



# ANNUAL REPORT

2022-2023

## OUR MISSION

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Ignite the desire in everyone to improve lives by mobilizing our community for lasting social change

## OUR VISION

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To build a strong, caring community where everyone has the opportunity to live a good life

## OUR VALUES

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- Demonstrate trust, integrity, respect, inclusivity & transparency
- Energize and inspire volunteerism and volunteer leadership
- Endorse innovation, partnerships and collective action
- Provide non-partisan leadership
- Embrace diversity



# PRIORITY ACTIONS



Establish UWR as a partner of choice by developing strong relationships with donors and key partners to support engagement, continued growth, and retention.



Provide an accessible solution for families to find the services they need and to identify critical community service gaps.



Improve grade-level reading among young readers in disadvantaged communities.



Position United Way Regina for the future by preparing for digital transformation.



Build an engaged, diverse, inclusive, and equitable team of staff and volunteers that reflect our communities and demonstrate an understanding of their perspectives.



Be a leader of change for Truth & Reconciliation in our community.

## Our Commitment to Diversity, Equity, and Inclusion

United Way Centraide Canada (UWCC) is committed to building a more equitable future and to our vision of a country where everyone in every community has the opportunity to reach their full potential.

We will do this by:

- Ensuring our people, the work we do, and how we do it reflects the diversity of our communities
- Continuously learning and unlearning as individuals and organizations
- Amplifying the voices of underrepresented people and co-creating equitable solutions
- Working to dismantle discriminatory structures and systems within our movement and advocate for systemic change to build an inclusive Canada

We will demonstrate our commitment to this journey by creating and implementing a DEI strategy that is integrated into our strategic plan, and by committing resources to it.

## Our Commitment to Reconciliation between Indigenous and Non-Indigenous Peoples

United Way Centraide Canada is committed to reconciliation with Indigenous Peoples. As a national charity with deep local impact, we view reconciliation as an opportunity to honour Indigenous Peoples across this land and elevate our commitment to them.

We will do this by:

- Listening to and learning from Indigenous members of our communities about Indigenous strengths and ways of knowing and being;
- Reflecting on the relationship that we have had with Indigenous Peoples;
- Collaborating with Indigenous communities and organizations whose objectives or work intersect with ours; and
- Embracing Indigenous voices, leadership, and participation in all aspects of our organization and the United Way Centraide Movement

We will demonstrate our commitment to this journey by creating an Indigenous engagement strategy that is grounded in our relationships with Indigenous communities and integrated into our strategic plan, and by committing resources to it.

# A MESSAGE FROM THE CEO

I am pleased to present the annual report for United Way, a year that truly exemplifies our collective commitment to making a lasting impact on our communities. On behalf of the Board of Directors and the staff team, I am honored to share the remarkable achievements, partnerships, and milestones that have shaped our journey over the past year.

In a world that continues to grapple with uncertainty, the resilience and generosity of our community members have been the guiding lights that inspire us to strive for a better tomorrow. We firmly believe that when we unite for a common cause, we can achieve remarkable outcomes.

Our core mission to “ignite the desire in everyone and improve lives by mobilizing our community for lasting social change, still remains the driving force behind our actions. Over the past year, we continue to strive towards achieving this mission through our priority actions.

The heart of United Way Regina is the unity and collaboration of individuals, organizations, and communities that make it all possible. Through strategic partnerships, community engagement, and a focus on measurable outcomes, United Way Regina has made a significant impact on countless lives. The collaborative approach ensures that resources are directed where they are needed most, creating lasting change.

We would like to extend our deepest gratitude to our donors, volunteers, partners, and staff for their relentless dedication. Your unwavering support has been instrumental in our success, and we look forward to your continued partnership in the future.

As we look ahead, we remain committed to our vision “to build a strong, caring community where everyone has the opportunity to live a good life.”

United Way Regina remains committed in our efforts to innovate ways we can collectively strengthen communities and empower those who need it most.

Together, we can create a brighter future.



**ROBYN EDWARDS-BENTZ**

CEO

# OUR TEAM

2022-2023

## BOARD OF DIRECTORS

### Board Chair

Pamela Fiske

### Vice Chair

Garion Carlson

### Past Chair

Darren McKee

### Directors

Kristél Kriel

Jim Engel

Shaadie Musleh

Chad Hilton

Karen Mercier

Lindsay Manko-Bauche

Lorilee Davies

Amy McGregor

Marg Romanow

### Governance Committee

Garion Carlson (Chair)

Kristél Kriel, Shaadie Musleh,

Jim Engel

### Audit Committee

Karthik Malladi (Chair)

Chad Hilton, Marg Romanow,

Amy McGregor

### Non-Board Committee

#### Members- Audit Committee

Lorna Hamilton

A special thank you to Lorna for volunteering their time and expertise to the Audit Committee this past year.

## STAFF

Robyn Edwards-Bentz

CEO

Tanya Murray

Director, Operations

Todd Sandin

Director, Marketing & Engagement

Kristin Nelson

Director, 211 Saskatchewan

Trish Dupuis

Director of Development

Alison Jestadt

Manager 211 Saskatchewan

Charlotte Mutschall

CI Administrative Assistant

Clairice Tuckanow

CBYF Youth Engagement Coordinator

Darcy Romanow

Finance Administrative Technician 3

Joan Barton

Development Assistant

Joanne Ell

Donor Relations Manager

Joylyn Sripathi

211 Saskatchewan Resource Specialist

Kayla Watson-McNab

CBYF Project Lead

Kristin Gushuliak

Community Grant Manager

Lois Martinson

211 Saskatchewan Resource Specialist

Sabrina Trombley

Donor Relations Manager

Sandi White

Family Literacy Hub Coordinator

Tamana Hashimi

Marketing & Communications Coordinator

Tamara Armbruster

Engagement Manager

# AUDIT COMMITTEE REPORT

In 2023, United Way Regina continued its future-forward focus on the ongoing need for continuous innovation, enhanced business processes, community investments, and an elevated volunteer and donor experience. While doing so, the organization also stepped up as a partner to manage and distribute funds on behalf of the Government of Canada's Community Services Recovery Fund (CSRF) for southern Saskatchewan, aiming to respond to the adaptation and modernization needs of charities and non-profits facing immediate and long-term impacts of the COVID-19 pandemic.

Financially, total revenues for the 2023 fiscal year for the primary Operating Fund were \$3.65 million (with an additional \$1.58 million of Community Services Recovery Fund revenue), compared to \$3.99 million in 2022. This displays our partners and donors ongoing commitment to show their local love, while also reflecting challenges faced by many donors and businesses due to continued inflation resulting in reduction of disposable income. Continued strategic and thoughtful spending resulted in the organization realizing a budgeted deficit to the Operating Fund of \$817,643 signaling a focus on ensuring that consistent levels of investments in the community continued during uncertain times, while also preparing for the future.

Notable Community Impact investments for 2023 included over \$1.08 million to funded partners, \$183,776 to donations designated to other charities/agencies, and \$542,471 to 211 Saskatchewan. In addition, United Way Regina distributed \$1.53 million of Community Services Recovery Fund grants on behalf of the Government of Canada. An additional \$2 million was invested in various Community Impact initiatives, both in staffing and programming expenses, to support signature initiatives related to improving third grade reading outcomes such as Summer Success and Campaign to Grade Level Reading, Community Building Youth Futures program, as well for volunteer engagement, DEI strategy advancement, and non-profit sector support and assessment. Total Community Impact expenses for the 2023 fiscal year amounted to \$5.4 million, supporting a variety of targeted community initiatives with a mandate to mobilize collective action in United Way's three key focus areas.

Total net assets at June 30, 2023 were \$4.15 million, as compared to \$4.92 million during prior year, mirroring the budgeted deficit for the year. During the year, the organization maintained its overarching benchmarks established in the Investment Policy, as well as the minimum and maximum internally restricted reserves set forth in the Governance Policies. These outcomes signal considerable financial strength and adherence to risk-management guidelines.

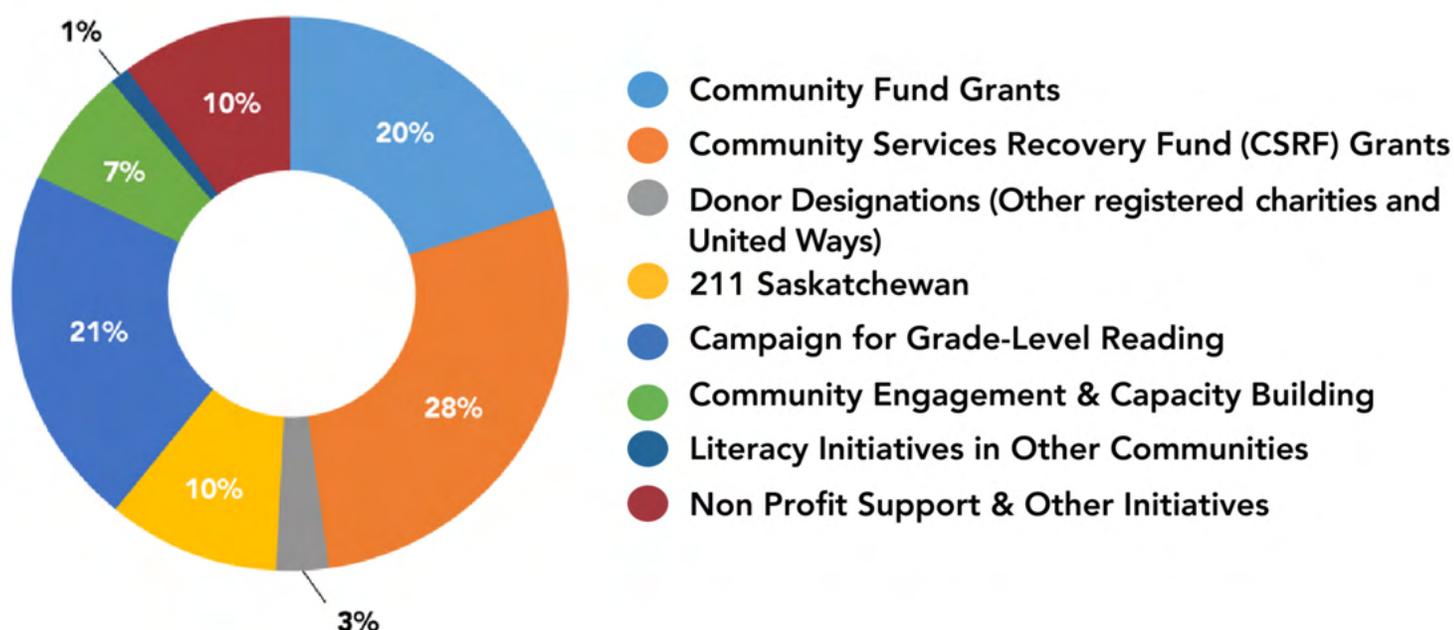
# AUDIT COMMITTEE REPORT

As part of its mandate, the Audit Committee for United Way Regina conducted a full review of the 2023 Financial Statements, along with the controls over accounting and financial reporting, in consultation with Virtus Group LLP. The Committee is satisfied with the results of the audit review, inclusive of an in-camera session with the auditors, and can assure all United Way Regina stakeholders that its resources are being managed both appropriately and effectively.

On behalf of the Board of Directors, it is my pleasure to present the United Way Regina's Summary Financial Statements report for the fiscal year ended June 30, 2023.

**Report submitted by Karthik Malladi,  
Committee Chair on behalf of the Audit Committee**

## How gifts were invested





## **INDEPENDENT AUDITORS' REPORT ON SUMMARY FINANCIAL STATEMENTS**

**To the Members  
United Way of Regina**

### *Opinion*

The summary financial statements, which comprise the summary statement of financial position as at June 30, 2023 and the summary statement of operations for the year then ended, are derived from the audited financial statements of United Way of Regina for the year ended June 30, 2023.

In our opinion, the accompanying summary financial statements are a fair summary of the audited financial statements, which were prepared in accordance with Canadian accounting standards for not-for-profit organizations.

### *Summary Financial Statements*

The summary financial statements do not contain all the disclosures required by Canadian accounting standards for not-for-profit organizations. Reading the summary financial statements and the auditors' report thereon, therefore, is not a substitute for reading the audited financial statements and the auditors' report thereon.

### *The Audited Financial Statements and Our Report Thereon*

We expressed an unmodified audit opinion on the audited financial statements in our report dated September 26, 2023.

### *Management's Responsibility for the Summary Financial Statements*

Management is responsible for the preparation of the summary financial statements based on the audited financial statements prepared in accordance with Canadian accounting standards for not-for-profit organizations.

### *Auditors' Responsibility*

Our responsibility is to express an opinion on whether the summary financial statements are a fair summary of the audited financial statements based on our procedures, which were conducted in accordance with Canadian Auditing Standard (CAS) 810, *Engagements to report on Summary Financial Statements*.

**September 26, 2023  
Regina, Saskatchewan**

**VIRTUS GROUP LLP**  
**Chartered Professional Accountants**

**United Way of Regina**

**SUMMARY STATEMENT OF FINANCIAL POSITION**

As at June 30, 2023

(with comparative figures as at June 30, 2022)

	Operating Fund	Tomorrow Fund	Total 2023	Total 2022
<b>Assets</b>				
Cash and short term investments	\$ 1,986,013	\$ -	\$ 1,986,013	\$ 2,534,209
Pledges receivable	339,606	-	339,606	563,658
Accounts receivable and prepaid expenses	27,018	-	27,018	88,556
Investments	1,251,469	1,210,367	2,461,836	2,600,835
Tangible capital assets	47,963	-	47,963	89,851
<b>Total Assets</b>	<b>\$ 3,652,069</b>	<b>\$ 1,210,367</b>	<b>\$ 4,862,436</b>	<b>\$ 5,877,109</b>
<b>Liabilities</b>				
Accounts payable and donor directed payable	\$ 75,941	\$ -	\$ 75,941	\$ 70,147
Funds held in trust	211,632	-	211,632	407,127
Deferred contributions	429,765	-	429,765	481,232
	717,338	-	717,338	958,506
<b>Net Assets</b>	<b>2,934,731</b>	<b>1,210,367</b>	<b>4,145,098</b>	<b>4,918,603</b>
<b>Total Liabilities and Net Assets</b>	<b>\$ 3,652,069</b>	<b>\$ 1,210,367</b>	<b>\$ 4,862,436</b>	<b>\$ 5,877,109</b>

**SUMMARY STATEMENT OF OPERATIONS**

Year ended June 30, 2023

(with comparative figures for the year ended June 30, 2022)

	Operating Fund	Tomorrow Fund	Total 2023	Total 2022
<b>Revenue</b>				
Net campaign revenue	\$ 2,379,091	\$ -	\$ 2,379,091	\$ 2,740,019
Contributions and grants	1,185,710	-	1,185,710	1,191,316
Community Services Recovery Fund	1,578,277	-	1,578,277	-
Investment and other income	84,211	44,138	128,349	96,614
	5,227,289	44,138	5,271,427	4,027,949
<b>Expenses</b>				
Fundraising expenses	631,674	-	631,674	633,171
Net revenue available for Community Impact	4,595,615	44,138	4,639,753	3,394,778
<b>Community Impact expenses</b>				
Funded partner and COVID-19 investments	1,077,850	-	1,077,850	1,301,933
Community Services Recovery Fund grants	1,531,773	-	1,531,773	-
Donor-directed to other charities	183,776	-	183,776	250,209
Other community impact investments	2,585,571	-	2,585,571	2,048,239
United Way of Canada dues	34,288	-	34,288	35,117
	5,413,258	-	5,413,258	3,635,498
<b>Excess (deficiency) of revenue over expenses</b>	<b>\$ (817,643)</b>	<b>\$ 44,138</b>	<b>\$ (773,505)</b>	<b>\$ (240,720)</b>

The summary financial statements are derived from the audited financial statements, prepared in accordance with Canadian accounting standards for not-for-profit organizations, as at June 30, 2023 and for the period then ended. The preparation of these summary financial statements requires management to determine the information that needs to be reflected in them so that they are consistent in all material respects with, or represent a fair summary of, the audited financial statements. Management prepared these summary financial statements ensuring the information agrees with the related information in the audited financial statements, major subtotals, totals and comparative information agrees with the audited financial statements and information in the audited financial statements dealing with matters having a pervasive or significant effect are contained in the summary financial statements. A copy of the complete audited financial statements are available on our website at [www.unitedwayregina.ca](http://www.unitedwayregina.ca).

# GOVERNANCE COMMITTEE REPORT

United Way Regina's Board has the principal duties to set the strategic direction, measure progress on priorities, ensure the organization has enough resources to fulfill its mission, understand and mitigate risks, provide effective financial stewardship and governance. The Board assigns some of its duties to Committees of the Board, such as the Governance Committee.

The Governance Committee has the responsibility to oversee the process for recruiting and nominating individuals who wish to stand for election as Directors and Officers. The slate of nominees and table officers are presented to the general membership for election at the Annual General Meeting.

The Governance Committee recommends the following candidates for re-election to the United Way Regina Board of Directors: Pamela Fiske, Garion Carlson, Shaadie Musleh, Karthik Malladi, Amy McGregor, Karen Mercier, Kristél Kriel, Marg Romanow, Jim Engel, Lorilee Davies, Chad Hilton and Lindsay Manko-Bauche.

Since 1988, United Way and the Canadian Labour Congress have been partnered in communities across Canada, ensuring workers and working families can access social and public services. Unions across Saskatchewan are generous supporters of United Ways in our province, encouraging their members to volunteer and give to community. The partnership goes far beyond financial support and includes volunteering such as dedicating time, expertise and leadership on the United Way Board of Directors.



# GOVERNANCE COMMITTEE REPORT

The Governance Committee is pleased to recommend the following new candidate for a 2-year term as the Labour Representative for the United Way Regina Board: Ashlee Hicks. Ashlee is a Canadian Labour Congress Prairie Regional Representative for Saskatchewan.

The Governance Committee proposes the following Slate of Table Officers for 2023-2024 to the general membership, including:

**Board Chair**  
Garion Carlson

**Past Chair**  
Pamela Fiske

**Vice Chair & Governance Chair**  
Shaadie Musleh

**Audit Chair**  
Karthik Malladi

This year, there is one Director who has reached the end of their third 3-year term, serving an incredible nine years. We would like to thank Darren McKee for his tireless service to the community. Over the years, Darren has demonstrated great humility in leadership, sharing many valuable lessons with his peers and staff, encouraging others to listen and learn from the individuals we aim to serve. Not only has he guided United Way Regina along the path to advancing our commitment to diversity, equity and inclusion & Indigenous collaboration, but he also contributed to national efforts by serving on the first National Indigenous Relationships and Reconciliation Committee as well. We wish you well in all your future endeavours.

**Report submitted by Garion Carlson, Committee Chair on behalf of the Governance Committee**





# THANK YOU FOR SHOWING YOUR LOCAL LOVE

1440 Scarth Street, Regina, SK., S4R 2E9  
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**United Way**  
Regina

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