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KIM JONES
Marsh & McLennan

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Publix Super Markets

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BOARD of Directors

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The School District of Palm Beach County

Gokul Parthasarathy
TekIntelligence

Michael Pumps
NPEC TV12

Sallie Ray
Debtline

Anthony Robinson
Ultimate Software

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Ex-Officio/Women’s Leadership Council Chair

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OUR MISSION
To ensure that everyone in Palm Beach County has access to the basics: a quality education, a place to live, financial stability, good medical care, and enough to eat.

ANNUAL INVESTMENT REPORT

UnitedWayPBC.org
477 S. Rosemary Ave., Suite 230
West Palm Beach, FL 33401
561.375.6600
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 of Palm Beach County funded programs fight for access to the basics: a quality education, a place to live, financial stability, good medical care, and enough to eat.

Guiding Principles and Values

United Way staff and volunteers adhere to these guiding values:

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

HUNGER RELIEF PLAN 2016-17 Highlights

The Hunger Relief Initiative’s Advisory Committee, comprised of leaders from local foundations, businesses and human service agencies, United Way of Palm Beach County, Palm Beach County Government, and the School District of Palm Beach County continues to guide four workgroups that are focused on achieving the goals outlined in the Hunger Relief Plan, available on our website UnitedWayPBC.org

Backpack Programs: Backpack providers and nutritionists came together to establish guidelines around the nutritional components of what should be included in a backpack. A weekend backpack should consist of six meals. 6,817 weekend meal backpacks were distributed to Palm Beach County School District students.

Increase Cold Storage: United Way of Palm Beach County received $50,000 a year for three years from the Farris Foundation to increase the total cubic feet of cold storage for pantries within Palm Beach County. This will allow more food to be distributed year-round as well as help increase the overall amount of food that can be distributed by the pantries. This will also help reduce the 70 million pound shortfall of available food.

Summer Meal Outreach: In the summer of 2017, 1,022,033 meals were served to children through the School District and Palm Beach County Youth Services.

Child and Family Supplemental Nutrition Assistance Program (SNAP) Outreach: A comprehensive target market campaign was developed to increase the number of people accessing congregate meal sites and increase the number of volunteers working at each site. In 2017, 2,894 seniors were served at congregate meal sites. In addition, USDA’s ‘My Plate’ nutritional guidelines have been translated and are now available in the languages of French Creole, Spanish and English.

Urban Farms: Urban Farms are now accepting EBT payments which will allow for low-income families to be able to afford fresh fruits and vegetables. These Farms are located in high need areas which alleviates the transportation barrier that impacts many low-income families.
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. In 2016-17, United Way invested in more than 86 programs and numerous special projects that strategically addressed those needs. All funded programs are vetted and tracked to verify sustainability and effectiveness.

**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 our community.

**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.

**THE VALUE OF VOLUNTEERS:**

- **$4.5 million** in total monetary impact
- **187,996** volunteer hours
- **$24.14** cost per unit of time for each volunteer hour

**Corporate Volunteerism** plays an integral role in United Way of Palm Beach County’s mission to change lives and shape our community.

**United We Fight. United We Win.**

For more information visit UnitedWayPBC.org
United Way’s Tocqueville Society is named after 19th century French political thinker Alexis de Tocqueville who wrote about America’s unique spirit of volunteerism. Tocqueville recognized and applauded the American desire to take a personal role in the advancement of society by combining philanthropy and service. With a minimum investment of $10,000 annually, philanthropic leaders in our community join the Tocqueville Society to collectively tackle some of Palm Beach County’s biggest issues.

Benefits of Membership

- Exclusive luncheons featuring community leaders
- Members-only, evening cocktail hour events
- Recognition in “Tocqueville Impact” quarterly newsletter
- Exclusive and customizable volunteer opportunities on request

Categories of Local Membership

- Society Members: $10,000—$14,999
- Order of Independence: $15,000—$24,999
- Order of Liberty: $25,000—$49,999
- Order of Equality: $50,000—$74,999
- Order of Fraternity: $75,000—$99,999
- National Society: $100,000—$999,999 (Annually)
- Million Dollar Roundtable: $1,000,000 and above (Total Giving)

*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. 

**FINANCIAL ACCOUNTABILITY**

**UNITED WAY OF PALM BEACH COUNTY, INC.**

**Statements of Financial Position** • June 30, 2017 and 2016

<table>
<thead>
<tr>
<th></th>
<th>2017</th>
<th>2016</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total current assets</td>
<td>$6,755,814</td>
<td>$7,829,401</td>
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<td>Total non-current assets</td>
<td>11,934,667</td>
<td>11,294,144</td>
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<tr>
<td>Total assets</td>
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<td>Total current liabilities</td>
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<td>Total non-current liabilities</td>
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<tr>
<td>Total liabilities</td>
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<tr>
<td>Net assets</td>
<td>11,853,206</td>
<td>10,633,501</td>
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<tr>
<td>Total liabilities and net assets</td>
<td>$18,690,481</td>
<td>$19,223,545</td>
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</tbody>
</table>

**Statements of Activities** • Years Ended June 30, 2017 and June 30, 2016

<table>
<thead>
<tr>
<th></th>
<th>2017</th>
<th>2016</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contributions and grants</td>
<td>$15,002,453</td>
<td>$14,789,398</td>
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<tr>
<td>Other revenues</td>
<td>403,327</td>
<td>2,198,070</td>
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<tr>
<td>Gross revenues</td>
<td>15,405,780</td>
<td>16,987,468</td>
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<tr>
<td>Program costs</td>
<td>12,295,813</td>
<td>12,698,050</td>
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<tr>
<td>Fundraising costs</td>
<td>1,557,763</td>
<td>1,555,902</td>
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<tr>
<td>Management and general costs</td>
<td>1,180,768</td>
<td>1,202,701</td>
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<tr>
<td>Total expenses</td>
<td>15,034,344</td>
<td>15,456,653</td>
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<tr>
<td>Change in net assets</td>
<td>371,436</td>
<td>1,530,815</td>
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<tr>
<td>Net unrealized gains</td>
<td>848,269</td>
<td>(89,071)</td>
</tr>
<tr>
<td>Net assets, beginning of year</td>
<td>10,633,501</td>
<td>9,191,757</td>
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<tr>
<td>Net assets, end of year</td>
<td>$11,853,206</td>
<td>$10,633,501</td>
</tr>
</tbody>
</table>

**United Way’s Tocqueville Society aims to**

**Exceptional Individuals Changing Lives and Transforming Communities**
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
Mr. Miguel Arechabala
Gene and Joyce Bolton
Mr. Larry E. Brown
Mrs. Fabiola Brumley
Mr. Dan Cane
Mrs. Deborah H. Caplan
Mr. and Mrs. Alexander R. Castaldi
Ms. Trudy Crowetz
William and Mary Donnell
Frank and Helga Doyle
Michael T. and Ruth Ann Dunn
Ray and Nancy Faloha
Mr. Alfonso “Alfy” Fanjul
Mr. Jose “Pepe” Fanjul
Madeline and Sidney Forbes
Mr. Sam A. Forrest
Mr. and Mrs. David G. Frey
Dr. Laurie J. George
Mr. Cary Ginter
Mr. and Mrs. Jeff Greene
Kenneth L. and Summer J. Groves
Mrs. Martha B. Hartfield
Dr. Rene Lerer
Robert, Jon, and Lori Levinson
H. Irwin Levy
Mr. Mark Maisto
Mr. John Marasco
Arthur and Susan Menor
Mr. and Mrs. Jack Nicklaus
Ms. Heather Nisbeth
Mr. and Mrs. James E. Perrella

ORDER OF LIBERTY
$25,000 - $49,999
Anonymous
Mr. Robert M. Beren
Mr. and Mrs. Stephen and Gabriella Demeritt
Mr. and Mrs. George Giguerre
Mr. and Mrs. Bogdan Nowak
Mr. James Robo
Mrs. Ramona Ann Spears
Mr. and Mrs. Frank E. Walsh

ORDER OF INDEPENDENCE
$15,000 - $24,999
Anonymous
Mr. and Mrs. Barney Barnett
Mr. Moray P. Dewhurst
Mr. George T. Elmore
Judith and Tom Giuffrida
Mr. Stephen C. Moore
Lee and Jenny Owen
Mr. Armando Pimentel
Mr. Robert Thibault

SOCIETY MEMBERS $10,000 - $14,999
Anonymous
Mr. Miguel Arechabala
Gene and Joyce Bolton
Mr. Larry E. Brown
MRS. Fabiola Brumley
Mr. Dan Cane
Mrs. Deborah H. Caplan
Mr. and Mrs. Alexander R. Castaldi
Ms. Trudy Crowetz
William and Mary Donnell
Frank and Helga Doyle
Michael T. and Ruth Ann Dunn
Ray and Nancy Faloha
Mr. Alfonso “Alfy” Fanjul
Mr. Jose “Pepe” Fanjul
Madeline and Sidney Forbes
Ms. Christine Petranchuk
Nancy and Steve Schwartz
Mr. Greg Seelag
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

*Deceased

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.
- Your gift is multiplied when combined with others.
- Exclusive invitation to lunches, tours and recognition events.
Join the next generation of PHILANTHROPIC LEADERS!
Behind everything we do, there are people like you who make it happen.

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.

You will CONNECT with other entrepreneurs, business people and executives who share a common goal: to make an impact. Membership creates opportunities to SERVE at volunteer projects and agency tours. By becoming a member of this select group, you will LEAD the way for others to become inspired about all the good United Way of Palm Beach County does in the community.

WOMEN UNITED
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.

United Way’s Women United strives to:
► Educate women about our community’s most pressing needs.
► Engage women as philanthropic leaders and active community investors.
► Empower women to be a part of positive change in our community.