

UNITED WAY FOUNDATION OF THE CAPITAL REGION

HELPING FAMILIES THRIVE
TODAY AND TOMORROW

ANNUAL REPORT 2024-2025



UNITED WAY
Capital Region

**UNITED WAY FOUNDATION
OF THE CAPITAL REGION**

A MESSAGE FROM OUR FOUNDATION LEADER



United Way Foundation of the Capital Region 2024-2025 Board of Directors

Katie Clarke, LeTort Trust - Chair
Joseph Capita, Community
Volunteer - Secretary/Treasurer
Greg Gunn, Gunn-Mowery, LLC
Susan Hubley, Community
Volunteer
Tara Mashack-Behney, Conrad
Siegel
Jonathan Vipond, Community
Volunteer

For three decades, United Way Foundation of the Capital Region has worked to help families in Cumberland, Dauphin and Perry counties thrive. We proudly share this report with you to highlight our work in 2024-2025.

Since its inception in 1996, the Foundation has seen tremendous growth thanks to the generous support of caring individuals, families and organizations who believe United Way is – and will always be – uniquely positioned to make our community a vibrant place to live. Support from the Foundation has helped United Way of the Capital Region lead our community through natural disasters and the Great Recession while continuously implementing innovative ways to better serve our community.

None of work could be done without the leadership and dedication of our donors and volunteers who share their time, talent and treasure with us. Their tireless dedication inspires us to do more and be better every year. We cannot thank you enough.

Thank you for your support. United is the Way.

A handwritten signature in black ink that reads "Katie Clarke".

Katie Clarke

2024-2025 Chair

United Way Foundation of the Capital Region

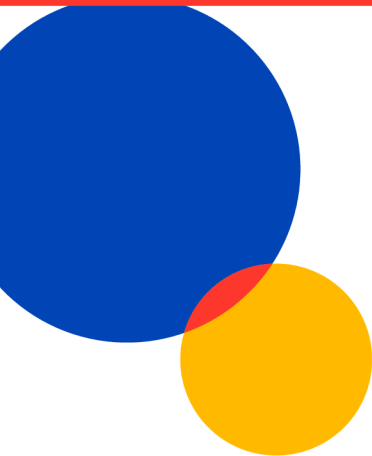
United Way of the Capital Region Executive Committee (Members of the Corporation)

Kathleen McKenzie, Highmark Blue Shield - Chair
Brian Jackson, McNees Wallace & Nurick LLC - Chair Elect
Jennifer Esser, KPMG - Secretary/Treasurer
Chris Davis, Delta Dental of PA - Vice Chair, Resource
Development
Dolly Lalvani, PwC US Tax LLP - Vice Chair, Governance
Michael Hussey, Widener University Commonwealth Law
School - Vice Chair, Community Impact
John Campbell, Community Volunteer
Jodie Daubert, AAA Central Penn
David Del Grosso, PNC
Dr. Bolanle Limann, Community Volunteer

United Way of the Capital Region Investment Committee

Tara Mashack-Behney, Conrad Siegel -
Chair
Chris Cassel, Apollon Wealth Management
Central PA Member
Jennifer Collins, River Wealth Advisors
Brad Newman, Focus Partners Wealth
Mark Roda, Clear Wealth Partners

UNITED WAY FOUNDATION OF THE CAPITAL REGION PURPOSE



The United Way Foundation of the Capital Region was created in 1996 to help ensure services will be available in our community when they are needed most, and provide donors a vehicle to create a lasting legacy. Gifts come from caring people through their wills and other planned giving vehicles. These gifts help provide a stable base of funding during challenging economic times, as well as, meet needs as they change over time.

FOUNDATION FUNDS

Unrestricted

The General Fund - An unrestricted fund for the Foundation to support the most pressing and emerging needs identified in the community. This fund provides flexibility for the Foundation Board to address a current need or support more than one priority of the local United Way.

Restricted Funds

- The Operating Fund - A restricted fund that can only be used to support the day-to-day operations of United Way. The earnings of this fund help cover the operational costs of United Way so more dollars can go to program services. The annual earnings of this fund are transferred to United Way.
- The Legacy Fund - A temporarily restricted fund where the gift is large enough for the earnings to support the donor's annual gift to United Way's campaign. At the donor's death, the funds are transferred into the Foundation's General Fund. The annual earnings of this fund are transferred to United Way.
- Restricted Named Funds - Funds created by a donor for specific United Way purposes.
 - Sinon Family Fund: The annual earnings from this fund are transferred to United Way for its Board of Directors to decide how best to distribute the funds.
 - Richard & Marian Spong Fund: The distribution of annual earnings from this fund are decided by United Way Foundation of the Capital Region's Board of Directors.
 - James E. Jones Fund: The distribution of annual earnings from this fund are transferred to United Way for its Board of Directors to decide how best to distribute the funds for programs benefiting children and youth.

Recognition of Gift Received 2024-2025 (Gifts \$10,000 or more)

- Steven Hoffman - \$10,000

JOHN HARRIS LEGACY SOCIETY

The John Harris Legacy Society of United Way Foundation of the Capital Region recognizes and shows appreciation to the generous individuals and families who have made current or planned gifts, whether directly or indirectly, of \$5,000 or more to build the endowment of our local United Way. These individuals have invested in the future of our community and have created a permanent memorial to their thoughtfulness and generosity. When you become a member of the John Harris Legacy Society, you create a legacy of caring for the Capital Region that continues for years into the future.

CATEGORY KEY

Diamond Level:	\$500,000 +
Emerald Level:	\$250,000 - \$499,000
Ruby Level:	\$100,000 - \$249,999
Pearl Level:	\$50,000 - \$99,999
Opal Level:	\$25,000 - \$49,999
Sapphire Level:	\$5,000 - \$24,999

**Gifts established prior to 1/1/06
and less than \$5,000 are not
listed in this publication.**

GIFTS RECEIVED

DIAMOND LEVEL

Ross & Sarah Rhoads Foundation
Estate of Frank A. Sinon
Estate of Richard M. Spong

EMERALD LEVEL

Harry Alwine Residuary Trust
In honor of Joseph M. Capita
Mr. & Mrs. William J. Hudson
George W. Kehr Trust

RUBY LEVEL

Estate of Fay S. Fry
Robert D. & Barbara E. Hanson
Steven Hoffman
Mrs. & Mrs. James Marley
Belle F. & Fritz C. Nelson
Shannon Reed
David & Donna Schankweiler
David E. Tracy Trust

PEARL LEVEL

John M. ("Mac") & Shirley J. Aichele
Paul B. Beers
Estate of Gladys Mohn Bowman
Michael J. Breslin
Kate F. Gorgas Trust
James E. Jones Trust

OPAL LEVEL

Beryl & Bowman Brown Fund
James B. Garofola
John C. & Elizabeth C. Kunkel
Harry B. & Margaret Ogilvie McCormick
Earl L. & S. Christine Mummert
Jacob Schnader
Anna M. Siebert Trust

SAPPHIRE LEVEL

Madeline M. & Joseph S. Capita
J. Douglass Berry
William E.C. & Mary Dearden
David B. Disney
Winnie E. Fackler
Sidney E. Friedman
Harrisburg Glass Foundation
Highmark Health
Dr. & Mrs. Abram M. Hostetter
Bernard Kelly
Samuel Kunkel Estate
Mary Louise McDowell
Christine & Ivan Sears
Margaretta A. Shanaman
Jessie E. Smith
Richard V. Snyder
Charles L. Stoup Fund
Charles Wilson Estate
Carole Yon & Donald Coffee

LETTERS OF INTENT

Rosalie E. & Kenneth L. Bowers
Joseph M. Capita
Jewel Cooper & Woody Shaull
Robert J. Dolan
Benjamin C. Dunlap, Jr.
Frieda J. & Raymond L. Gover
John M. Hubley
Gary J. & Lois Breon Imblum
Deborah B. & James A. Keys
Albert W. Kieres, Jr.
Sally S. Klein
John & Elma Longnaker
Harold A. McInnes
Jessica E. Meyers
Sondra S. Osler
Sallie & Shel Parker
David Skerpon
David W. Sweet
Five Anonymous Donors

2024-2025 GRANTS DISTRIBUTED

United Way Conferences - \$5,525

United Way Foundation of the Capital Region supported staff attendance and participation in local, regional and national conferences. Three senior leadership team attended a United Way Worldwide conference, four staff members attended a United Way of Pennsylvania conference, and 20 staff members participated in a regional conference.

Professional Development - \$2,350

One staff member participated in M&T Bank's NextUp leadership program, one staff participated in Leadership Harrisburg's Community Leadership Series, and one staff member attended the PA Workforce Development Association's Annual Conference to enhance management and leadership abilities and grow their professional network.

United Way Brand Refresh - \$18,759

United Way began implementation of the brand refresh by updating United Way's website, online database templates, event signage, and promotional merchandise.

Major Gifts Officer - \$81,000

United Way hired an additional major gifts officer to help the organization raise more funds to support its work.

Tocqueville Society Donor Portal - \$6,275

Funded the creation of a portal to enhance the donor experience for United Way's Tocqueville Society members.

TOTAL DISTRIBUTION - \$113,909

CONSOLIDATED FINANCIAL STATEMENTS

Statement of Financial Position for the year ended 6/30/25

ASSETS	
Cash & Cash Equivalents	\$319,737
Investments	\$6,970,084
Pledges Receivable Less Allowance for Uncollectible Pledges of \$273,084	\$0
Other Receivables	\$16,828
Cash Surrender Value of Life Insurance Policies	\$71,053
Land, Building & Equipment Net	\$0
TOTAL ASSETS	\$7,377,702
LIABILITIES	
Short-term Payables	\$0
Grants & Allocations Payable	\$0
Designations to Agencies & Other United Ways	\$0
Processed Pledges Payable	\$0
Capital Lease Obligation	\$0
TOTAL LIABILITIES	\$720
NET ASSETS	
Unrestricted	\$2,076,164
Temporarily Restricted	\$0
Permanently Restricted	\$5,301,538
TOTAL NET ASSETS	\$7,377,702
TOTAL LIABILITIES & NET ASSETS	\$7,377,702

Statement of Activity for the year ended 6/30/25

PUBLIC SUPPORT	
Contributions, Foundations & Trusts	\$27,164
Bequest and other contributions	\$0
Grants	\$0
Donated Goods & Advertising	\$0
Investment Income	\$153,080
Miscellaneous Income	\$0
Realized Gain (Loss) on Investments	\$120,543
TOTAL REVENUE & PUBLIC SUPPORT	\$300,787
DISTRIBUTIONS & EXPENSES	
Grants to Agencies	\$0
Community Grants	\$0
Donated Goods Allocated to Agencies	\$0
Program Services	\$308,059
Fundraising	\$0
Organizational Administration	\$30,200
TOTAL EXPENSES	\$338,259
REVENUE IN EXCESS OF EXPENSES	\$304,575
Unrealized Gain(Loss) on Investments	\$342,047
CHANGE IN NET ASSETS	\$334,250
NET ASSETS BEGINNING OF YEAR	\$7,043,452
NET ASSETS END OF YEAR	\$7,377,702

MAKING AN IMPACT

GRANTS & DISTRIBUTIONS AS OF JUNE 30, 2025

Foundation grants to support special projects	\$113,909
Legacy fund distribution to support annual campaign	\$13,688
Distribution of restricted funds to reduce administrative expenses	\$188,420
TOTAL GRANTS/DISTRIBUTIONS	\$316,017
Investment management fees	\$30,200
Legal fees	
TOTAL ADMINISTRATIVE COSTS	\$30,200