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BOARD of Directors

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"B"ing the Best

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.

Trustworthy. Efficient. A Champion.

2016 - 17 ANNUAL INVESTMENT REPORT

UnitedWayPBC.org
477 S. Rosemary Ave., Suite 230
West Palm Beach, FL 33401
561.375.6600



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, 90% was invested right back into the community in a variety of meaningful ways, including 86 local nonprofit programs and initiatives 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 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.





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

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.



YOUR 2016-17 INVESTMENT REPORT

90% OF DONATIONS STAY LOCAL

\$15 million
raised by more than
100,000 donors

\$21 million
combined economic
community impact

90%
of the \$15 million stayed
in Palm Beach County

86 programs
and special projects
provided by 53
nonprofit partners

1 in 5
residents accessed
United Way funded
programs and services

2,100
individuals and children
received medical equipment

4,450
youth matched
with mentors

10,161
tax returns
filed for free

1.2 million
meals served
to 3,400 children

1,000+
home-bound seniors
received delivered meals

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.

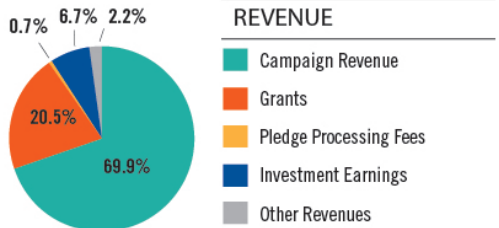
United We Fight. United We Win.

For more information visit UnitedWayPBC.org

FINANCIAL ACCOUNTABILITY



2017



2016



UNITED WAY OF PALM BEACH COUNTY, INC. Statements of Financial Position • June 30, 2017 and 2016

	2017	2016
Total current assets	\$6,755,814	\$7,929,401
Total non-current assets	11,934,667	11,294,144
Total assets	\$18,690,481	\$19,223,545
Total current liabilities	\$6,781,424	\$8,529,718
Total non-current liabilities	55,851	60,326
Total liabilities	6,837,275	8,590,044
Net assets	11,853,206	10,633,501
Total liabilities and net assets	\$18,690,481	\$19,223,545

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

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



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.



Exceptional Individuals Changing Lives and Transforming Communities

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)

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

**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.*

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

**Deceased*

ORDER OF LIBERTY

\$25,000 - \$49,999

Anonymous
 Mr. Robert M. Beren
 Mr. and Mrs. Stephen and Gabriella Demeritt
 Mr. and Mrs. George Giguere
 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 Faloon
 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. Hartfiel
 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

Ms. Christine Petranчук
 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

Members as of June 2017



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.



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.

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.



21
DEVELOPMENT
& SOCIAL
EVENTS



240+
TOTAL
MEMBERS
IN ELS



400+
VOLUNTEER
HOURS
COMPLETED



\$9,656
VALUE OF
VOLUNTEER
HOURS

WOMEN UNITED®

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.

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.

