



**BOARD OF SELECTMEN
PRESENTATION**

May 17, 2012

Executive Summary

The Weston Warm-Up Fund was created to help families in need.

- **This current 2011/2012 heating season (FY 2011) we expect to provide direct fuel assistance to 40 families in the amount of \$89,000 (heat and heat related expenses).**
- **Our overhead expenses were 4% of our total funds expended. Overhead expenses are primarily printing and mailing expenses incurred in conducting our town wide solicitation.**
- **We received a donation from the Town of Weston for \$8,000.00 in June 2011, which is included in the FY 2011 funds raised.**

Mission of the Warm-Up Fund:

The Weston Warm-Up Fund is a non-profit charitable organization operated by an all-volunteer Board of Directors. Its mission is to assist low income Weston residents by helping pay for:

- **Energy to heat their homes**
- **Critically needed repairs and/or replacements to home heating equipment**
- **Improvements to increase their homes' energy efficiency**

Criteria to be a recipient of the WUF:

- **Individual income of \$45,000 or less verified through tax return and/or social security statements with limited financial assets;**
- **Additional allowance of \$5,000 per person living in the household. For example, a two-parent family with two children would qualify if their joint income is \$60,000 or less;**
- **Must be a resident of Weston;**
- **The Board reviews all applicants on a case by case basis.**

Who are our clients?

We assisted 40 households during the 2011/2012 heating season.

This is down by 13 households due to 2 deaths, 4 moves from foreclosures, 4 other moves and 9 former clients who are doing better, offset by a few new clients this year.

Of those 40 households approximately:

- **The average household income of our recipients is approximately \$25,000**
- **20 recipient households have at least 1 individual over 65 years of age**
- **Approximately 9 recipient households have a child/children under the age of 21**
- **5 recipient households have a disabled/impaired member**

Financial Overview

	FY 2010	FY 2011	FY 2012 Year to Date
# of Clients	52	53	40
Client Heat Cost	\$115,268	\$167,876	\$103,625
Fundraising Cost	2,612	2,806	3,372
Other WUF Overhead	<u>3,089</u>	<u>1,582</u>	<u>310</u>
Total Funds Needed	\$120,969	\$172,264	\$107,307
NEON & Operation Fuel Grants	<u>23,184</u>	<u>18,098</u>	<u>9,893</u>
Balance for WUF	\$97,785	\$154,166	\$97,414
WUF Funds	<u>\$89,111</u>	<u>\$117,507</u>	<u>\$92,346</u>
Clients paid Surplus/(Shortfall)	8,674	36,659	5,068
WUF Avg payout %	94%	76%	95%

Donations are made by the following: THANK YOU!

- **Individuals**
- **Kiwanis**
- **Town of Weston**
- **Weston Women's Club**
- **Sunrise Rotary**
- **United Way**
- **Weston Women's League – Farmers Market**
- **Fairfield County Bank**
- **IBM Matching Grant Program**
- **Sippin Energy**
- **Westport/Weston Foundation**
- **Multiple Family Foundations**
- **Norfield Church (both Foundation and parishioners)**
- **Emmanuel Church (tree burning and parishioners)**
- **Temple Israel Community Service Gift**
- **St. Francis - parishioners**

Things you need to know:

- **This was our fourth year that Weston Warm-Up and Weston Social Services sought and procured NEON & Operation Fuel funds totaling \$9,893. There were fewer funds available from Connecticut state sources.**
- **For the past 10 years, we have been paying between 85 – 95% of fuel bills and heat-related expenses incurred by our recipients. THIS YEAR IT WILL BE ABOUT 95%.**
- **In many cases, if we did not intervene and promise to pay for heating fuel, the fuel supplier would not deliver oil to these Weston residents.**
- **We have excellent relationships with our clients' fuel providers and work with them throughout the year.**
- **We encourage our recipients to obtain the lowest cost possible and to conserve. Three way conversations (among ourselves, our client and the oil company) take place often. Our oil providers are incredibly generous and work with us on the absolute lowest price possible.**
- **We encourage recipients to have energy audits and take other conservation actions.**
- **Factors we cannot control are the amount of contributions that we receive, the severity of weather, the number of recipients and the future cost of fuel.**
- **We have six recipient case workers on our board to do a better job for our clients. This subcommittee is dedicated, hard working and knowledgeable. We never have, or never will, have any breaches in confidentiality.**

What is WUF doing to carry out its mission?

What we have done or are doing to increase contributions this year and in the foreseeable future?

- **We are continuing to interface with local civic groups, churches and synagogues.**
- **We are always looking for possible grants for which we qualify – this is not easy.**
- **We are continually using more creative methods of fundraising such as capitalizing on the Kiwanis Firewood Project, Kiwanis Wine Tasting Event, the Epiphany tree burning evening at Emmanuel.**

What have we done besides fund raising?

- **Worked with Weston Social Services to assist clients with application for grants and obtaining emergency heat**
- **We work with clients and encourage them to shop for lowest prices**
- **We work with energy suppliers and clients to pursue energy audits and remediation to help clients conserve fuel (reducing future long term consumption and cost)**

We are pleased to see that a number of our clients (9) have experienced improvement in their situations this past year. We are glad to have been a part of helping them to get through these difficult times.

In a nutshell:

The Warm-up Fund

- **helped 40 families stay warm last winter**
- **provided approximately \$90,000 of help from donations by generous Weston individuals and organizations**
- **maintained a very low overhead expense ratio (4%) because committed volunteers do the work – 96% of funds go directly to the charitable purpose.**
- **anticipates a similar or higher need for FY 2013**
 - **stable or slight increase in # of clients from continuing effects of the recession on families**
 - **continued high prices of oil compared to 2010/2011/2012**
 - **a need to maintain fundraising to keep a strong support level to families needing help**
- **requests the continued support, at a lower level of \$4,000, from the Town of Weston due to our continuing strong support from individuals in the community.**