



Middlesex
UNITED WAY



2025 ANNUAL REPORT



IN MEMORIAM



Harold Brown
1956 - 2025



Woodbridge "Woody" D'Oench
1931 - 2025



Charles "Chip" Stone, Jr.
1928 - 2025

In 2025, Middlesex United Way lost three extraordinary leaders whose dedication helped shape our organization across decades of service. Each served with distinction as a member of our Board of Directors and as a Campaign Chair, leaving an enduring legacy of generosity, leadership, and commitment to the well-being of our community.

Their guidance strengthened Middlesex United Way during pivotal moments in our 90-year history, and their impact continues to be felt through the lives and organizations they supported. We honor their memories with deep gratitude.





PRESIDENT'S MESSAGE

SHAWONDA S. SWAIN

As we gather for our Annual Meeting, I am filled with gratitude, pride, and deep optimism for the future of Middlesex United Way.

There is no question that the past year and the years surrounding it have tested us. Our community has faced economic uncertainty, increased demand for services, and moments that required us to stretch beyond what felt comfortable or even possible. Yet, time and again, this organization has done what it has always done best, we showed up. We adapted. We stayed rooted in our mission and unwavering in our commitment to the people of Middlesex County.

That resilience does not happen by chance. It happens because of people who give their time, their talent, and their treasure. I want to extend my heartfelt thanks to our Board of Directors for your leadership, stewardship, and steady guidance, especially during challenging moments. To our staff team: your diligence, creativity, and commitment to excellence make our impact possible every single day. You are the engine that drives this work forward. And to our donors, volunteers, partners, and supporters your belief in this mission sustains us more than you know.

While we have navigated tough terrain, I am confident that we are emerging stronger, wiser, and well-positioned for what comes next. Middlesex United Way is in a good place not because the work is finished, but because we are ready. Ready to meet the next challenge. Ready to innovate. Ready to excel in service to our community.

As we look ahead, I ask each of you to accept a simple but powerful challenge - help us engage one new person. One new donor. One new volunteer. One new advocate. One new believer in the power of collective impact. Growth happens one relationship at a time, and each of you plays a vital role in expanding this circle of care.

On a personal note, December 28th marked my fourth year serving as President and CEO of Middlesex United Way. It is truly an honor to serve Middlesex County alongside such dedicated, compassionate, and mission-driven individuals. I am grateful for the trust you place in me and for the opportunity to lead this work with you.

As we close out the year, I wish you and your loved ones health, happiness, and prosperity. I also encourage you to continue lifting those who are most vulnerable—through Middlesex United Way, your faith communities, your neighborhoods, and your everyday acts of kindness. Together, we can and will continue to build a stronger, more resilient Middlesex County for all. Thank you for walking this journey with us. The best is yet to come.

With gratitude and hope,

OUR BOARD OF DIRECTORS

2025-2026



EXECUTIVE COMMITTEE

| | | | |
|--|---------------------------------|---|---------------------------------------|
| Gary Wallace Board Chair | Ramona Burkey Treasurer | Stephanie Fisher Chair, Emerging Leaders Society | Michele Boutin Chair, Women United |
| Alissa Delonge Vice Chair & Governance | Lakisha Hyatt Campaign Chair | Kevin Reich Chair, Community Impact Council | Kimberly Hogan Meg Slater |

BOARD MEMBERS

Rev. Robyn Anderson
Jon Brink
Allison Dowe
Barbara Holloman
Faith Jackson
Joshua Rivera
Kristen Roberts

HONORARY MEMBERS

| | | |
|---------------------------|----------------------------------|----------------------------------|
| Harry E. Burr Retired | Jean Adams Shaw Retired | Rosario A. Rizzo, Jr. Retired |
| David Reynolds Retired | William E. Wrang, III Retired | |

AT LARGE MEMBERS

Kimberly Hogan
Meg Slater



MIDDLESEX UNITED WAY VOLUNTEERS

BOARD COMMITTEE VOLUNTEERS

FUNDRAISING COMMITTEE

Lakisha Hyatt, Chair
Joshua Rivera
Barbara Holloman
Kevin Reich

GOVERNANCE COMMITTEE

Alissa DeJonge, Chair
Ramona Burkey
Gary Wallace
Meg Slater



FINANCE COMMITTEE

Ramona Burkey, Chair
Allison Dowe
Brian Kelleher*

AUDIT COMMITTEE

Brian Kelleher, Chair*
Allison Dowe
Ramona Burkey



COMMUNITY IMPACT COUNCIL

Kevin Reich, Chair
Gary Wallace
Barbara Holloman
Wilfredo Nieves*
Jon Brink
Terry Mitchell*
Mary Sue Cavanaugh*

HUMAN RESOURCES COMMITTEE

Kimberly Hogan
Faith Jackson



EMERGING LEADERS SOCIETY**

Stephanie Fisher, Chair



WOMEN UNITED**

Michele Boutin, Chair
Alissa DeJonge
Barbara Holloman
Ramona Burkey
Meg Slater
Kimberly Hogan
Faith Jackson
Allison Dowe
Kristen Roberts



*NOT CURRENTLY SERVING ON THE MIDDLESEX UNITED WAY BOARD OF DIRECTORS

**LISTS ONLY INCLUDE COMMITTEE MEMBERS WHO ARE CURRENTLY SERVING ON THE BOARD OF DIRECTORS

PAST UNITED WAY BOARD CHAIRS



1935 Bertrand E. Spencer

1936 E. Dudley Butler

1937 James McConaughy/James Bunce

1938 Rev. John O'Connor/W. W. Wilcox, Jr.

1939 Amor P. Smith

1940 Amor P. Smith

1941 Rev. John O'Connor

1942 Burton B. Fall

1943 Burton B. Fall

1944 J. Alfred C. Dodd

1945 J. Alfred C. Dodd

1946 Vincent R. Kiernan

1947 Elmer E. Schattschneider

1948 G. Eugene Goundrey

1949 G. Eugene Goundrey

1950 William F. Briggs

1951 William F. Briggs

1952 Howard B. Smith

1953 John W. Goodrich

1954 John W. Goodrich

1955 Arthur J. Connell

1956 Christie E. McLeod, MD

1957 Walter P. Staniszewski

1958 William C. Langley

1959 Donald C. Davis

1960 William J. O'Brien

1961 Nathan I. Shapiro

1962 Nathan I. Shapiro

1963 Richard J. O'Brien

1964 Vincent A. Amato

1965 John B. Newman

1966 Morton W. Briggs

1967 Woodbridge A. D'Oench

1968 Clifford R. Carlson

1969 Robert B. Brainard, Jr.

1970 George B. Raymond

1971 George B. Raymond

1972 Kenneth T. Hampton

1973 Kenneth T. Hampton

1974 Paul S. Carrier, Jr.

1975 William H. Chadwick

1976 William H. Chadwick

1977 Frank J. Sutkowski

1978 Betty Matteo

1979 Betty Matteo

1980 Daniel W. Potter

1981 Gordon B. McWilliams

1982 Gordon B. McWilliams

1983 Patrick J. Crowley

1984 Patrick J. Crowley

1985 Ralph H. Shaw, II

1986 Ralph H. Shaw, II

1987 Ralph H. Shaw, II

1988 Norton W. Cann

1989 Norton W. Cann

1990 William J. Russell

1991 William J. Russell

1992 Barbara M. Weiss

1993 Barbara M. Weiss

1994 Jean Adams Shaw

1995 Jean Adams Shaw

1996 Rosario Rizzo

1997 Rosario Rizzo

1998 Jane S. McMillan

1999 Andrew P. Rapp

2000 Andrew P. Rapp

2001 David L. Reynolds

2002 David L. Reynolds

2003 John Biddiscombe

2004 John Biddiscombe

2005 Kelly Smith

2006 Kelly Smith

2007 William E. Wrang, III

2008 William E. Wrang, III

2009 Faith M. Jackson

2010 Faith M. Jackson

2011 Gary Simonsen

2012 Gary Simonsen

2013 Clifford O. Straub

2014 Clifford O. Straub

2015 William Holder

2016 William Holder

2017 Patricia Charles

2018 Patricia Charles

2019 Scott Carlson

2020 Scott Carlson

2021 Kimberly Hogan

2022 Kimberly Hogan

2023 Meg Slater

2024 Meg Slater

PAST UNITED WAY CAMPAIGN CHAIRS



1935 Charles R. Hoover
1936 Elmer S. Hubbell
1937 Rev. Marion J. Creegar
1938 Rev. John O'Connor
1939 Rev. John O'Connor
1940 Rev. John O'Connor
1941 Ansel A. Packard
1942 Rev. George L. Whithey
1943 Elmer E. Schattschneider
1944 Vincent R. Kiernan
1945 Rev. George L Withey
 Vincent Keirnan
1946 Rev. Edward J. McKenna
1947 Rev. Alvin D. Johnson
1948 G. Albert Hill
1949 William F. Briggs
1950 Arthur J. Connell
1951 Howard B. Smith
1952 John W. Goodrich
1953 Richard F. Murray, Jr.
1954 Donald C. Davis
1955 Christie E. McLeod, MD
1956 William C. Langley
1957 William J. O'Brien, Jr.
1958 Creighton F. Magoun
1959 Ernest H. Nelson
1960 Nathan I. Shapiro
1961 John W. Macy, Jr.
1962 Richard J. O'Brien
1963 Vincent A. Amato
1964 John B. Newman

1965 Morton W. Briggs
1966 Woodbridge A. D'Oench
1967 Clifton R. Carlson
1968 Robert B. Brainard, Jr.
1969 George B. Raymond
1970 Everett G. Patterson
1971 Kenneth T. Hampton
1972 Richard R. Carella
1973 Eugene R. O'Brien
1974 William H. Chadwick
1975 Anthony S. Marino
1976 Frank J. Sutkowski
1977 Betty Matteo
1978 Chester A. Tibbetts
1979 Daniel W. Potter
1980 Gordon B. McWilliams
1981 Ralph H. Shaw, II
1982 Patrick J. Crowley
1983 Howard F. Kelley
1984 Barbara J. Maynard
1985 Norton W. Cann
1986 David M. Royston
1987 Harold Brown
1988 Joseph E. Milardo, Jr.
1989 James E. Coppage
1990 Charles "Chip" Stone, Jr.
1990-91 Donald M. Russell
1991-92 Robert G. Kiely
1992-93 Rick Bellows
1993-94 Ralph Shaw, II
 Jean Shaw
1994-95 Edward McMillan
 Jane McMillan
1995-96 John Beckert

1996-97 Harry Eben Burr
1997-98 Frank Sumpter
1998-99 David Audette
1999-00 Donald B. Wilbur
2000-01 Robert G. Kiely
2001-02 Peter Patton
2002-03 William Ryczek
2003-05 Wilfredo Nieves
2004-05 William E. Wrang, III
2005-06 Harry Eben Burr
2006-07 David L. Reynolds
2007-08 Gary Simonsen
2008-09 Deborah Bochain
2009-10 David Giuffrida
2010-11 Chandler J. Howard
 Larry McHugh
 Michael Roth
2011-12 Harry Eben Burr
 Arthur V. McDowell, III, MD
2012-13 Gary Gomola
2013-14 Vincent G. Capece, Jr.
2014-15 Patricia Charles
2015-16 Greg Treacy
2016-17 Kristen Roberts
2017-18 Kevin Reich
2018-20 Justin Carbonella
 Toral Maher
 Joe Santaniello
 Meg Slater
2020 Dr. Michael Conner
2021 William Holder
2022 Duncan Olaechea
 Marisol Rodriguez

COMMUNITY SERVICE AWARD

RAMONA BURKEY

Middlesex United Way is proud to honor Ramona Burkey with the 2025 Community Service Award. Burkey, a longtime volunteer with the local nonprofit, serves as the Director of Middletown's Russell Library.

The Community Service Award honors a community member who has gone above and beyond to support Middlesex United Way's work within the 15 towns it serves. It is the nonprofit's highest honor, typically presented to someone with a long-standing record of involvement in programs, initiatives, or agencies in Middlesex County.

Burkey became Director of Russell Library in 2018 and has been a prominent member of Middlesex United Way's team of volunteers ever since. She currently serves as the board's Treasurer and has been a part of the nonprofit's Women United affinity group for several years. Burkey also works closely with United Way staff to coordinate the City of Middletown's annual workplace campaign.

Over the years, Ramona has held a wide range of leadership roles, including Children's Librarian, Head of Children's Services, Assistant Library Director, and Library Director. Across each role, one constant has remained: her belief that libraries, and community institutions more broadly, must evolve to meet people where they are and respond thoughtfully to the challenges of the moment.

Prior to joining the Russell Library, she served for more than a decade as Library Director in Cheshire, Connecticut. Burkey holds degrees from both Yale University and Southern Connecticut State University, but she began her library career at just 14-years-old as a high school page in her hometown of Belfast, Maine. She now lives in Middletown with her husband, her teenage son, and three very energetic Border Collies.

Burkey's reliability, collaboration, and unwavering dedication have made a lasting impact across the 15 towns Middlesex United Way serves.



2025 HONOREES



COMMUNITY LEADERSHIP AWARD

Rev. Robyn Anderson

JUSTIN WILKIE NEXT GENERATION AWARD

Sonya Hadley and Briana Bellinger-Dawson

COMMUNITY IMPACT AWARD

STEAM Train Inc.

LIVE UNITED AWARD

Kasey Harding, Prevention Fund

Lorenzo T. Marshall, Sr.

Middletown Community Thanksgiving Project



PAST UNITED WAY AWARD WINNERS

COMMUNITY SERVICE AWARD

| | | | |
|---------------------------------|-------------------------------|-----------------------------|-------------------------|
| 1949 John C. Barry | 1969 John F. LaRosa | 1989 Patrick J. Crowley | 2011 Linda Ann Morales |
| 1950 Mrs. Frederick S. Hurlburt | 1970 Morton W. Briggs | 1990 Howard F. Kelley | 2012 Wilfredo Nieves |
| 1951 C. Eugene Goundrey | 1971 Henry Sherwood, MD | 1991 Donald M. Russell | 2013 William Holder |
| 1952 William F. Briggs, Sr. | 1972 Clair B. Crampton, MD | 1992 William J. Russell | 2014 Gary Simonsen |
| Robert B. Brainard, Sr. | 1973 Mrs. John W. Spaeth | 1993 Carl A. Capello | 2015 Deborah C. Bochain |
| J. Alfred C. Dodd | 1974 Woodbridge A. D'Oench | 1994 Thomas H. Stickney | 2016 David Director |
| 1953 Morris S. Wrubel | 1975 Everett G. Patterson | 1995 Barbara M. Weiss | 2017 Clifford O. Straub |
| 1954 Mrs. Carroll A. Campbell | 1976 Robert B. Brainard, Jr. | 1996 Joseph E. Milardo, Jr. | 2018 Kristen Roberts |
| 1955 Miss M. Elizabeth Murphy | 1977 Andrew F. Johnson | 1997 Robert J. DeJonge | 2019 Matthew Stillman |
| 1956 Frederick S. Hurlburt | 1978 Sturges G. Redfield, Jr. | 1998 Rosario A. Rizzo, Jr. | 2020 Jean D'Aquila |
| 1957 Howard B. Smith | 1979 Paul S. Carrier, Jr. | Ralph D. Strong, Jr. | 2021 Pat Charles |
| 1958 Christie E. McLeod, MD | 1980 George B. Raymond | 1999 Harry Eben Burr | 2022 Kim Hogan |
| 1959 John B. Goodrich | 1981 Kathryn I. Briggs | 2000 Jane S. McMillan | 2023 Kevin Reich |
| 1960 Donald C. Davis | 1982 Shirley F. Shapiro | 2001 John S. Biddiscombe | 2024 Meg Slater |
| 1961 Mrs. Harry B. Rosener | 1983 Daniel W. Potter | 2002 Donald B. Wilbur | |
| 1962 William C. Langley | 1984 Frank J. Sutkowski | 2003 Andrew P. Rapp | |
| 1963 Clair B. Crampton, MD | 1985 Gordon B. McWilliams | 2004 David L. Reynolds | |
| 1964 Nathan I. Shapiro | 1986 Edward D. Stites | 2005 Earl S. Brown | |
| 1965 Richard J. O'Brien | 1987 Russell G. D'Oench, Jr. | 2006 Douglas W. Johnson | |
| 1966 Vincent A. Amato | 1988 Richard R. Carella | 2007 Faith M. Jackson | |
| 1967 John B. Newman | 1989 David M. Royston | 2008 Kelly Smith | |
| 1968 Mrs. Victor L. Butterfield | 1990 Jean Adams Shaw | 2009 Patti Anne Vassia | |
| | Ralph H. Shaw, II | 2010 William E. Wrang, III | |

COMMUNITY LEADERSHIP AWARD

| | | |
|------------------------------|-------------------------|---------------------------|
| 2006 Douglas & Midge Bennett | 2013 Rosa Carrero | 2019 Dr. Michael Conner |
| 2007 Arlene Rosener Mazzotta | 2014 Christine Fahey | 2021 Gary Wallace |
| 2008 Reverend Moses Harvill | 2015 Rob Rosenthal | 2022 Pastor Moses Harvill |
| 2010 Elizabeth Morgan | 2016 Joseph Santaniello | 2023 Judy Sullivan |
| 2011 Willard McRae | 2017 Lorenzo Marshall | 2024 Anita Ford-Saunders |
| 2012 Joan Youngs | 2018 Cathy & Bob Boone | |

COMMUNITY IMPACT AWARD

| | | |
|---|---|---|
| 2006 Clinton Public Schools and Youth & Family Services | 2012 Middletown Adult Education | 2018 Columbus House |
| 2007 Community Health Center | 2013 Middlesex YMCA | 2019 Child and Family Agency of Southeastern CT |
| 2008 Amazing Grace & SSKP | 2014 MARC Community Resources | 2021 Gilead Community Services |
| 2010 Partners in the Healthy Communities | 2015 Shoreline Soup Kitchens & Pantries | 2022 Middlesex Habitat for Humanity of CT |
| 2011 HOPE Partnership | 2016 The Coalition for Housing and Homelessness | 2023 Literacy Volunteers Valley Shore |
| | 2017 The Connection, Inc. | 2024 Oddfellows Playhouse Youth Theater |

TOCQUEVILLE SOCIETY PHILANTHROPY AWARD

| |
|---|
| 2006 Paul & Sally McConnell |
| 2007 Peter Harding |
| 2008 The Director Family |
| 2010 Chandler Howard |
| 2011 Herb & Sherry Clark |
| 2012 The Guilmartins |
| 2013 Harry Eben Burr |
| 2014 William E. Wrang, III |
| 2015 John Sullivan |
| 2016 The Community Foundation of Middlesex County |

| |
|----------------------------|
| 2017 Vincent Capece |
| 2018 Bill & Sharon Griffin |
| 2019 Laura Pedersen |
| 2021 David Glidden |
| 2022 William J. Ryczek |
| 2023 David L. Reynolds |

| |
|------------------------|
| 2017 Kevin Harris |
| 2018 Meghan LaFountain |
| 2019 Eric Kane |
| 2021 Kapildeo Singh |
| 2022 Shanay Fulton |
| 2023 Meg Bush |
| 2024 Stephanie Fisher |

JUSTIN WILKIE NEXT GENERATION AWARD

| |
|--|
| 2022 Officer Jason Bodell (Middletown Police Department) |
| Audrey Livingston (Loaned Exec. from Middlesex Health) |
| 2023 Barbara Holloman |
| 2024 Peter Keast |
| Lisa Christensen |

LIVE UNITED AWARD

OUR FUNDED PARTNERS



2025-2026 COMMUNITY IMPACT GRANTS

Youth Opportunity

Tri-Town Youth Services Bureau

Oddfellows Playhouse Youth Theater

Police Activity League of Middletown

Northern Middlesex YMCA

Adelbrook

Westbrook Youth & Family Services



Healthy Communities

Women and Families Center

St. Vincent de Paul (Middletown)

Gilead Community Services, Inc.

Middlesex Health

Middletown Pride

Middletown Adult Education



Community Resiliency

Literacy Volunteers Valley Shore

Columbus House

HOPE Partnership

Prevention Fund**



Financial Security

Kuhn Employment Opportunities, Inc.

STEAM Train, Inc.

*Middlesex United Way also supports the state's 2-1-1 and 9-8-8 Helplines through the 2025-2026 Community Impact Grant Cycle.

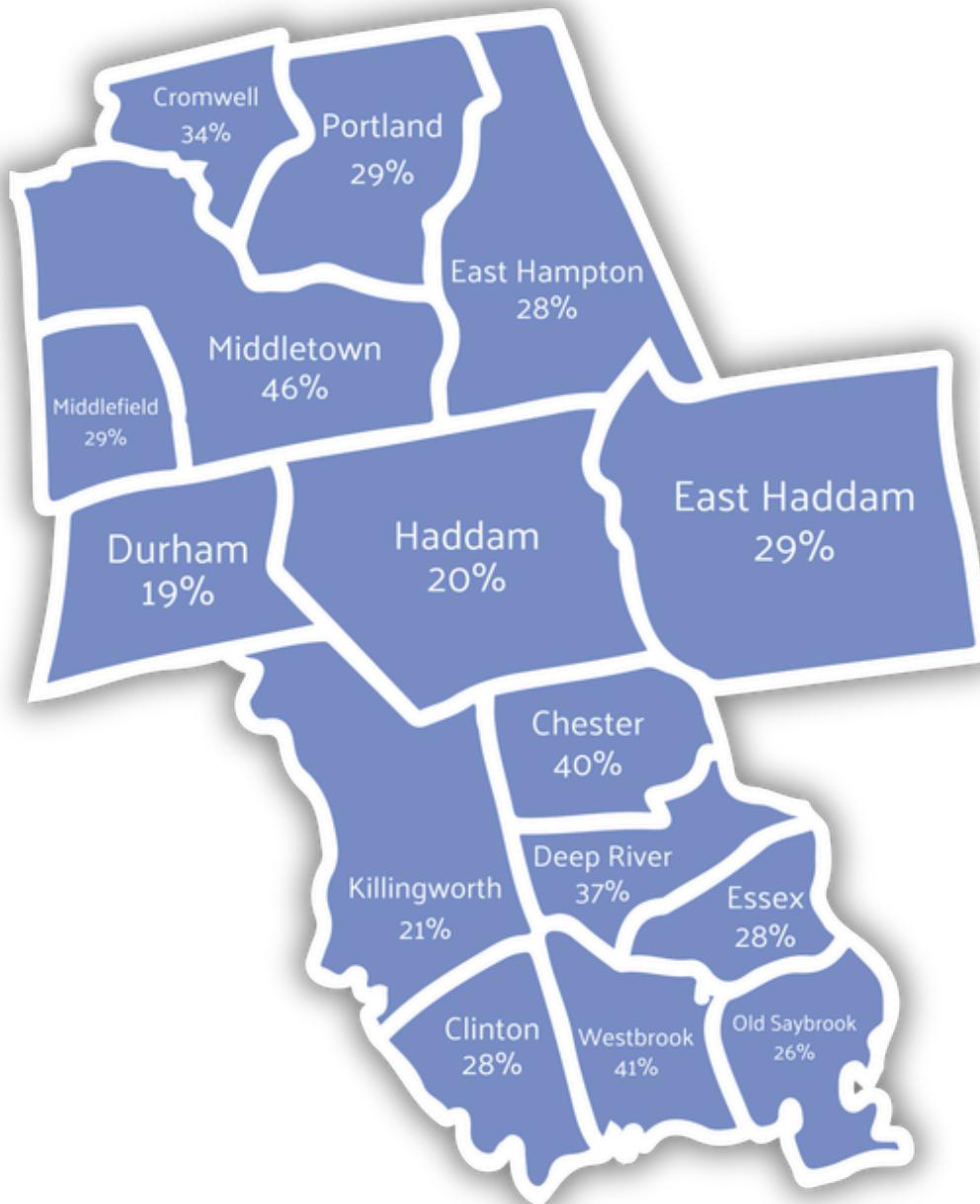
**Middlesex United Way runs the Prevention Fund to assist community members with funding for security deposits, rental assistance, and other general housing needs.

WHAT IS ALICE?

ALICE is an acronym for **A**sset **L**imited, **I**ncome **C**onstrained, **E**mployed – representing the growing number of single adults and families who earn less than the basic cost of living (below the ALICE threshold).



PERCENTAGE OF ALICE HOUSEHOLDS PER MIDDLESEX COUNTY TOWN



SCAN QR CODE TO LEARN MORE ABOUT
THE 2025 CT ALICE REPORT



WHO IS ALICE?

ALICE is all around us! Your friends, neighbors, and even family members could be struggling to make ends meet while working multiple jobs. Every hour of every day, they must choose between keeping food on the table, paying rent, clothing their children or affording the high cost of needed medications.



WHAT IS 211?

2-1-1 is a free, confidential information and referral service that connects people to essential health and human services 24 hours a day, seven days a week online and over the phone. **2-1-1** is a program of United Way of Connecticut and is supported by the State of Connecticut and Middlesex United Way.



THE IMPACT OF 2-1-1

*January 1, 2025 - December 31, 2025



CONNECTICUT

431,774 Total Calls & Requests

Top Requests:

Housing & Shelter: 29.9%

Mental Health & Addiction: 30.1%



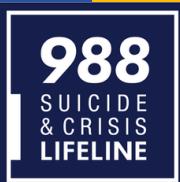
MIDDLESEX COUNTY

12,283 Total Calls & Requests

Top Requests:

Housing & Shelter: 24.0%

Mental Health & Addiction: 34.2%



988 has been designated as the new three-digit dialing code that will route callers to the National Suicide Prevention Lifeline.

When people call, text, or chat 988, they will be connected to trained counselors that are part of the existing Lifeline network. These trained counselors will listen, understand how their problems are affecting them, provide support, and connect them to resources, if necessary.



Spotted in the Society Pages

In a nod to our Bridgerton-themed President's Ball, these photos capture the events, faces, and moments that shaped our year.



LIGHTS, CAMERA...TAKING ACTION!



In 2025, Middlesex United Way expanded its reach through local television, radio, and podcast interviews.

President & CEO Shawonda S. Swain appeared on WTNH's "This Week in Connecticut" with Dennis House to highlight our community impact, while our team also shared our story through the "Birdies for Charity" fundraiser on WFSB. Our team also joined WESU 88.1FM for a radio interview ahead of Wesleyan's employee campaign.

Scan the QR code to watch the segments.



UNITED WAY CONFERENCES

During the summer of 2025, members of the Middlesex United Way team participated in national United Way conferences and advocacy efforts.

Staff attended the United Way "Together We Thrive" Conference in Orlando, connecting with leaders from across the country, and later joined more than 400 United Way leaders in Washington, D.C. to advocate at the Capitol for policies and resources that support our communities and ALICE families.



WOMEN UNITED®



JOIN A MOVEMENT OF WOMEN CREATING REAL CHANGE IN MIDDLESEX COUNTY.

WOMEN UNITED IS A VOLUNTEER-DRIVEN GROUP POWERED BY MIDDLESEX UNITED WAY

Our mission is simple:

- 👉 **EMPOWER** women to make healthy, informed decisions.
- 💰 **IMPACT** financial security through education and resources.
- 👶 **IGNITE** childhood development through family support.



READY TO JOIN US?

Become a member and take part in service projects, community events, and leadership opportunities that truly make a difference. Scan the QR Code to learn more.

POWER OF THE PURSE

At this year's sold-out "Power of the Purse" fundraiser, Middlesex United Way's Women United announced the return of its grant program—awarding \$1,000 to the Middlesex County NAACP to support its WIN Reading Program for Girls. The program helps girls ages 7–11 build literacy skills, confidence, and leadership through mentoring and enrichment sessions.

Women United hosted another grant cycle in the fall of 2025. Grant submissions are in the process of being reviewed now and will be announced in the spring.

Scan the QR Code to Read More about the Grant



*View the Power of the Purse Photo Gallery online:
Middlesexunitedway.org/2025popimages*

WOMEN UNITED



CLOTHING SWAP



Women United volunteers hosted a spring Clothing Swap in partnership with Reboot Eco, bringing community members together around sustainability, connection, and support for women and children across Middlesex County.

EMERGING LEADERS SOCIETY

STUFF-A-CRUISER

HOLIDAY TOY DRIVE

The Emerging Leaders Society's 2025 "Stuff-A-Cruiser" Toy Drive brought together volunteers and community partners to help deliver holiday gifts to approximately 300–400 children in the Middletown community.

The event also strengthened new community connections, including a growing partnership with Middlesex Health and several other local businesses, expanding the reach and impact of ELS efforts.



OUR FINANCIALS*

2024-2025 TOTALS

Middlesex United Way takes its responsibility as a steward of donor contributions very seriously. United Way's Board of Directors, staff, and other professional volunteers with expertise in financial management and governance have established fiscal controls to ensure the highest level of accountability and transparency in United Way's operations.

| | Without Donor Restrictions | With Donor Restrictions | Total |
|---|-------------------------------|----------------------------|---------------------|
| REVENUE AND SUPPORT: | | | |
| Current-year campaign contributions: | | | |
| Total amounts raised | \$ 630,504 | \$ - | \$ 630,504 |
| Less: amounts raised on behalf of others | (54,664) | | (54,664) |
| Total contributions | 575,840 | | 575,840 |
| Contributed services | | | |
| Less: provision for uncollectible pledges | (45,941) | | (45,941) |
| Prior year campaign contributions | 78,513 | | 78,513 |
| Net campaign revenue | 608,412 | | 608,412 |
| Other revenue and support | | | |
| Employee retention credit | 212,970 | | 212,970 |
| Service fee revenue | 1,368 | | 1,368 |
| Other contributions | 71,005 | 2,949 | 73,954 |
| Other income | 54,829 | | 54,829 |
| Net assets relieved from restriction | 24,111 | (24,111) | - |
| Total other revenue and support | 364,283 | (21,162) | 343,121 |
| Total revenue and support | 972,695 | (21,162) | 951,533 |
| DISTRIBUTIONS AND EXPENSES: | | | |
| Contributions: | | | |
| Community partners | 300,000 | | 300,000 |
| Special allocations and other distributions | 15,700 | | 15,700 |
| Payments to affiliated organizations | 2,301 | | 2,301 |
| Total contributions | 318,001 | | 318,001 |
| Expenses: | | | |
| Program services | 263,333 | | 263,333 |
| Support services: | | | |
| Fundraising expenses | 229,570 | | 229,570 |
| Management and general expenses | 182,306 | | 182,306 |
| Total program and support services | 675,209 | | 675,209 |
| Total distributions and expenses | 993,210 | | 993,210 |
| CHANGE IN NET ASSETS FROM OPERATIONS | (20,515) | (21,162) | (41,677) |
| INVESTMENT INCOME: | | | |
| Net investment income | 32,011 | | 32,011 |
| Investment income - beneficial trusts | 27,015 | | 27,015 |
| Net increase (decrease) in trust values | | 45,892 | 45,892 |
| Net realized and unrealized gains and (losses) on investments | 30,322 | 21,338 | 51,660 |
| Total investment income | 89,348 | 67,230 | 156,578 |
| CHANGE IN NET ASSETS | 68,833 | 46,068 | 114,901 |
| NET ASSETS: | | | |
| Beginning of year | 590,295 | 909,731 | 1,500,026 |
| End of year | \$ 659,128 | \$ 955,799 | \$ 1,614,927 |

***Editor's Note:** The financial information provided in this Annual Report is not yet audited at the time of publication. We will provide a copy of the complete audited financials once finalized on our website: Middlesexunitedway.org.

OUR CORPORATE SPONSORS

2025-2026*

Our corporate sponsors generously support their community through a single donation that helps Middlesex United Way's marketing programs, special events, and materials.
*Corporate Sponsors at or above \$1,000 level as of January 1, 2026 are listed below.

EVERSOURCE

 LIBERTY
BANK
Be Community Kind.™

 COMCAST

 Ameriprise
Financial

Mc Cabe & Associates
A private wealth advisory practice of
Ameriprise Financial Services, LLC

 Middlesex
Health

 RAM
RADIOLoGY

 David Alan
HOSPITALITY GROUP

 Harding Development Group
Harding Commercial Real Estate

 Ascend
BANK

 ubeo
B U S I N E S S
S E R V I C E S

Equal Housing Lender © Member FDIC

MIDDLESEX UNITED WAY STAFF

Shawonda S. Swain, President & CEO

Audrey Livingston, Loaned Executive, Middlesex Health

William Hall, Director of Communications & Marketing

Karen Renner, Administrative & Finance Assistant

Whitney Mooney, Director of Development

Desmond Mahario, Vice President of Finance & Administration

Brian Thompson, Director of Community Impact





Middlesex
UNITED WAY

CELEBRATING 90+ YEARS

1935
MIDDLETOWN COMMUNITY CHEST INCORPORATED

1952
EXPANDED TO GREATER MIDDLETOWN
COMMUNITY CHEST

1956
COMMUNITY CHEST BECOMES UNITED FUND

1967
EXPANDED TO NORTHERN MIDDLESEX UNITED FUND

1970
UNITED FUND BECOMES MIDDLESEX UNITED WAY

1987
UNITED WAY OF AMERICA CELEBRATES 100 YEARS

2009
UNITED WAY OF AMERICA BECOMES UNITED
WAY WORLDWIDE



SCAN QR CODE TO LEARN MORE ABOUT
MIDDLESEX UNITED WAY'S HISTORY