

MISSION *To improve measurably the lives of individuals and families in Palm Beach County by uniting the resources of donors, volunteers, agencies and the community.*

United Way of Palm Beach County 2015-16 Board of Directors

United Way of Palm Beach County is a volunteer-driven organization representing our entire county. From the Board of Directors to community impact volunteers, and the hundreds of others who lend a hand each year, volunteer leaders ensure United Way of Palm Beach County continues to make a measurable difference in the lives of people in need in our community.

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"B"ing the Best

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of Palm Beach County



2015 - 2016 ANNUAL INVESTMENT REPORT



United Way
of Palm Beach County

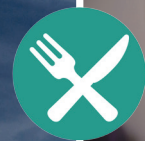
UNITE IN THE FIGHT to Improve Palm Beach County

FOR NEARLY 90 YEARS, UNITED WAY OF PALM BEACH COUNTY HAS SERVED AS THE TRUSTED LOCAL LEADER IDENTIFYING AND ADDRESSING OUR COMMUNITY'S MOST CRITICAL NEEDS.

United Way is one of the largest fundraising organizations in Palm Beach County and it's unique in the fact that it's also a funder of other local nonprofits. Of the \$15 million raised annually, 90% is invested right back into the community in a variety of meaningful ways, including 86 local nonprofit programs that are sustainable and producing lasting results. One in five residents, a quarter of a million people, participate in at least one United Way funded program - that's your colleague, neighbor, friend or family member.

United Way of Palm Beach County funded programs fight for: access to health care, housing for the homeless, mentors for children, financial stability for families, food for the young and senior population, assistance for people with special needs, and helping kids graduate and thrive.

A team of volunteer experts monitor these investments ensuring that outcomes of the funded programs are met and targeted results are achieved. This exemplifies United Way's longstanding reputation as being a trustworthy and efficient organization. Donors can feel good knowing their dollars are being put to work in the best way possible, where they are needed the most.



HUNGER RELIEF PLAN

This past year, the Hunger Relief Plan partners have been working hard to create the strong foundations needed to build lasting change using a collective impact model. Nearly 100 volunteers, representing all sectors of our community, have been devoted to implementing tactics and strategies from the Hunger Relief Plan in the areas of senior and childhood hunger, infrastructure and the Glades community. Coordination and collaboration are particularly important for the success of our work.

In March of 2016, four workgroups began implementing strategies and tactics:

► Childhood Hunger ► Senior Hunger ► Glades Hunger ► Infrastructure



THIS YEAR'S SUCCESSES

Backpack Program

Served 1,237,600 meals to 3,400 children.

Home Delivered Meals

Served 1,012 seniors 263,120 meals.

Group Meals

Served 2,894 people 752,440 meals.

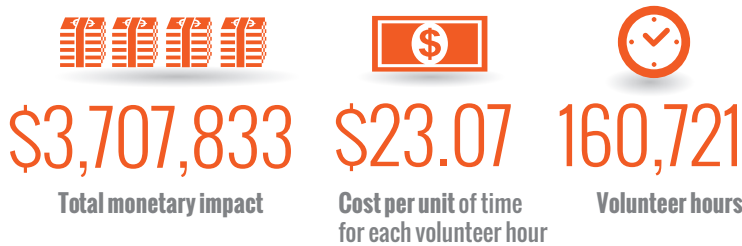
Summer Breakspots

Served 1,022,099 meals.

WE HAVE MORE THAN 200,000 RESIDENTS, 64,000 OF WHOM ARE CHILDREN, WHO DON'T HAVE ENOUGH TO EAT ON A DAILY BASIS. TOGETHER, WE CAN CHANGE THAT!



VOLUNTEERS MAKE A DIFFERENCE



The Volunteer Center plays an integral role in United Way of Palm Beach County's mission to change lives and shape our community.

Our volunteer program is aimed at making volunteering easy and flexible to fit everyone's busy schedule. Volunteer opportunities are available for individuals, families, organizations and corporations.

"We make a living by what we get, but we make a life by what we give." - Winston Churchill

Corporate Volunteerism

Does your company demonstrate corporate social responsibility? Statistics show that consumers are attracted to companies that are responsive to local needs. Ultimately, focusing attention on social responsibility enhances your business.

United Way of Palm Beach County's Corporate Involvement Program is a resource your company can use to demonstrate social responsibility right here in your community.



YOUR INVESTMENT REPORT



90% OF DONATIONS STAY LOCAL

To be certain that funds are used to address our community's most pressing issues, United Way staff and volunteers hold annual community conversations with stakeholders across all sectors. These conversations uncover emerging needs that require immediate attention. United Way has invested in more than 86 programs and numerous special projects that strategically address those needs. All funded programs are vetted and tracked to verify sustainability and effectiveness. These metrics can then be compared with community



indicators, such as graduation rates and hunger, to demonstrate where we are making a difference and where there are still gaps in services.



Guiding Principles and Values

United Way staff and volunteers adhere to these guiding values:

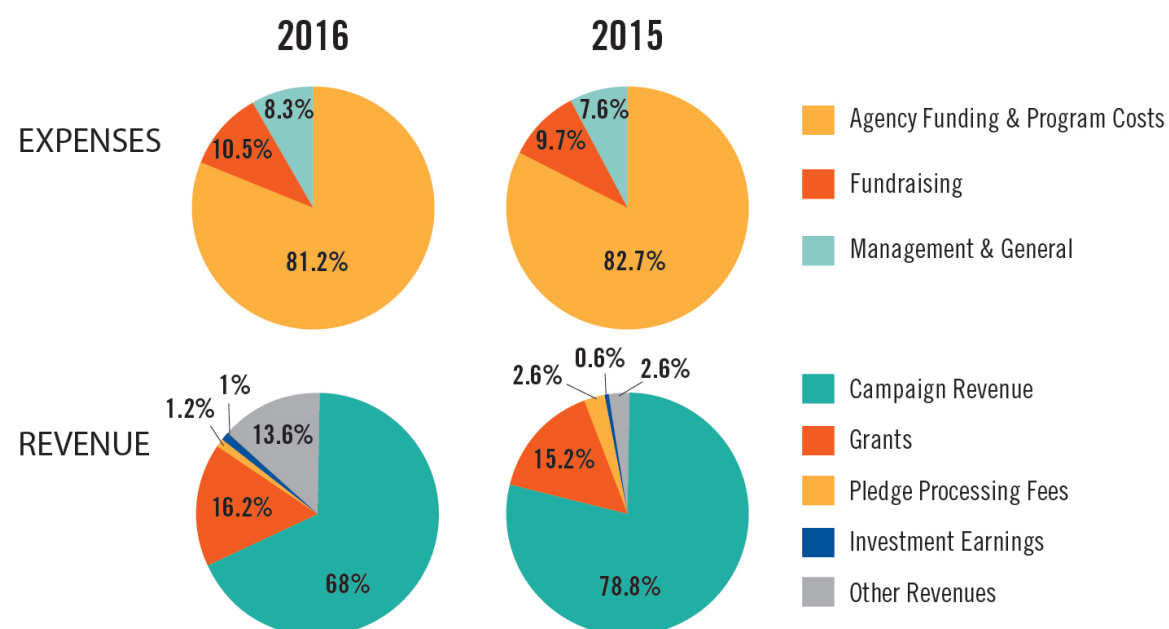
- Caring
- Inspiring
- Approachable
- Trustworthy
- Dynamic
- Results-Oriented
- Innovative



UnitedWayPBC.org

Trustworthy. Efficient. A Champion.

FINANCIAL ACCOUNTABILITY



Join the next generation of philanthropic leaders



EMERGING | LEADERS | SOCIETY
Connect-Serve-Lead



MISSION

To attract, enlighten and rally early to mid-career professionals around United Way of Palm Beach County by creating a society of like-minded individuals who believe in giving back financially while being able to network and participate in community service projects and educational opportunities.

BEHIND EVERYTHING WE DO, THERE ARE PEOPLE LIKE YOU WHO MAKE IT HAPPEN.

WOMEN'S LEADERSHIP COUNCIL
EDUCATE. ENGAGE. EMPOWER.

Celebrate the power of women to bring about positive change

MISSION

To build and foster a powerful, passionate network of women who create impactful change in our community through the focused investment of their time, talent and resources.





Community investment is United Way’s business. By making a leadership gift, you join the thousands of other concerned people who trust in United Way to make that impact and produce smart solutions to meet the needs of the community. A leadership gift of \$1,000 annually is your investment in what matters – lasting results.

Benefits of the Leadership Circle

- ▶ Demonstrates your leadership and commitment to your community.
- ▶ Gives you the opportunity to make a significant and lasting impact.
- ▶ Inspires others to follow.
- ▶ Your gift is multiplied when combined with others.
- ▶ Exclusive Invitation to quarterly DINE UNITED lunches, tours and recognition events.



A LEADERSHIP GIFT IS YOUR INVESTMENT IN WHAT MATTERS – LASTING RESULTS.



DINE UNITED Lunch and Tour

Exclusive opportunities to experience United Way funded programs first hand. Tour a partner agency and learn how your investment is making a difference.



STATEMENTS

UNITED WAY OF PALM BEACH COUNTY, INC.
Statements of Financial Position • June 30, 2016 and 2015

	2016	2015
Total current assets	\$7,929,401	\$7,877,200
Total non-current assets	11,294,144	9,445,568
Total assets	\$19,223,545	\$17,322,768
Total current liabilities	\$8,529,718	\$8,067,007
Total non-current liabilities	60,326	64,004
Total liabilities	8,590,044	8,131,011
Net assets	10,633,501	9,191,757
Total liabilities and net assets	\$19,223,545	\$17,322,768

Statements of Activities • Years Ended June 30, 2016 and June 30, 2015

	2016	2015
Contributions and grants	\$14,789,398	\$15,716,709
Other revenues	2,198,070	563,323
Gross revenues	16,987,468	16,280,032
Program costs	12,698,050	13,552,444
Fundraising costs	1,555,902	1,584,371
Management and general costs	1,202,701	1,195,496
Total expenses	15,456,653	16,332,311
Change in net assets	1,530,815	(52,279)
Net unrealized gains	(89,071)	(25,025)
Net assets, beginning of year	9,191,757	9,269,061
Net assets, end of year	\$10,633,501	\$9,191,757

**The financial information presented has been derived from United Way of Palm Beach County’s audited financial statements. An audit was conducted by Daszkal Bolton LLP, who expressed an unqualified opinion.*

Partner agencies receiving designations from United Way of Palm Beach County’s campaign are charged an administration fee based upon amounts received in accordance with United Way Worldwide guidelines. United Way of Palm Beach County is an approved Federation representing partner agencies in the Combined Federal Campaign. The partner agencies participating in the Combined Federal Campaign have not been charged dues and/or service charges as a requirement for participation in the Combined Federal Campaign.



Exceptional Individuals Changing Lives and Transforming Communities

Tocqueville Society Members

MILLION DOLLAR ROUNDTABLE **\$1,000,000 and above (Cumulative Giving)**

Countess Henrietta de Hoernle*
Mrs. Sara Jo Kobacker
Mrs. Mary Ann Perper
Mr. John F. Scarpa
Mr. and Mrs. Raymond Zimmerman

NATIONAL SOCIETY **\$100,000 - \$999,999 (Annually)**

Mr. and Mrs. Raymond Zimmerman
Mrs. Sara Jo Kobacker

ORDER OF EQUALITY | \$50,000 - \$74,999

Anonymous

ORDER OF LIBERTY | \$25,000 - \$49,999

Anonymous
Mr. Robert M. Beren
Mr. and Mrs. Stephen R. Demeritt
Mr. and Mrs. George Giguere
Mr. James Robo
Mrs. Mary Ann Perper
Mr. and Mrs. Bogdan Nowak
Mrs. Ramona Ann Spears
Mr. and Mrs. Frank E. Walsh
Mr. and Mrs. John "Jack" Welch

ORDER OF INDEPENDENCE **\$15,000 - \$24,999**

Anonymous
Mr. and Mrs. Barney Barnett
Mrs. Deborah H. Caplan
Mr. Moray P. Dewhurst
Mr. George T. Elmore
Mr. and Mrs. Tom A. Giuffrida
Mr. Stephen C. Moore
Mr. and Mrs. Lee S. Owen
Mr. Armando Pimentel
Mr. Jonathan Satter
Mr. Robert Thibault

SOCIETY MEMBERS **\$10,000 - \$14,999**

Anonymous
Mr. Miguel Arechabala
Mr. and Mrs. Ronald G. Assaf
Mr. and Mrs. Eugene Bolton
Mr. Larry E. Brown
Mrs. Fabiola Brumley
Mr. Dan Cane
Mr. and Mrs. Alexander R. Castaldi
Ms. Trudy Crowetz
William and Mary Donnell
Mr. and Mrs. Frank P. Doyle
Mr. Alexander W. Dreyfoos, Jr.
Mr. Michael T. Dunn
Ray and Nancy Faloona
Mr. Alfonso "Alfy" Fanjul
Mr. Jose "Pepe" Fanjul
Mr. and Mrs. Sidney Forbes
Mr. Sam A. Forrest
Mr. and Mrs. David G. Frey
Dr. Laurie J. George
Mr. Cary Ginter
Mr. and Mrs. Leonard Gray
Mr. and Mrs. Jeff Greene
Kenneth L. and Summer J. Groves
Mrs. Martha B. Hartfiel
Mr. Stephen J. Klingel
Mr. and Mrs. Howard L. Lance
Dr. Rene Lerer
Mr. Bob Levinson
Mr. and Mrs. Jon R. Levinson
Mr. and Mrs. H. Irwin Levy
Mr. Mark Maisto
Mr. John Marasco
Mr. Arthur Menor
Mr. and Mrs. Jack Nicklaus
Ms. Heather Nisbeth
Mr. and Mrs. James E. Perella
Ms. Christine Petranchuk
Nancy and Steve Schwartz
Mr. Greg Seelagy
Mr. Eric Silagy
Mr. Lawrence Silverstein
Mr. Jeffrey Sopshin
Mr. William Striebe
Mr. Thomas Vining
Mr. and Mrs. Roger Walcott
Mr. Peter Wellman
Mr. and Mrs. Del Williamson
Mr. William L. Yeager

As of June 2017



With a minimum investment of \$10,000 annually, Tocqueville Society members are philanthropic leaders who believe being surrounded by like-minded investors is the best way to collectively tackle some of Palm Beach County's biggest issues.



"America has a long and rich tradition of generosity that began with the simple acts of neighbor helping neighbor."

- Alexis de Tocqueville

Benefits of Tocqueville Society Membership

- ▶ Exclusive monthly "Tocqueville Tuesday" luncheons (in season) featuring community leaders and perspectives from CEO
- ▶ Members-only evening cocktail hour social events (Fall and Spring)
- ▶ Recognition in The Palm Beach Post and Tocqueville Society member list
- ▶ "Tocqueville Impact" newsletter highlighting the Tocqueville Society and the impact your gift has on our community
- ▶ Exclusive and customizable volunteer opportunities on request
- ▶ Quarterly "Dine United" agency tour followed by lunch



*Deceased