

# ANNUAL REPORT 2009

UNITED WAY  
OF CANADA –  
CENTRAIDE  
CANADA



United Way  
of Canada



Centraide  
Canada

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Critical to the success of United Ways – Centraides' (UWs-Cs) community impact work is our ability to act as a Movement; to connect and collaborate with one another as we strive to improve social conditions in our communities. At the national level, United Way of Canada – Centraide Canada (UWC-CC) has focused on priorities to strengthen the UWC Movement. Within a relatively short time, innovative ideas have been put into place nationally that serve to build capacity within our Movement; enhance our collective knowledge; facilitate learning and sharing; foster networks and partnerships; and improve our brand presence.

Upon approving the 2009 – 2012 Strategic Plan, the National Office committed to providing an annual 'report card' on progress against the plan. Both the Board and the National Office have implemented use of a dashboard, a tool created to monitor progress against our strategic priorities. The tool will enable us to ensure initiatives and resources are on plan, on time, and on budget, and it will allow us to make course corrections as new or unforeseen activities arise going forward.

The Board of Directors underwent changes in 2009 so that we may more effectively advance on our priorities. In particular, a Membership Committee was established to enable Board oversight of the UWC Membership Agreement and to maintain a regular overview of members' needs, responding to challenges they face, and capacity-building activities.

In addition, the Board decided to move away from having formal positions of Regional Vice-Chairs, with the exception of Quebec. Instead, Board Members are going to also serve as active 'representatives' of their regions, participating in regional and other members' meetings and communicating Board activities with the Movement. This decision is in alignment with the By-law changes made in 2006.

The Board approved two major investments for 2009 – 2010: developing a new Brand framework, and creating the Knowledge Portal. In support of the

development of the Brand framework, the Board approved a contract with EKOS Research, one of the leading public opinion research firms in Canada, to undertake quantitative and qualitative research to learn how the UWC brand is perceived across the country, as well as to understand how our Movement understands our mission. The final results and analysis were presented at the UWC-CC Board meeting at the end of September. The research revealed our strengths and weaknesses; how we are perceived by donors and stakeholders; and how our community impact mission is perceived; among many other critical insights. Of particular interest is the strong support Canadians showed for our shift to community impact. This comprehensive research will be extremely valuable in moving forward on a national brand framework.

As UWs-Cs work to address increasingly complex community issues, having the ability to easily connect with one another and access pertinent learning resources are of the utmost importance. Accordingly, the Knowledge Portal will improve our capacity to easily communicate and share information with one another. The Portal will also support collaborations across the Movement by providing the virtual space and technological features to facilitate such work.

Overall, it is clear to me during my first year as Board Chair that the momentum in our Movement to create recognizable impact is significant and growing. I would like to thank the UWC members for their continuing hard work and inspiring energy. I would also like to thank the staff at the National Office for their dedication and commitment to strengthening our Movement. Lastly, I would like to thank my fellow Board Members for their active engagement and passion throughout 2009. I am proud to be a part of this Movement and I look forward to the achievements that the next year will bring.

A handwritten signature in dark ink, appearing to read 'Louis Champoux'.

Louis Champoux, Chair



## PRESIDENT & CEO'S MESSAGE

2009 began with a sense of trepidation in our Movement. With the sudden, unexpected negative economic conditions Canada and the world experienced during the last months of 2008 and early 2009, UWs-Cs of all sizes commenced 2009 anticipating a tough year ahead both in raising resources and in meeting the increasing needs and challenges of vulnerable individuals and overwhelmed agencies.

While, as non-profit organizations, we are accustomed to "doing more with less", the magnitude of the economic downturn posed an historic threat to the health and vitality of our organizations and communities. Yet, in spite of the situation, UWs-Cs continued to improve lives and build stronger communities by adapting their strategies for cultivating donors and raising resources; by establishing effective collaborations with partners in order to undertake necessary research or deliver much-needed community programming; and by reducing internal inefficiencies in order to better serve local communities.

Accordingly, the mission we established in 2003, "to improve lives and build community by engaging individuals and mobilizing collective action" took deeper meaning in our response to the economic turbulences felt in communities. As Community Impact is about achieving meaningful, long-term improvements to quality of life in Canadian communities, the economic situation helped us to more tangibly understand the need to embody this mission and address not just the symptoms, but the root causes of social problems. Throughout the year, we at the National Office, along with our local members, continued on our transformational journey to advance our Community Impact agenda.

I am pleased with the National Office's progress to move forward on the strategic priorities we set out in our 2009 – 2012 Strategic Plan.

The Marketing and Communications Team worked closely with EKOS Research Associates to complete national research

on Brand, providing us for the first time with consistent cross-country data on how the public understands our Movement and how our employees and volunteers perceive our Movement and our work. This research has provided the necessary foundation for the Brand repositioning work that will be undertaken in 2010.

The newly created Membership Team finished a multi-faceted portrait of our Movement. The portrait provides an integrated means of assessing and analyzing data which speaks to the health of our Movement, serving as a benchmark for the National Office to determine how the Movement is transforming to Community Impact; which UWs-Cs may be in need of support and/or capacity building; and which ones may be at risk.

The Resource Development Team launched a process to enhance our Resource Development capacity. In these uncertain economic times, the demand to raise more resources is more critical than ever. The new work is more costly and complex, demanding more resources. The objective is now to respond more effectively to donors while creating long term relationships.

The Learning Team began work on creating a Knowledge Portal for the Movement, one of our top priorities for 2009 – 2010. Regarding the Standards of Excellence (SOE), UWC-CC and our network of SOE facilitators supported sixteen local UWs-Cs to assess and develop action plans to advance the SOEs in 2009. In addition, UWC-CC trained an additional six new facilitators, increasing our capacity to support UWs-Cs across the country.

Regarding 211, 211 services in Ontario were extended to residents of Grey and Bruce counties; as well as Peterborough; Northumberland; Haliburton; the City of Kawartha Lakes; and Sault Ste Marie in 2009, ensuring that over 50% of Ontario's residents have access to 211. Efforts were made at the systems level (nationally) to promote the 211 service as a community partner in dealing with the H1N1 pandemic.

Involvement varied across the country, but new partnerships related to H1N1 were forged locally, provincially and nationally, with 211 services relieving over-burdened health lines, particularly during the early weeks of the vaccination roll-out. This experience continues to affirm 211's value to Canadian communities.

At the National Office, we have maintained our commitment to our strategic priorities because of the value this work brings to strengthening our collective as we work to revitalize Canadian communities.

In addition, UWC-CC remains committed to the vision we share with the Canadian Labour Congress, namely to build a society which provides a wide range of social and public services of the highest quality which are universally accessible. I am pleased to share that the overwhelming majority of larger and medium-sized UWs-Cs now have labour representatives on their Boards of Directors and many smaller UWs-Cs are beginning to develop these relationships as well. These partnerships have led to a number of important joint initiatives at the local level, such as community-wide Action Centres for workers who have lost their jobs due to layoffs or closures. Other UWs-Cs and Labour Councils are working on affordable housing and anti-poverty issues.

An historic vote in the United States in May 2009 created the new United Way Worldwide organization. This has led to the creation of a task force here at UWC-CC to work through a number of challenges in establishing our relationship with this new entity.

Committed to organizational accountability and transparency, at the National Office we continue to work with our members and other organizations in our sector to improve the quality of our reporting. We are also engaged with Imagine Canada on a new accountability framework for charities across the country.

2009 has certainly been a challenging year but overall, UWs-Cs have exercised commendable adaptability and have remained positively committed to our Community Impact agenda. I thank everyone - our donors, partners, members, directors, other volunteers, and staff - for their continued support and commitment and I look forward to advancing our transformation forward in 2010.



Al Hatton, President and Chief Executive Officer



STRENGTHEN  
THE UW-C  
MOVEMENT

The economic turmoil we were faced with in 2009 placed additional pressures on the voluntary sector and UWs-Cs across the country. While some UWs-Cs felt the impact of the economic downturn more directly than others, all UWs-Cs faced the challenge of striking a balance between our longer-term community impact work and providing short-term relief to vulnerable individuals as well as supporting agencies as large numbers of Canadians lost their jobs and savings and social service agencies faced dramatic funding cuts.

As a Movement, we responded quickly and positively to the situation. UWs-Cs adopted practical and innovative strategies to deal with growing demands, while also maintaining a commitment to long-term solutions.

The National Office also had to adapt in order to better lead and support local UWs-Cs during these turbulent times. The four-year Strategic Plan adopted in 2009 reflects the changing economic context and other emerging social trends by focusing on priorities and initiatives that would further enhance the Movement's capacity to create positive, recognizable social change in communities. Our work on these 5 strategic priorities – Brand, Capacity Building for our Members, Knowledge Mobilization and Learning, Resource Development, and Research and Public Policy - demonstrates how UWC-CC provides support and leadership to and with the Movement in realizing our collective Mission.

**Brand** is the manifestation of our mission in every aspect of our work and engagement with agencies and partners. In support of the Brand priority, UWC-CC hired a new Vice President, Marketing & Communications, to advance three key areas of brand building, brand stewardship and marketing & communications. In 2009, a clear commitment was made to develop a national Brand framework. An important foundation was achieved in 2009 with the pioneering research on brand conducted by EKOS Research.

Throughout 2009, UWC-CC focused on improving its external communications. Our new public website launched early in 2009, modernizing our online presence and promoting our Community Impact work through the Success Stories on our homepage provided by local UWs-Cs. The Communications team revamped the Weekly newsletter to establish it as the primary vehicle through which UWC-CC communicates with the Movement and it has become a central means through which UWs-Cs could share their successes. Furthermore, UWC-CC built greater awareness for the Movement's Community Impact work by highlighting the exciting new work local UWs-Cs are initiating in local communities across Canada.

**Capacity Building of our Members** is the intentional support through tools, skills development and business improvement strategies to enhance organizational performance. In 2009, the Membership team has become more strategic and proactive. The Membership team deepened its understanding and knowledge in this area, and has worked with UW-Cs to pilot and build new business models, and to support back office arrangements as well as merger initiatives. While some UWs-Cs have closed as part of a merger agreement to join a more sustainable and stronger organizational structure, the coverage of communities serviced by the Movement has remained steady or actually grown. In addition, the team developed a national Risk policy, and guidelines for strategic restructuring; documenting best practices and lessons learned which have aided our Movement in considering how to enhance our own operational footprint, and build sustainable business models.

Also in 2009, the Membership team prepared a substantial Portrait on the Health of the Movement, which identifies emerging trends, progress on our transformation work, capacity building needs, risks, and opportunities to pursue collaborative initiatives that strengthen operating systems of the Movement. In supporting capacity building initiatives,

a proactive financial assessment was done to ensure our Movement continues to exemplify transparent, effective and efficient financial management of our resources.

**Knowledge Mobilization and Learning** represents the National Office's commitment to developing a knowledge and learning infrastructure that leverages the collective experience of UWs-Cs and development of highly skilled staff and volunteers to fulfill the mission. In 2009, UWC-CC delivered a successful National Conference that focused on promoting networking and learning. UW-C staff and volunteers from across Canada took part in innovative learning sessions, including our first-ever Growing with Impact World Café sessions, which facilitated Movement-wide dialogue on how to be a high-impact non-profit. UWC-CC continued to support priority networks and communities of practice within our Movement that are exploring new ways of working collaboratively. The National Office also mobilized facilitation support, tools and resources for UWs-Cs seeking to assess their organization using the Standards of Excellence (SOEs), and work began on the development of the Knowledge Portal, which will improve access to shared policies, practices and learning resources.

To deepen our understanding of how UWs-Cs are using the SOEs or other resources in advancing their transformation to Community Impact, UWC-CC issued a survey to Executive Directors and CEOs of local UWs-Cs in the summer of 2009. The survey results revealed growing confidence and understanding of community impact. UWs-Cs are making progress on issues such as confirmation or adoption of a new mission statement, participation in collaborative community initiatives, priority setting, and use of program outcomes. The survey also revealed that more work is required to achieve alignment of staff and board roles, developing impact strategies, strategic planning, public policy engagement and aligning investments to priorities.

**Resource Development** refers to the strategies, tools, competencies and relationships inherent in mobilizing dollars, donors, volunteers and other assets in support of the Movement's mission. A priority in the 2009 – 2012 Strategic Plan is the Evaluation of the UW-C Resource Development Business Model. A SCORE Analysis led to three priority task-groups being formed to address Relationship Management; Segmentation and Engagement; and New Revenue Streams. The goal of each group is to establish shared understandings; identify and collect best and promising practices to enhance current and emerging revenue channels; and to find new opportunities to engage people and raise resources strategically in a changing environment.

The Resource Development team at the National Office also worked to develop effective research and trends/ risk analysis to provide timely and relevant information to Members on resource development trends. Accordingly, the Resource Development team instituted a bi-annual special edition of UWC-CC's Weekly newsletter – Philanthropic Trends and Issues.

Lastly, **Research and Public Policy** addresses the knowledge, skills and capacity to influence at a systems level government, business and voluntary sector policies in support of communities. The National Office worked with Summa Strategies Canada Inc. to build a government relations strategy. As part of this work, Summa worked with the National Office to craft messages related to building awareness of our Community Impact mission. Several Members of Parliament and senior officials were engaged and informed of the Movement's work as a result of the government relations strategy.

We continued to work closely with the Canadian Labour Congress to strengthen our partnership. This economic crisis has deeply affected working families and retirees and has drawn on the resources of both of our movements. Still, in hard-hit communities we have continued to see union members and other working people dig deep for their communities.

In 2009, the 211 Canada Steering Committee was renewed with ten new volunteer members representing UWs-Cs, information and referral organizations, business, emergency preparedness, the not-for-profit sector and other "N-11's". 211 has continued developing and it is now available to 10.3 million Canadians.

2009 began with great concern over the deteriorating economic situation. It was a tough environment to campaign in, and UWs-Cs across the country were faced with having to do more with fewer resources. Yet, we raised in excess of \$483 million, allowing us to fulfill our commitments to existing agencies and partners. There was a rekindled spirit of civic engagement and service throughout our Movement. Our Movement remains strong and UWC-CC will continue to work with UWs-Cs to enhance our effectiveness as a Movement and we will continue to provide strategic leadership within the voluntary sector, bringing clear guidance and positioning our Movement as innovators responding to current challenges, while focusing on longer-term solutions.





ENDORSE INNOVATION,  
PARTNERSHIPS,  
COLLECTIVE ACTION

# 2009 NATIONAL RECOGNITION AWARD WINNERS

## THE ANDRÉ MAILHOT AWARD

The André Mailhot Award is presented to an outstanding volunteer as recognition for exemplary leadership, commitment and achievement in the UW-C Movement.

**Larry Macdonald** has volunteered for over 20 years with the UW-C Movement. In 2001, he was awarded the Chair's Award of Distinction for his leadership and significant contribution to the UW-C Movement in Calgary. Eight years later, he continues to make a tremendous contribution to United Way of Calgary and UWC-CC, and an even greater contribution to UWs in other parts of the world.

Larry's spirit of philanthropy is to foster giving back in many ways and in many countries. One example of his leadership in this area is his work leading an international major gifts committee for United Way International (now United Way Worldwide). This committee raised over \$1.5 million in pledges and outright gifts from individuals from the implementation of the international Major Gifts Expansion Initiative, including a matching gift of \$300,000 from the Bill & Melinda Gates Foundation. As a result of this initiative, UW organizations in India, Singapore, Colombia, South Africa, Jamaica, Hungary and Russia have piloted major donor societies.

Through these and other activities, Larry has clearly demonstrated an unparalleled level of dedication and commitment to the UW-C Movement, its strength and its future.

## THE EXCELLENCE AWARD

The Excellence Award honours the extraordinary skills, leadership, vision and commitment of a staff member in the UW-C Movement.

Since 1997, **Ruth Ramsden-Wood** has served the community as the President and CEO of the United Way of Calgary and Area. Ruth also serves on several leadership committees and other not-for-profit boards in Calgary. In 2007, Ruth was awarded the Woman of Vision award from Global TV and YWCA Calgary for her passion and collaborative approach to solving complex social issues. She was also selected as one of Canada's Top 100 Most Powerful Women by the Women's Executive Network in 2007 and has been awarded honorary degrees from the University of Calgary and Mount Royal University. Ruth was named Calgary's 2008-2009 "Business Woman of the Year" by the Consumers Choice Institute, which acknowledges that she has earned the trust and loyalty of consumers through her work. In her time with UW-C, Ruth has demonstrated her commitment to a national Movement through membership on numerous task forces and a deep commitment to the innovative thinking within the UW-C Movement and a performance-based culture.

## THE COMMUNITY BUILDER AWARD

The Community Builder Award recognizes a multi-sectoral project that involves partners, stakeholders, donors and volunteers and which has resulted in innovative efforts to build caring communities in Canada.

**The 211 Ontario network** was given this award in 2009 for its trailblazing work to establish 211 services across the province. 211 is an innovative new tool that more and more communities are turning to for improving access to human services, to assist in coping with natural disasters or health crises, and to help with service planning. In Ontario, a dedicated team has worked together, formulating an ideal vision of 211 services for all Ontario residents.

The team includes many UW-C representatives from several Ontario cities, working with information and referral colleagues, municipal governments, provincial government representatives and other community planners to realize their objectives. Some very exciting milestones have occurred along the way, including obtaining funding from the Province of Ontario, which will help to ensure that the ultimate goal of province-wide service be accomplished.

## THE CHAIR'S AWARD OF COLLABORATION

The Chair's Award of Collaboration recognizes a UW-C or UWs-Cs whose leadership and collaborative spirit strengthens the UW-C Movement in Canada.

**United Way of Peterborough & District** has been instrumental in supporting the collaborative capacity among UWs-Cs in its part of Ontario.

A recent and exciting collaboration that they have undertaken is in the area of Program Outcome Measurement. Working as the lead United Way, Peterborough has partnered with three other UWs to bring the valuable tool of Outcome Measurement to Central East Ontario. The Outcome Measurement process is critical to supporting Community Impact. This process creates a system that delivers constant measurable feedback, enabling agencies to strategically improve programs and services. It also identifies program areas requiring improvement and gaps in service delivery, ensuring maximized effectiveness in serving the community.

The results have been impressive, with 500 board members and over 50 fund distribution volunteers trained in Outcome Measurement, 19 volunteers and staff trained as outcome facilitators, and 40 agencies trained in Outcome Measurement. These are the results for two years of the project, with another three to go. Once completed, close to 100 agencies will have received this training.

## THE PARTNERSHIP BUILDER AWARD

The Partnership Builder Award is a new award which celebrates the long-standing partnership between the UWC and labour movements, recognizing the importance of our work together.

**Heather Grant-Jury** has been committed to both her national and local community for many years. At age 23, Heather became the first woman President of the Winnipeg Labour Council and established a relationship with United Way of Winnipeg and its many partners in the community. In 1995, Heather joined the UWC-CC Board of Directors, and in 1999 she became the first labour representative to serve as Board Chair. She has worked with numerous other Winnipeg non-profit organizations, and her insight and guidance have been instrumental in recently launching the Poverty Reduction Council.

In 2007, Heather was Campaign Chair for United Way of Winnipeg. Her leadership reinvigorated relationships and with Heather at the helm, the campaign surpassed their fundraising goal. Heather embodies the fundamental principles of labour and UWC and is known for her passion and drive as a leader, as a community member, and as a human being.

## THE CHAIR'S AWARD OF DISTINCTION

The Chair's Award of Distinction recognizes the critical role of volunteers, their sustained dedication to the UWC Movement as well as their leadership, commitment and respect. There are up to five recipients each year.

**Bruce Williams** is a member of the campaign cabinets of numerous UWs in British Columbia and has also served as a Board member for the United Way Central and Northern Vancouver Island. As the emcee for the Kick off Breakfast in Victoria, Duncan, Nanaimo, Comox and Campbell River, Bruce has been an incredibly active participant in UW's success. Through his work as a weatherman and philanthropist, Bruce has raised over \$50,000 for the United Way Central and Northern Vancouver Island in the Nanaimo area alone. With his long history of contribution to UWs in British Columbia, as well as numerous other non-profit organizations, Bruce has demonstrated an exemplary commitment to his community.

**Mark Winfield** was the founding Chair of the United Way of Lunenburg County, one of the newest UWCs in the country. Under his leadership, the Lunenburg County United Way began its first full year campaign in 2004, generating just over \$90,000. This campaign has steadily grown by 20% per year to nearly \$180,000 in 2008. Mark was instrumental in developing a landmark outsourcing arrangement of United Way of Lunenburg County's administrative responsibilities to United Way of Halifax Region. Mark's dedication also extends to 211 Nova Scotia. His support for this project helped it gain acceptance among MLAs and community leaders in the region. Throughout the past six years, Mark has remained a committed local board member and an active expert spreading his support to Lunenburg County and across the UWC Movement.

## THE CHAIR'S AWARD OF DISTINCTION

(CONTINUED)

**Cathy McIntyre** joined the UWC-CC Board in 2003 and chaired UWC-CC's Brand Identity, Strategy & Management Task Group from 2004 to 2006. Her leadership in this area continued as Chair of the Board's Committee on Brand & Communications. Prior to joining the UWC-CC Board, Cathy served on the United Way of Greater Victoria's Board of Directors. Cathy's contributions go beyond the UWC Movement, as she is also a Past President of the University of Victoria Alumni Association, a Director of the Certified Management Accountants Society of BC, a former Director of Pacific Sport Victoria, and a former Director of the Craigdarroch Castle Historical Museum Society. Never one to say no when help is needed, she brings her calm and caring style to every endeavour.

**Catherine Comben** is a long-standing community volunteer whose work spans her own community of Kelowna, the province of British Columbia and Canada. Her contributions include serving for ten years on the Board of the United Way of the Central and South Okanagan / Similkameen and serving on the UWC-CC Board of Directors. She was also Chair of the University of BC Okanagan Alumni Chapter and a member of the UBC Alumni Association Board of Directors, Vice-President of the Rotary Club of Kelowna and Past-President of the Kelowna Chamber of Commerce. Catherine operates her own financial services firm, and while she knows about returns on investments in her professional life, it is clear that she believes in investing in the community as well.

**Lynne Mulder** is the past President and Campaign Chair of United Way of Central Alberta and is also an active volunteer with organizations such as Parkland Youth Homes, SPCA, Westerner Exposition Board and Parkland Airshed Management Zone. She also is a councillor with the City of Red Deer. During her tenure as a member of the UWC-CC Board of Directors she was a passionate voice for both the small and remote UWs in the Prairies. She also worked tirelessly as Regional Vice-Chair to connect with local UWs to understand their challenges and represent their collective interests on the national Board. Lynne's sense of humour, passion for UWC and balanced approach were appreciated by her fellow Board members and added a special sparkle to national Board meetings and events.

The UW-C Movement builds healthy, strong and respectful communities by working with individuals and organizations to pool their resources, energy and goodwill. The Thanks a Million Award recognizes the corporations and unions that have facilitated their employees or members raising \$1 million or more in 2008 for UWs-Cs across the country.

UWC-CC extends its top honours and gratitude for their generosity and commitment to their communities.

## CORPORATIONS

Agrium  
Bell Canada, its employees and retirees  
Best Buy & Future Shop  
BMO Financial Group  
Brookfield Group (including Brookfield Asset Management, Brookfield Homes, Brookfield Properties, Norbord, Royal LePage and Trisura Insurance)  
Caisse de dépôt et placement du Québec, its subsidiaries and employees  
Canada Border Services Agency  
Canada Post and its Employees Across Canada  
Canada Revenue Agency  
Canadian Natural Resources Limited  
Canadian Pacific Railway Limited  
Canwest  
Cargill Limited  
CGI Group and its employees  
Chrysler Canada Inc.  
CIBC  
City of Toronto  
CN and its employees  
ConocoPhillips Canada  
Costco Wholesale  
Deloitte  
Department of Justice Canada  
Department of National Defence  
Devon Canada Corporation  
Enbridge Inc.  
Environment Canada with the Canadian Environmental Assessment Agency and Parks Canada Agency  
Ernst & Young LLP  
Esso Imperial Oil, and their employees and annuitants / ExxonMobil Canada, and their employees and annuitants  
Federal Service Retirees  
Ford Motor Company of Canada, Limited and Employees  
Foreign Affairs and International Trade Canada  
GE Canada  
General Motors of Canada Limited and their Employees  
Gouvernement du Québec  
Government of Canada Workplace Charitable Campaign  
Great-West Life, London Life and Canada Life  
Health Canada  
HSBC Bank Canada  
Human Resources and Skills Development Canada and Service Canada  
Hydro-Québec, its employees, retirees, unions and associations  
IBM Canada Ltd.

James Richardson & Sons, Limited and Affiliated Companies:

- Richardson International Limited
- Richardson Financial Group Limited
- Richardson Capital Limited
- Richardson Partners Financial Limited
- Tundra Oil & Gas Limited
- Lombard Place Limited

KPMG LLP

LCBO

Manulife Financial

McCarthy Tétrault LLP

Mouvement Desjardins

National Bank Financial Group, its employees and retirees

Nexen Inc.

Ontario Public Service

Osler, Hoskin & Harcourt LLP

Petro-Canada

Power Corporation of Canada and its employees

Pratt & Whitney Canada and its employees

PricewaterhouseCoopers LLP

Procter & Gamble Inc.

Provincial Government Employees of Alberta

Public Works and Government Services Canada

RBC

Rio Tinto Alcan Inc. and its employees

Rogers Communications Inc.

Scotiabank Group

Shell Canada Limited

Spectra Energy

Sun Life Financial

Suncor Energy Inc.

Syncrude Canada Ltd.

Talisman Energy Inc.

TD Bank Financial Group

The J. Armand Bombardier Foundation & family members, Bombardier Inc. and its employees

The PCL family of companies

Toronto Transit Commission

TransAlta Corporation

TransCanada Corporation

UPS Canada / UPS SCS Canada

Vale Inco/United Steelworkers Sudbury Operations

WorleyParson

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## UNIONS

Alberta Union of Provincial Employees (AUPE)

Amalgamated Transit Union (ATU)

Association of Management, Administrative and Professional Crown Employees of Ontario

Canadian Federation of Nurses Union and its member organizations (CFNU)

Canadian Labour Congress (CLC)

Canadian Office and Professional Employees' Union (COPE)

Canadian Union of Postal Workers (CUPW/STTP)

Canadian Union of Public Employees (CUPE)

CAW – Canada

City of Toronto Administrative, Professional and Supervisory Association Inc.

Communications, Energy and Paperworkers Union of Canada (CEP)

International Association of Fire Fighters (IAFF)

International Association of Machinists and Aerospace Workers (IAM&AW/AIM&TA)

International Brotherhood of Electrical Workers (FIOE)

National Union of Public and General Employees and its component unions (NUPGE)

Ontario Public Service Employees Union (OPSEU)

Public Service Alliance of Canada (PSAC)

Service Employees International Union (UIES)

Teamsters Canada (TC)

The Professional Institute of the Public Service of Canada

UNITE HERE

United Food and Commercial Workers International Union (UFCW)

United Steelworkers (USW)



DEMONSTRATE  
TRANSPARENCY  
& ACCOUNTABILITY



# AUDITOR'S REPORT TO MEMBERS

The accompanying summarized statements of financial position and summarized statement of operations are derived from the complete financial statements of United Way of Canada – Centraide Canada and United Ways of Ontario – Les Centraide de l'Ontario as at December 31, 2009 and for the year then ended on which we expressed an opinion without reservation in our reports dated January 29, 2010. The fair summarization of the complete financial statements is the responsibility of management. Our responsibility, in accordance with the applicable Assurance Guideline of The Canadian Institute of Chartered Accountants, is to report on the summarized financial statements.

In our opinion, the accompanying financial statements fairly summarize, in all material respects, the related complete financial statements in accordance with the criteria described in the Guideline referred to above.

These summarized financial statements do not contain all the disclosures required by Canadian generally accepted accounting principles. Readers are cautioned that these statements may not be appropriate for their purposes. For more information on the entity's financial position, results of operations and cash flows, reference should be made to the related complete financial statements.



Chartered Accountants, Licensed Public Accountants

Ottawa, Canada

January 29, 2010

# FINANCIAL STATEMENTS

## Summarized Statement of Operations

For the year ended December 31, 2009

United Way of Canada – Centraide Canada

	2009	2008
	\$	\$
<b>REVENUE</b>		
Membership dues	3,366,962	3,323,483
Donations	347,303	396,741
Fees and contributions	250,248	380,707
Amortization of deferred capital contributions	13,827	14,333
Interest	5,312	28,521
Miscellaneous	30,613	19,338
Project contributions	1,356,011	361,988
	<u>5,370,276</u>	<u>4,525,111</u>
<b>EXPENSES</b>		
Salaries and employee benefits	2,251,373	2,082,973
Professional and consulting fees	423,436	285,466
Conferences, meetings and travel	555,938	770,223
Board of Directors' meetings and travel	136,151	167,532
Other travel	81,158	39,584
Office	272,178	316,556
Marketing and communication	10,564	69,027
Other services	73,941	73,857
Amortization of capital assets	106,005	106,045
United Way Worldwide subscription	35,000	35,000
Interest on obligation under capital lease	3,938	2,674
Projects	1,356,011	482,358
	<u>5,305,693</u>	<u>4,431,295</u>
Excess of revenue over expenses	64,583	93,816
Net assets, beginning of year	742,778	648,962
Net assets, end of year	<u><u>807,361</u></u>	<u><u>742,778</u></u>

# FINANCIAL STATEMENTS

CONTINUED

## Summarized Statement of Operations

For the year ended December 31, 2009

United Ways of Ontario – Les Centraide de l'Ontario

	2009	2008
	\$	\$
<b>REVENUE</b>		
Investment income (loss)	326,980	(366,849)
Conference registration	-	7,069
	<u>326,980</u>	<u>(359,780)</u>
<b>EXPENSES</b>		
Youth initiative	39,680	42,968
Meetings, conference and travel	19,654	30,357
Other	119	13,365
Government relations	-	79,132
	<u>59,453</u>	<u>165,822</u>
Excess (deficiency) of revenue over expenses	267,527	(525,602)
Unrestricted net assets - beginning of year	1,889,837	2,415,439
Unrestricted net assets - end of year	<u>2,157,364</u>	<u>1,889,837</u>

# FINANCIAL STATEMENTS

CONTINUED

## Summarized Statement of Financial Position

As at December 31, 2009

United Way of Canada – Centraide Canada

	2009	2008
	\$	\$
<b>ASSETS</b>		
Cash	432,109	871,903
Short-term investments	809,033	613,054
Amounts receivable	63,489	226,950
Prepaid expenses	94,036	61,448
	<u>1,398,667</u>	<u>1,773,355</u>
Capital assets	169,681	238,034
Investment in life insurance	52,475	50,407
	<u>1,620,823</u>	<u>2,061,796</u>
<b>LIABILITIES AND NET ASSETS</b>		
Liabilities		
Accounts payable and accrued liabilities	527,302	650,179
Deferred contributions	129,565	483,792
Current portion of obligation under capital lease	7,308	6,564
	<u>664,175</u>	<u>1,140,535</u>
Obligation under capital lease	24,667	31,975
Deferred capital contributions	12,217	26,044
Leasehold inducement	59,928	70,057
Deferred revenue – life insurance	52,475	50,407
	<u>813,462</u>	<u>1,319,018</u>
Net assets		
Unrestricted	741,800	639,384
Invested in capital assets	65,561	103,394
	<u>807,361</u>	<u>742,778</u>
	<u>1,620,823</u>	<u>2,061,796</u>

# FINANCIAL STATEMENTS

CONTINUED

## Summarized Statement of Financial Position

As at December 31, 2009

United Ways of Ontario – Les Centraide de l'Ontario

	2009	2008
	\$	\$
<b>ASSETS</b>		
Cash	19,991	5,361
Accounts receivable	44	17,449
	<u>20,035</u>	<u>22,810</u>
Investments	2,155,334	1,897,169
	<u>2,175,369</u>	<u>1,919,979</u>
<b>LIABILITIES AND NET ASSETS</b>		
Liabilities		
Accounts payable and accrued liabilities	<u>18,005</u>	<u>30,142</u>
Net assets		
Unrestricted	2,157,364	1,889,837
	<u>2,175,369</u>	<u>1,919,979</u>

(A copy of the complete financial statements together with the auditors' report is available to any member on request to the President and Chief Executive Officer.)

# OUR UNITED WAYS – CENTRAIDES

## ALBERTA

Hinton United Way  
Lakeland United Way  
Lloydminster & District United Way  
United Way of Calgary and Area  
United Way of Central Alberta  
United Way of Fort McMurray  
United Way of Grande Prairie & Region  
United Way of Slave Lake Society  
United Way of South Eastern Alberta  
United Way of Lethbridge and South Western Alberta  
United Way of the Alberta Capital Region

## BRITISH COLUMBIA

Castlegar District United Way  
Cowichan United Way  
Powell River & District United Way  
Thompson, Nicola, Cariboo United Way  
United Way Central and Northern Vancouver Island  
United Way of Cranbrook and Kimberley  
United Way of Greater Victoria  
United Way of North Okanagan Columbia Shuswap  
United Way of Northern British Columbia  
United Way of the Central & South Okanagan/Similkameen  
United Way of the Fraser Valley  
United Way of the Lower Mainland  
United Way of Trail and District

## MANITOBA

Carberry & North Cypress United Way  
Carman and Community United Way Incorporated  
Neepawa & District United Way Inc.  
Portage Plains United Way  
The Pas & District United Way  
United Way of Brandon & District Inc.  
United Way of Morden & District  
United Way of Winnipeg  
Winkler & District United Way

## NEW BRUNSWICK

United Way of Greater Moncton & Southeastern New Brunswick Region Inc.  
United Way of Greater Saint John Inc.  
United Way/Centraide Central N.B./  
Région du Centre du N.-B. Inc.

## NEWFOUNDLAND AND LABRADOR

United Way of Newfoundland and Labrador

## NOVA SCOTIA

United Way of Cape Breton  
United Way of Colchester County  
United Way of Cumberland County  
United Way of Halifax Region  
United Way of Lunenburg County  
United Way of Pictou County

## NORTHWEST TERRITORIES

United Way of Yellowknife

## ONTARIO

Brant United Way  
Centraide - United Way Prescott-Russell  
United Way of Elgin-St.Thomas  
Kirkland Lake & District United Way  
Northumberland United Way  
Porcupine United Way  
Renfrew County United Way  
United Way for the City of Kawartha Lakes  
United Way of Ajax-Pickering-Uxbridge  
United Way of Bruce Grey  
United Way of Burlington & Greater Hamilton  
United Way of Cambridge and North Dumfries  
United Way of Chatham-Kent  
United Way of Greater Simcoe County  
United Way of Guelph and Wellington  
United Way of Haldimand and Norfolk  
United Way of Halton Hills

United Way of Kitchener-Waterloo and Area  
 United Way of Lanark County  
 United Way of Leeds and Grenville  
 United Way of London & Middlesex  
 United Way of Milton  
 United Way of Niagara Falls and Greater Fort Erie  
 United Way of Oakville  
 United Way of Oshawa-Whitby-Clarington-Brock & Scugog  
 United Way of Oxford  
 United Way of Peel Region  
 United Way of Perth-Huron  
 United Way of Peterborough & District  
 United Way of Quinte  
 United Way of Sarnia-Lambton  
 United Way of Sault Ste. Marie & District  
 United Way of South Georgian Bay  
 United Way of South Niagara  
 United Way of St. Catharines & District  
 United Way of Stormont, Dundas & Glengarry  
 United Way of Thunder Bay  
 United Way of York Region  
 United Way serving Kingston, Frontenac,  
 Lennox and Addington  
 United Way Toronto  
 United Way/Centraide Ottawa  
 United Way/Centraide Sudbury and/et District  
 United Way/Centraide Windsor-Essex County

#### PRINCE EDWARD ISLAND

United Way of Prince Edward Island

#### QUEBEC

Centraide Abitibi Témiscamingue et Nord-du-Québec  
 Centraide Bas-Saint-Laurent  
 Centraide Centre-du-Québec  
 Centraide of Greater Montreal  
 Centraide Duplessis  
 Centraide Estrie  
 Centraide Gaspésie-Îles-de-la-Madeleine  
 Centraide Gatineau-Labelle-Hautes-Laurentides  
 Centraide Haute-Côte-Nord/Manicouagan  
 Centraide KRTB-Côte-du-Sud  
 Centraide Lanaudière  
 Centraide Laurentides  
 Centraide Mauricie  
 Centraide Outaouais  
 Centraide Québec et Chaudière-Appalaches  
 Centraide Richelieu-Yamaska  
 Centraide Saguenay-Lac-Saint-Jean  
 Centraide Sud-Ouest du Québec

#### SASKATCHEWAN

Battlefords United Way Inc.  
 Eston United Way  
 Swift Current United Way  
 The United Way of Elrose & District Corp.  
 United Way of Estevan  
 United Way of Regina  
 United Way of Saskatoon & Area  
 Weyburn & District United Way  
 Yorkton & District United Way

#### YUKON

United Way Society of the Yukon



DEMONSTRATE  
VOLUNTEER  
LEADERSHIP



# BOARD OF DIRECTORS 2009 - 2010

## OFFICERS

**Chair**, Louis Champoux, QC

**Past Chair**

Douglas (Doug) Barrington, ON

**Senior Vice-Chair**, Peter Doig, NS

**Treasurer**, Marc Lalonde, NB

**Secretary**, Michelle Laurie, BC / Labour

**President and CEO**, Al Hatton  
(non voting member)

**Vice-Chair** – Vacant



## DIRECTORS

France Bergeron \*, QC

Walter Flasz, ON

Ted Garrard, ON

Stella Guy, QC

Kenneth (Ken) Howland, SK

Patrick Hull, BC

Janet Lafortune, ON

Rachel Larabie-LeSieur, QC

Oryssia Lennie, AB

Magali Loisel, QC

Gayle Metson, ON

Dr. Colin Saldanha, ON

Ivan Watson, BC

Michael Maclsaac  
(Ex-officio from CLC)

**Missing:**

Ricky Fontaine, QC  
Andrew Murphy, PEI



\* France Bergeron has resigned  
effective October 5, 2009

## REGIONAL VICE-CHAIR / QUEBEC REGION

Vacant

Al Hatton  
President & CEO

Eva Kmiecic  
Senior Vice-President

Robert Bédard  
Executive Assistant for Board, Regional Operations  
and the Membership Team

Sue Bergeron  
Administrative Assistant, Finance

Jacques Bérubé  
Chief Financial Officer

Dan Clement  
Vice-President, Learning

Diane Dumont  
Translator

Anne Guyot  
Translator

Nicole Hurtubise  
National Director, Membership Support and  
Policy Development

Stéphanie Imbault  
Researcher

Derrick Kelly  
Network Administrator

Clare LeBlanc Northcott  
National Director, Organizational Transformation

Kim Lockhart  
National Director, Learning Programs and Partnerships

Janice Manchee  
National Director, Labour Programs and Services

Daniel Manseau  
Vice-President, Quebec Region

Carmen Menard  
Executive Assistant to the President & CEO and  
Office Operations Manager

Bonnie Morris  
Vice-President, Resource Development

MaryAnn Notarianni  
Communications Coordinator

Émilie Potvin  
Vice-President, Marketing & Communications

Louise Powell-McCarthy  
National Director, Knowledge Exchange

Kathryn Render  
Learning Team Coordinator

Dan Richer  
Controller

Linda Roseneck  
National Director, Membership Support

Thomas Shepherd  
Field Executive

Deborah Spurr  
National Director, 211 Initiative

Natalie Toke-Mason  
Resource Development Coordinator