THANK YOU

The United Way of Carlsbad & South Eddy County (UWCSEC) would like to thank you for taking a moment to read the 2012 United Way Annual Report.

We have included individual names of our volunteer leadership who have made these achievements possible. Also included in the report are the 2012 Summary of Income & Expense and highlights for the past year.

A more detailed picture of how our community found the courage to LIVE UNITED this year can be viewed at unitedwayofcarlsbad.org

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Mission

Be the steward of a voluntary process that identifies health and human service needs and responsibly applies financial and human resources to impact those needs.
# Summary of Income and Expense

September 1, 2011 through August 31, 2012

## Support & Income

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contributions</td>
<td>$753,254.00</td>
</tr>
<tr>
<td>Other Income</td>
<td>$10,457.00</td>
</tr>
<tr>
<td>Investment Income</td>
<td>$1,984.00</td>
</tr>
<tr>
<td><strong>Total Support</strong></td>
<td><strong>$765,695.00</strong></td>
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</tbody>
</table>

## Expenses

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Program services</td>
<td></td>
</tr>
<tr>
<td>Allocations &amp; Distributions</td>
<td>$605,445.00</td>
</tr>
<tr>
<td>Supporting Services</td>
<td></td>
</tr>
<tr>
<td>Management &amp; General</td>
<td>$48,396.00</td>
</tr>
<tr>
<td>Fundraising</td>
<td>$34,567.00</td>
</tr>
<tr>
<td><strong>Total Expenses</strong></td>
<td><strong>$688,408.00</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Change in Net Assets</td>
<td>$77,287.00</td>
</tr>
<tr>
<td>Net Assets at Beginning of Year</td>
<td>$567,317.00</td>
</tr>
<tr>
<td><strong>Net Assets at End of Year</strong></td>
<td><strong>$644,604.00</strong></td>
</tr>
</tbody>
</table>

*United Way of Carlsbad & South Eddy County, by policy, maintains 4 reserve funds: 6 mos. agency allocations, 6 mos. operating reserve, emergency building reserve fund, capital improvement fund.*
2012 Volenteer Leadership

Governance

Governance is provided by an active Board of Directors, including a six-member Executive Committee, and is comprised of local volunteers. These volunteers are responsible for setting policies, budget, and overseeing the direction of the UWCSEC. The 2012 Board Chairperson is Erica Ellis, an attorney with Ellis Law Firm.

UWCSEC governance structure is focused on leadership, accountability, and transparency. Board members must possess the following key attributes: a passion for United Way’s mission and vision, a commitment to invest time as an active member, an ability and desire to take a system-wide perspective, and a demonstrated commitment to his/her community. Our Board is comprised of diverse volunteers who are representative of donors (large and small), corporations and sponsors, civic leaders, and other stakeholders.

Executive Committee

Board Chairperson: Erica Ellis, Ellis Law Firm
Incoming Chairperson: Lori Elyasevich, Home Care Connection
Secretary: Kirstin Carlson, UWCSEC
Treasurer: Kathi Smith, Carlsbad National Bank
Member at Large: Wendy Stanley, Carlsbad Medical Center
Past Chairman: Jon Tully, City of Carlsbad

Board of Directors

Aaron Jones, Print by Design
Alan Duncan, Carlsbad Medical Center
Bob Cullum, Nuclear Waste Partnership LLC
Cathy Goad, Intrepid Potash, Carlsbad
Erica Ellis, Ellis Law Firm
Felicia Hill, CMO Services
Fran McCarthy, Carlsbad Municipal Schools
Jim Grantner, Retired City of Carlsbad
Jon Tully, City of Carlsbad
Kathi Smith, Carlsbad National Bank
Kyle Marksteiner, Ad Venture Marketing
Lori Elyasevich, Home Care Connection
Michael Stanley, Mosaic Potash, Carlsbad
Scott Goodale, Mosaic Potash, Carlsbad
Shane Hendrickson, Nuclear Waste Partnership LLC
Tonk Chester, Mosaic Potash, Carlsbad
Wendy Stanley, Carlsbad Medical Center
UNITED WAY OF CARLSBAD
& SOUTH EDDY COUNTY

THANK YOU
FOR GIVING. FOR ADVOCATING. FOR VOLUNTEERING.

Finance & Allocation Committee
Chair: Kathi Smith, Carlsbad National Bank
Members: Jon Tully, Erica Ellis, Fran McCarthy, Cathy Goad, Jim Grantner, Felicia Hill, Alan Duncan

Special Events Committee
Chair: Wendy Stanley, Carlsbad Medical Center
Members: Alan Duncan, Bob Cullum, Erica Ellis, Felicia Hill, Kathi Smith, Kyle Marksteiner, Lori Elyasevich, Michael Stanley, Scott Goodale

2012 Campaign Cabinet
Education Division Chairperson
LaVern Shan

WIPP Chairperson
Shane Hendrickson

Potash Co-Chairpersons
Tonk Chester
Cathy Goad

These are the times when we tap our can-do spirit and reach out to help our neighbors. In our community, we stand up for kids, we help families thrive, and we believe in a lifetime of independence.
UNITED WAY OF CARLSBAD & SOUTH EDDY COUNTY

VISION

United Way of Carlsbad & South Eddy County envisions a world where all individuals and families achieve their human potential through education, financial stability and healthy lives.

Imagine a world that fosters hope and opportunity for everyone. A world where...

- All children receive a quality education that offers a pathway to a brighter tomorrow.
- The cycle of poverty and financial dependence ends, and productive livelihoods begin for even the most disadvantaged.
- Communities not only set significant and measurable goals to advance these fundamental elements of human development, but achieve them.

EDUCATION

United Way is working at critical points along the school spectrum to ensure the academic success of youth. This mobilization of resources is creating hope and opportunity for youth who are better prepared to succeed.

2012 EDUCATION ACCOMPLISHMENTS

368 children were identified as needing developmental services through the CARC Child Development Center.

37% fewer children needed Individual Education Plans (IEP) when they transitioned to the school system thanks in part to services they received through CARC Child Development Center.

Boys & Girls Club of Carlsbad provided 155 homework assistance sessions.

97% of the members of the Boys & Girls Club passed to the next grade.

Girl Scouts provided 20 school-based programs to young girls in Carlsbad.

South Eddy County Boy Scouts earned 795 merit badges in various life skills areas.
UNITED WAY OF CARLSBAD & SOUTH EDDY COUNTY

2012 INCOME ACCOMPLISHMENTS
151 adults learned to read, write and speak English through the Carlsbad Literacy Program.

2 out of 3 families served by the Carlsbad Transitional Housing & Homeless Shelter program obtained employment within 6 weeks and maintained it through completion.

35 people with development disabilities were employed in the community with help from CARC Supported Employment.

1,786 household received over 149,000 pounds of food through the Calvary Assembly of God’s Mobile Food Pantry.

INCOME
United Way understands the local economy and is working with individuals and employers to create a stronger community. Through our efforts, individuals are seeing success and communities are being impacted by improved financial stability.

2012 HEALTH ACCOMPLISHMENTS
CASA provided 90 hours of training to volunteers to help them better assist and advocate for abused and neglected children.

The Battered Families Shelter spent over 62 hours assisting with crisis intervention.

5,310 days of residential shelter was provided to victims of domestic violence at the Battered Families Shelter.

Children and teens participated in 77 sessions of the SMART Moves prevention program held at the Boys & Girls Club.

Kids’ Safehouse conducted 167 forensic interviews to children suspected of being sexually assaulted.

95% of those surveyed by the Kids’ Safehouse reported feeling less overwhelmed and more capable of dealing with the child’s disclosure of abuse and the current situation.

HEALTH
United Way understands the socioeconomic factors that influence health outcomes. Through improved individual awareness and information, United Way is helping individuals in our community improve their health.
# 2012 Top Businesses & Corporations

## Platinum
- Mosaic Potash
- Intrepid Potash
- Nuclear Waste Partnership, LLC
- Constructors, Inc.
- Carlsbad National Bank
- Carlsbad Medical Center
- Western Commerce Bank
- Forrest Tire
- Landsun Homes
- Sandia National Labs
- Xcel Energy
- Carlsbad High School
- BES Rental & Sales
- Sunset Elementary

## Gold
- CMS Administration
- Burba Cole & Overstreet
- Pioneer Bank
- Carlsbad Battered Families Shelter
- Monterrey Elementary
- Craft Elementary School
- P.R. Leyva Middle School
- UPS
- Pate Elementary
- Riverside Elementary
- SM Stoller
- Eddy County

## Silver
- CARC, Inc.
- Alta Vista Middle School
- Jefferson Montessori Academy
- Puckett Elementary

## Bronze
- Emmitt Smith
- Dunagan & Associates
- IBM
- Taylor Water Well Service

## Pewter
- CMS Special Education Dept.
- CMS Technology Dept.
- ERA/Montgomery
- AWARE Program
- Jones, Kluesner & Day
- Joseph Hanttula, CPA
- Guaranty Title
- ConocoPhillips

## $2,000 & Above
- Early Childhood Education Center
- NMSU-Carlsbad
- NM Gas Company
- Yates Petroleum
- Joe Stanley Smith
- Community Action
- WRES

## $1,000-$1,999
- Hillcrest Elementary
- Carlsbad Downtown
- Lions Club
- Devon Energy
- Pardue Limited Company
- Stevens Inn

## $750-$999
- CMS Warehouse
- The Mine Supply Company

## $500-$749
- Carlsbad Elks Lodge #1558

## $250-$499
- Bamboo Garden Restaurant
- Kids' Safehouse of Eddy County
- Wal-Mart
UNITED WAY OF CARLSBAD  
& SOUTH EDDY COUNTY

DONOR RECOGNITION

PLATINUM

Mr. & Mrs. Robert Forrest  
Don Purvis   
Timothy Rotert

William Boyer  
Tonk Chester

GOLD

Terry & Gerry Frye   
John Overstreet   
Greg Borden   
Mark Lammers   
Randy & Carolyn Logsdon   
Michael G. Stanley   
Val K. Cannon   
Ernie Carlson   
Don Sexton   
Don Kidd   
Tracy Francis   
Dale & Kathy Hood   
Ralph Ramstetter   
Mr. & Mrs. Charles Cable   
Michael Cleary   
Mr. & Mrs. Dick Forrest

Roy Torres  
Patrick Carrillo  
Michael E. McLean  
James L. Johnson  
Robbie C. Slusher  
Harrell D. Mathews  
Philip Paul Brown  
Ric Serrano  
Michael J. Ackman  
Joe L. Carrasco  
Wendy D. Hammett  
Donald T. Morrow  
Russell A. Yates  
Kevin W. Brown  
Sarah Gonzales  
Odin L. Nelson

SILVER

Jerry Pierce   
Rachelle Thompson   
Steve A. Gamble

Robertito Lopez  
William T. Briggs  
Danny & Roberta York

BRONZE

Rey Carrasco   
Steve Offner   
Tammi McDonald  
Chad Campbell   
Joseph Cheatham   
Neil Dixon   
Alan Duncan

Jamie Duncan  
Cathy Goad  
Nicholas Muloshi  
Claude V. Powell Jr.  
Tommy Reynolds  
Dennis Wilken  
LaDawn Campbell

$2,000 & ABOVE

Dave & Susan Honeyfield   
Mr. & Mrs. Robert Baldridge

$1,000-$1,999

Christopher Mathews  
Joseph A. Garrett  
Aaron Baiza  
Jimmie R. Johnson  
Aron & Tamrah Ortiz  
Tommy Vasquez  
Will & Jasmine McCauley  
Christa G. Estrada  
Jesse W. Boyd  
John D. Anderson  
Alan C. Fernandez  
Nicholas Flores  
Michael P. Goad  
Ken & Joan Peeper  
Gary & Sharleen Strong

$750-$999

Jason & Robin Rhodes  
Mike & Becky Sensibaugh

$500-$749

John Giblin  
Jeff Knox  
Leslie A. Lewis  
Donavan Mager  
Paul J. Paneral  
Adan M. Pena  
James Sparks
UNITED WAY OF CARLSBAD
& SOUTH EDDY COUNTY

Linda Pruett
Daniel Arrington
Donnie Baker
Suzanne Ballard
Jesus Barriguez
Casey Buff
Robert Burdine
Roy Carrasco
Richard Davis III
Eric Espinoza
Bobby Forrest
Richard & Susan Forrest
Ferdinand Garcia
Francie Gordon
Jerry Granger
Lloyd Higgins
Jill Holt
Phillip Howell
James Kertis
Justin Kirkes
Brian & Dina Marshall
Shawn & Susan Martin
Julian Martinez
Manuel E. Montoya
Mary Ann Mullins
Toribio Murillo Jr.
Jennifer Nicholas
Selena Palanca
Christina Post
Mellie Rodriguez-Cannady
Judy D. Seal
Anne Shoemaker
Roger Tiffner
Ruben Vasquez
Jackie Webb
Paul Wilmot
Linda Palma
Robert Barnes
Larry Coalson
Mr. & Mrs. Joe Epstein
Richard & Dixie
Godfrey
Mr. & Mrs. Gene
Harbaugh
Mr. & Mrs. John Heaton
Mr. & Mrs. Lane Martin
Hazel V. Pardue
Raymond F. Peters
Brant Cottingham
Joe & Gayleen Carrasco
JB Underwood
Steven & Kathleen Smead
Martin G. Hernandez
Tommy Duarte Jr.
William C. Hutchison
Joan M. Carter
Donna N. Lawson
Joe L. Hernandez
Kelly W. Allen
Danny S. Melendrez
Jimmy S. Carrasco
Freddy J. Garcia
Christopher A. Allen
Chris Anaya
Glen Wages
Justin Medina
Tim & Llasa Micinski
John Ramirez
Eddie Romero
George C. Hughes
Manuel B. Lopez
Jeff McKillip
Jake W. Tipton
Gilbert A. Castillo
Joel E. Carlton
Tiffany M. Ramirez
Zachery H. Roberson
Paul E. Mager
Linda S. Baltzell
Trine R. Carrasco Jr.
Josue Leija
Christopher Vasquez
Santiago Carrasco
Edwin Colon
Ramey & Kathy
Graziano
Randall H. Brown
William Brown
Jason & Constance Tate
William W. Weldy
Luell D. Meadows
Chris Rodriguez
Gina A. Smith
Brian Wright
Richard M. Carrasco
Guillermo M. Gomez
Genaro J. Hernandez
Brandon A. Lawler
Dale A. Arnold
Steve D. Barnes
Shawn & Candace
Calloway
Mario Dominguez
M.J. Dorado
Shawn F. Downing
William J. Goeke
Juan M. Gutierrez
Chance Harris
Jose & Nikki Juarez
Eric & Amber Madrid
Doyle D. Magby
UNITED WAY OF CARLSBAD & SOUTH EDDY COUNTY

Richard L. Mathews
Joel S. Onsurez
Jay Rhodes
Elesio C. Rodriguez
Elizabeth Rodriguez
Robert L. Trujillo
Tony R. Trujillo
Lewis D. Willis
Gary K. Yerby
Dana J. Chavez
Lupe Chavez
Aaron H. Franco
Rachel N. Garcia

Kenneth M. Willis
Chad James Humke
Tony Hunter
David J. Sedillo
Elliot Uresti
Jennifer L. Macias
Zack Palen
Kevin L. Cummins
Jeffrey S. Cox
Jesus B. Dela Cruz
Cindy Dunn
Robert T. Granger
Dale A. Harris

Tammy J. Harris
Peter Pavlik
David & Daisha Vaughn
Robert L. Trujillo
William L. Vera
William W. Clifton
Thomas E. Meadows
Mila McCutchen
JA McLemore
Richard Chavez
Ronald Galbraith

PEWTER

Aaron Marrs
Alan Pistole
Allen Brininsool
Angela M. Johnson
Angie Vickrey
Annessa B. Branaman
Anthony Maldonado
Antonio Chavez
Arthur Cisneros
Aurelio Calderon
Barbara Kouba
Beth McCormick
Betty Egibom
Bill Bartlett
Bill B. Davis
Blas Castaneda
Bob Pressett
Bobbie Eaton
Bobby Sims
Bonnie B. Barnes
Brian Dobson
Brian Haeck
Brian Nicholas
Candace Rein
Carl Bryant

Catherine Nesser
Cecil Henderson
Charles Burkham
Chris Martinez
Christian Duran
Christopher Duncan
Christopher Rohde
Clifford R. Howard
Clorissa Osborn
Corey Strieby
Cory Burnett
Daniel Wilson
Daniel O. Ramirez
David Phillips
David Shores
David Shoup
David L. Sampler
Denice Peterson
Dennis Hellon
Dennis N. Cook
Don Owen
Donnie Gossett
Doug Young
Douglas Eastin
Wesley Boatwright

$250-$499

Ed Hess
Ed Yopp
Elizabeth Easley
Ernesto Torres
Estela Osborne
Fabian T. Carrasco
Farok & Cynthia Sharif
Fran McCarthy
Frank Navarrette
Frank O. McKenna
Gabriel Brown
Gail Carter
Gemma Ferguson
George R. Cullum Jr.
Greg Bruce
Guerrero Reyez
Harrell Markham
Hector Jimenez
Hector S. Olivas
Eddy Parra
HW Bellows
Iris Hartsock
Isaac Campos
Isaac Hernandez
Jack L. Dickson
UNITED WAY OF CARLSBAD & SOUTH EDDY COUNTY

James Daley  Marvin Schrock  Samuel Creech
James Estrada  Matthew Carper  Samuel Tupper
Janis C. Shoup  Max Davis  Sandra White
Janis R. Trone  Melissa Owens  Shilah Jordan
Jared Beavers  Micah Callicoat  Stephen Thatcher
Jared Walterscheid  Michael Phillips  Steven Franco
Jeffrey Gordon  Michael Younger  Steven Schroeder
Jennifer Hendrickson  Miguel Raul Jimenez Jr.  Terry Grube
Jesus M. Rodriguez  Mike Espinoza  Theresa Calhoun
Jimmy Neatherlin  Mike Martinez  Todd Sellmer
Jocelyn T. Hensley  Misti Fernandez  Vernon Dunaway
Joe Dunlop  Nancy Rogers  Veronica Hernandez
Joe Perez  Nancy F. Beard  Wesley Thomas
Joel Stanley  Patricia Kantowitz  William Stewart
John Brazeal  Patricia L. Dunbar  William E. Barnhart
John Switzer  Patrick Yeager  Yongliang Xiong
John Vandekraats  Paul Maxwell  Zachary Bazyk
John Wright  Pedro Lopez  Zachary Walterscheid
Johnny Colvin  Penny Poole  Alexander P. Fish
Jonathan Putman  Penny Martinez  Alvin Rodriguez
Joseph V. Fierro  Pete Cooper  Andrew J. Hauser
Joy Cooksey  Phillip Lara  Antonio E. Campos
JP Jones  Phyllip Huett  Ben N. Vasquez
Julio Leija  Randy Martinez  David C. Gordon
Justin Chase  Ray A. Juarez-Gonzalez  Doreen M. Kennedy
Karrie Jane Lynn  Reyes Franco  Eva L. Whiteaker
Kathy Hernandez  Reynaldo Herrera  Jason Luna
Kena C. Thompson  Richard Brugman  Javier C. Sierra
Kenney Rayroux  RJ Carrasco  Javier G. Garcia
Kim Greer  Robert Durr  Joe F. Najera Jr.
Larry Johnston  Robert Hartert  Joe L. Rodriguez
Laura Garcia  Robert Nieman  Jose L. Lerma
LaVern Shan  Robert E. Boatman  Joseph L. Hedrick
Lawrence M. Rainwater  Roland Martinez  Kevin W. Pollitt
Lee White  Roman Villarreal Jr.  Manuel R. Mendoza
Leroy Ross  Ronnie Romero  Oscar V. Franco
Linda Morehouse  Roy Thomas  Robert L. Patton
Lydia Bryant Williams  Rudy Fierro  Ronald R. Hatley
Madeleine B. Ferguson  Rudy Granger  Ruben Parraz
Marcus Bluth  Ruthi Corazzi  Shonna L. Peterson
Mario Fierro Jr.  Sabas Hernandez  William Barrett

Thank you South Eddy County for working hard to make our community a better place for all to live. Together we can make a positive IMPACT on the future. United Way simply would not be possible with out “U”!
UNITED WAY OF CARLSBAD & SOUTH EDDY COUNTY

2012 ORGANIZATIONAL HIGHLIGHTS

- In January 2012, the Board of Directors voted to provide $1,500 to the Carlsbad Fire Department for the purchase of a new “Jaws of Life”.

- In an effort to help combat the childhood obesity problem in New Mexico by fostering physical activity among school children, the Board of Directors provided $5,000 to Loving Municipal Schools for assistance with the purchase of playground equipment.

- In March, the Board of Directors adopted a strategic plan that would take an aggressive approach to improving education in South Eddy County. 25% of dollars raised in 2012 will be earmarked for education programs targeting proficiency in Reading, Science & Math and the current 65% graduation rate.

- United Way of Carlsbad & South Eddy County volunteered to become the fiscal agent for the Eddy County Dolly Parton Imagination Library, a program that provides books, free of charge, to children under the age of 5.

- Because kids cannot learn if they do not have the proper tools, we celebrated the start of our annual campaign with a popular “Stuff the Bus” program and gave away thousands of spiral notebooks, backpacks, pens and pencils to local children at the start of the school year. This year, business partners contributed a whopping $9,024.00 to the event. United Way staff, board members and community led teams also set up shop outside of Carlsbad’s Wal-Mart with generic supplies lists. Members of the community who were visiting the store helped by purchasing and donating items.

  Not only was United Way of Carlsbad & South Eddy County able to achieve their target of supplying 1,000 kids with school supplies, but they exceeded the goal for a total of 1,250 kids! This represented a 250% increase over the 2011 goal.

- In November, the Board of Directors approved a $5,000 allocation to Leadership Carlsbad to be used towards the Boys & Girls Club kitchen remodel project. Upon completion, the club will be able to utilize various funding sources to provide healthy snacks and meals to children.

- December found the Board of Directors in the giving spirit as they voted to assist the Loving Outreach Program with their food distribution program in both Carlsbad and Loving.
Please know we have endeavored to create the most accurate list of individuals possible. However, we extend out apologies to any who might have been inadvertently omitted.