By the time she called, she was in tears and not sure of what to do. Her mother kept wandering off as well being combative, and Susan was at her wits end. The staff at the adult day center considered this to be an emergency situation. Susan's health, well being and even family were in jeopardy. Since

bringing her mother into the program full time, Susan has seen a tremendous difference in her as well as the rest of the family. Without adult day services she would most likely have had to put her mother into a skilled nursing facility. The center provided the caring, safe environment that the mother needed and gave Susan the help and respite that she desperately needed.

### Food Pantry provides safety net

Jane has just reached retirement age so that she is able to draw Social Security, and she also has a small pension from her deceased husband. But, the two together just are not enough for her to live on for the month. She has not been able to find a regular job, but does odd jobs when she can find them. She comes to the pantry only when she is desperate, and takes only what she absolutely needs to get her through to her next check. Jane explains, "There are others out there that need it more than I do." She and others like her are the reason that the pantry exists.



## New Members Join the Circle

Our 2010 Leadership Circle brochure, listing all donors to the 2010-2011 Campaign, is available on our website under **Our Partners**.

Since it was published, the Circle has grown by several new members:

Kathy and Hans Bruehl  
Jane Ferger  
Bret Keefe  
Charles Huebner and  
Melanie Manary  
Carol and Tom Ochs  
Michael and Noreen Parker  
Ann and Darrell Zavitz  
An Anonymous donor

*Thanks to all of you!*

## Strategic Plan Update Begins

Time flies. Our 2009-2011 Strategic Plan has reached the end of its life (and we are pleased to say that we achieved most of the objectives outlined in it!).

The Board of Directors is beginning to craft a plan to guide our next three or more years. The plan will build upon our current activities and incorporate best practices from United Way Worldwide.

We welcome your suggestions and input as we begin the process. You can read our current plan under the **About Us** section of our website.

## Tocqueville Society

Two new members have joined the Tocqueville Society so far this year.

We welcome:

Rob Pew and Susan Taylor  
Roger Skrobeck

We hope to double the size of our Tocqueville Society membership in the coming year. If you would like to **step up** your giving to that level over the next few years, please contact us.

## New Website

We now have a newly-configured website, with the same URL:

[www.charemunitiedway.org](http://www.charemunitiedway.org)

Please check it out.

There is lots of information on our current activities, news articles, an event calendar, blog, and more.

Our latest Audit and Form 990 are posted there (see **About Us**), as is our Community Impact report.

We would love your feedback on the new site.

## Focus Videos tell our story

Thanks to the special support of Ted and Brenda Frey, we have been able to produce a series of videos this year.

Our Campaign video provides an overview of our mission, work, and impact. Our 8 new **Focus videos** highlight aspects of our work. See what our supporters and volunteers say about opportunities to **Give, Advocate and Volunteer**.

The videos can be found on the home page of our website. We hope you'll watch them and share the links.



*Education Focus Video: Foster Grandparent, Ardith, tells why she reads to kids 4 days a week.*

We are currently recruiting volunteers to read to, mentor, and tutor kids. If you'd like to be part of this, let us know.

## 2012 Community Investment Process Begins

Our Allocations Committee recently reviewed new community needs data and set our investment process for the coming cycle. We have informed non-profit health and human service agencies serving Charlevoix and Emmet Counties of the opportunity to apply for funding. Our Citizen Review Panel will review applications in mid-April. Please let us know if you would like to serve on the panel this year. We'd love to have your participation and input.

### **Our Funding Priorities for the year are:**

**EDUCATION** – Helping children and youth achieve their potential.

#### **Priority Outcomes:**

- Children enter school developmentally on track in terms of literacy and social, emotional, and intellectual skills.
- Young people graduate from high school.
- Youth develop life and work skills to help them make a successful transition from high school to adulthood.

**INCOME** – Helping families become financial stable and independent, while ensuring that basic needs are met.

#### **Priority Outcomes:**

- Families have support for basic needs, including shelter and food.
- Youth and adults develop financial literacy skills.
- Lower-income families move toward financial stability.
- Community members have resources to overcome disasters and emotional or financial crises.

**HEALTH** – Improving people's health.

#### **Priority Outcomes:**

- Community members have access to basic & preventative health services.
- Youth and adults are healthy and avoid risky behaviors.
- Seniors and people with disabilities maximize their self-sufficiency.

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## **Our *Emerging Needs Fund* awards \$25,000**

Each spring, we set aside some funds for distribution later in the year. The *Emerging Needs Fund* gives us flexibility to respond to issues and programs that arise between our annual allocation cycle.

We recently awarded grants for: Benefits Access; Food Rescue; Volunteer Income Tax Assistance; and Emergency Utility Assistance.

**Your Email, Please** If you are receiving this by mail it is because we don't have your email address. We try to save money by minimizing printing and mailings. So if you use email, send us your address, please.

## MAJOR GIVING

If you want to make a significant impact on community needs, please consider a major gift this year. A charitable investment made through United Way helps us address the pressing Education, Income, and Health needs in our community.

### **Endowment Donations**

We maintain endowment funds at both the Petoskey Harbor Springs Area and the Charlevoix County Community Foundations. Gifts to these funds are held in perpetuity and the earnings used to support our operations in the years to come.

This is the final year that donations to endowments held by Community Foundations are eligible for **Michigan Tax Credits**, so this is a good time to contribute to our Funds.

### **Charitable Gift Annuities**

Are you interested in this planned giving option? If you would like to meet with an advisor from the Petoskey-Harbor Springs Area Community Foundation and get more information about Charitable Gift Annuities, let us know. There is no obligation for you to set up a CGA.

### **Tocqueville Society**

Donors of \$10,000 or more are including in our Tocqueville Society. This includes gifts to our annual campaign, for special initiatives, planned gifts, and/or endowment contributions.

**Remember us  
at Tax Time**

Michigan tax payers can contribute to United Way through a check off on your tax return. Donations go to the local United Way, based on your filing zip code. Please share your tax refund with Char-Em United Way!

