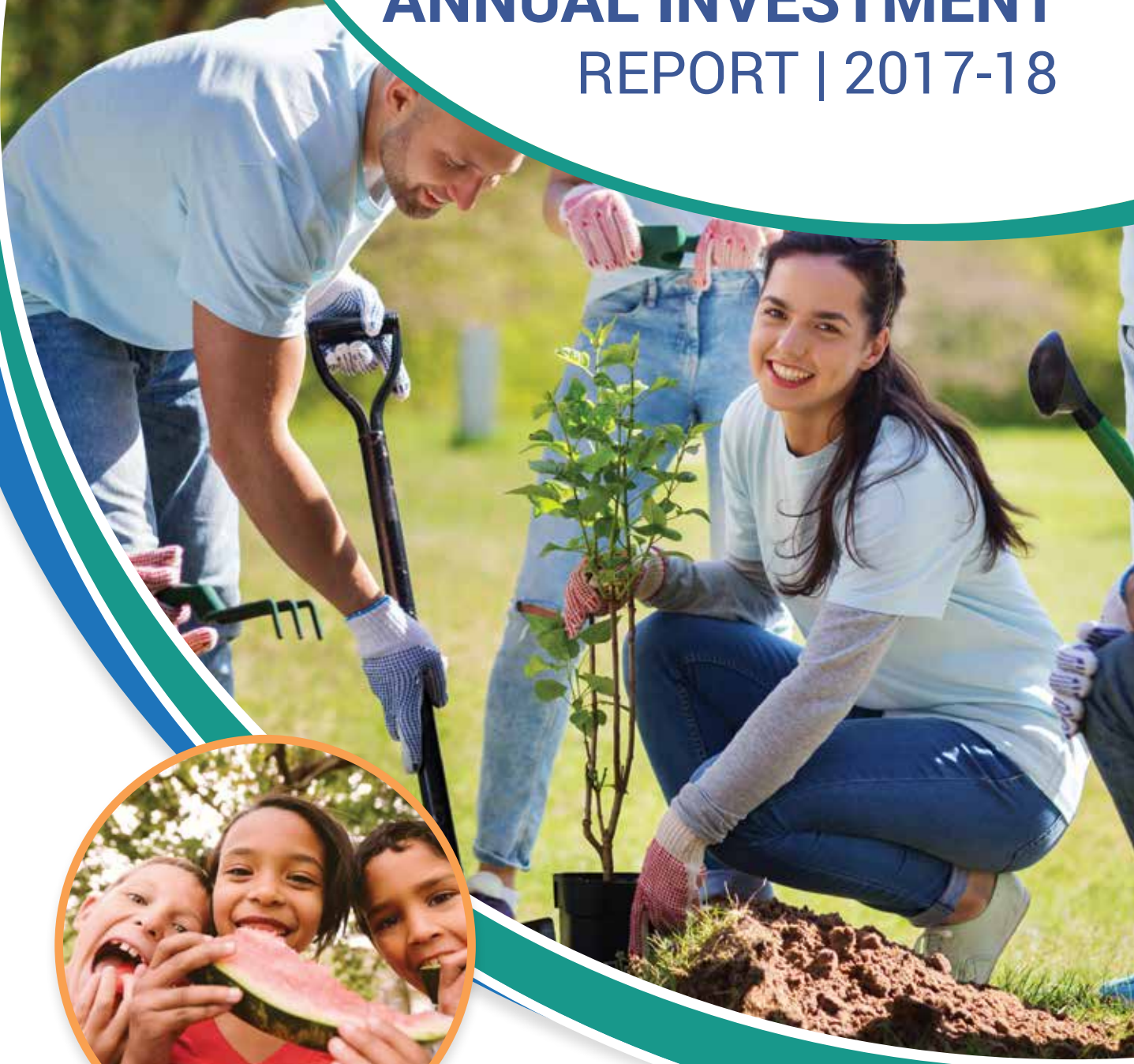


ANNUAL INVESTMENT REPORT | 2017-18



UnitedWayPBC.org



United Way
of Palm Beach County

A message from our **CEO & BOARD CHAIR**



Laurie George, Ph.D.
President & CEO



Kim Jones
Chair, Board of Directors

United Way fights so that everyone in Palm Beach County can have access to the basics: a quality education, a safe place to sleep, financial stability, good medical care, and enough to eat.

We also take a leadership role when disaster strikes. This past year, we sprang into action before, during and after Hurricanes Irma and Maria. While we were fortunate to be relatively unscathed here in Palm Beach County, there was still a lot of work to be done in our community and to assist our neighbors in the Keys, on the West Coast and in the Caribbean Islands.

The ways we collaborated with partners across all sectors of the community for Hurricane Irma relief is the same way that United Way leverages important relationships year-round to solve community issues in the most impactful way possible. Whether it is during a natural disaster, working to increase the number of seniors receiving home delivered meals or matching youth with life-changing mentors, United Way is always collaborating to make dollars go further and help even more of our residents who need it most.

This year we raised more than \$16 million dollars to meet our community's greatest needs, but what's important to note is that the actual impact and reach of those dollars exceeded \$22 million, helping a quarter of a million of our friends and neighbors.

This is one of many reasons why our United Way has been identified as one of the top 15 out of 1,200 United Ways in the United States for efficiency, performance and growth! We are very proud of all our staff and volunteers have accomplished to fulfill our mission and we couldn't have done it without the support of our generous donors!



Guiding Principles and Values

United Way staff and volunteers adhere to these guiding values:

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

YOUR 2017-18 INVESTMENT REPORT

90% OF DONATIONS STAY LOCAL

United Way increases our community's capacity to care for our neighbors.



GRADUATE & THRIVE



ACCESS TO CARE



HOUSING & HOMELESSNESS



MENTOR MATCHES



SPECIAL NEEDS



FIGHT HUNGER



FINANCIAL STABILITY

\$16.4 million

raised by more than 100,000 donors

\$22 million

combined economic community impact

90%

of the \$16.4 million stayed in Palm Beach County

86 programs

and special projects provided by 52 nonprofit partners

1 in 5

residents accessed United Way funded programs and services

2,713

individuals and children received medical equipment

4,811

youth matched with mentors

10,204

tax returns filed for free

1 million+

summer meals served to children

2,650+

home-bound seniors received delivered meals

UNITED WAY OF PALM BEACH COUNTY, INC.

Statements of Financial Position • June 30, 2018 and 2017

	2018	2017
Total current assets	\$4,997,568	\$6,755,814
Total non-current assets	12,415,201	11,934,667
Total assets	\$17,412,769	\$18,690,481
Total current liabilities	\$5,296,866	\$6,781,424
Total non-current liabilities	52,720	55,851
Total liabilities	5,349,586	6,837,275
Net assets	12,063,183	11,853,206
Total liabilities and net assets	\$17,412,769	\$18,690,481

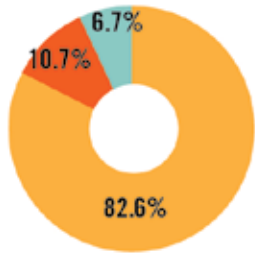
Statements of Activities • Years Ended June 30, 2018 and June 30, 2017

	2018	2017
Contributions and grants	\$16,494,901	\$15,002,453
Other revenues	369,025	403,327
Gross revenues	16,863,926	15,405,780
Program costs	14,284,749	12,295,813
Fundraising costs	1,777,941	1,557,763
Management and general costs	1,106,740	1,180,768
Total expenses	17,169,430	15,034,344
Change in net assets	(305,504)	371,436
Net unrealized gains	515,481	848,269
Net assets, beginning of year	11,853,206	10,633,501
Net assets, end of year	\$12,063,183	\$11,853,206

**The financial information presented has been derived from United Way of Palm Beach County's audited financial statements and IRS form 990. 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.*

2018

EXPENSES

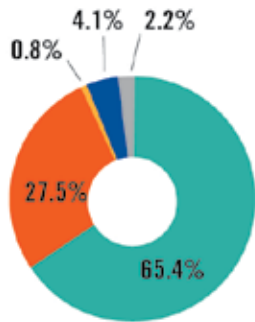


Agency Funding & Program Costs

Fundraising

Management & General

REVENUE



Campaign Revenue

Grants

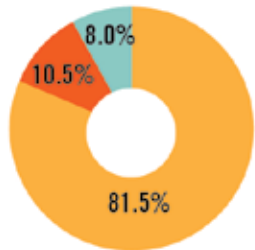
Pledge Processing Fees

Investment Earnings

Other Revenues

2017

EXPENSES

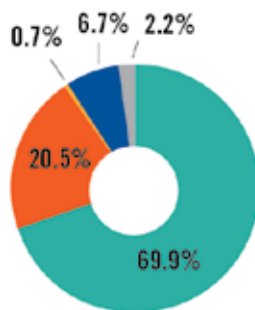


Agency Funding & Program Costs

Fundraising

Management & General

REVENUE



Campaign Revenue

Grants

Pledge Processing Fees

Investment Earnings

Other Revenues



COLLECTIVE Impact

United Way of Palm Beach County brings people, organizations and resources together, in a structured way, to achieve large-scale social change. We serve as the backbone agency for two collective impact initiatives that are aligned with our mission - Achieve Palm Beach County, focused on education and career readiness, and the other is Hunger Relief.

The Palm Beach County 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. These goals focus on the areas of Childhood Hunger, Senior Hunger, Infrastructure and the Glades region.

The Plan is data driven by various studies that mapped assets available to the food insecure such as pantries, weekend backpack programs, congregate meal sites for seniors, Women, Infants and Children (WIC) and Supplemental Nutrition Assistance Program (SNAP) participating organizations, Summer BreakSpot and many others.

**For more information visit
UnitedWayPBC.org/Hunger**



Special Needs snapshot



GOAL

Enhancing the quality of life for families with children who have a disability

\$952,436
Invested



JULIE'S STORY

United Community Options – Respite Program

Julie, a single mom working full time, was seeking help for her 4-year-old son who has sleep apnea and ADHD. She showed signs of exhaustion from going right from work to picking up her son. The staff from a local United Way funded program recognized that she needed assistance from an in-home respite program. This would allow her time to rest while a trained respite sitter would take care of her son. With the quality care her son was receiving and the new energy she had from getting more rest, she was able to find her son a specialist to assist with his sleep apnea as well as a behavioral therapist. Julie's life has changed from the support that she receives from the respite program funded by United Way of Palm Beach County.

90% of all program outcomes were met or exceeded

7
Programs



1,007
Clients served



103
Volunteers



220
Volunteer hours



\$5,432
Volunteer in-kind value

Housing & Homelessness snapshot



GOAL

Individuals and families achieve housing stability

\$487,812
Invested



ROBERT'S STORY

The Lord's Place – Operation Home Ready Program

Robert had been living on the streets for years, struggling with physical and mental health issues. Despite his challenges, Richard was determined to take control of his life. He began meeting regularly with a case manager to address his barriers to stability and enrolled in several of The Lord's Place's supportive services, where he received the appropriate medical treatment. With their support, he completed a job readiness course and continued to participate in vocational training at the Lord Place's thrift store. Robert's learning and growth enabled him to graduate from the program and become an employee there. With stable housing, steady income, employer-provided health insurance, and a newly purchased car, Robert is looking forward to continuing his success. Stories like Robert's are made possible through the funding received from United Way of Palm Beach County.

86% of all program outcomes were met or exceeded

8
Programs



1,460
Clients served



82
Volunteers



291
Volunteer hours



\$7,185
Volunteer in-kind value

Graduate & Thrive snapshot



GOAL

Support youth so they graduate from high school and succeed in life

\$1,254,359
Invested



MARIE'S STORY

Achievement Centers for Children and Families – After School Teen Program

Marie was born in Port-au-Prince, Haiti. She was just 3 years old when her family was caught in the catastrophic 2010 Haiti Earthquake. Marie and her family were left to sleep on the street immediately following the earthquake. Thankfully, arrangements were made that allowed Marie and her family to move to Delray Beach.

When she came to the Achievement Centers for Children and Families' afterschool program, it was clear that the trauma had left a mark on young Marie. It wasn't long before she began talking and letting her creative personality shine. Marie is now 12 years old, loves reading and is an Honors student and an active member of ACCF's Teen Girls' Club where she participates in life skills, etiquette, and arts workshops. ACCF and United Way are proud to have played a small role in Marie's achievements and success.

82% of all program outcomes were met or exceeded

23 Programs 20,106 Clients served 1,547 Volunteers 5,800 Volunteer hours \$143,202 Volunteer in-kind value

Access to Care snapshot



GOAL

Increase access to health insurance and comprehensive healthcare services

\$726,175
Invested



YOLANDA'S STORY

Healthy Mothers Healthy Babies – Prenatal Care Coordination Program

Yolanda came to this country alone with her two young daughters, fearing for her life because of her high-risk pregnancy. Within 24 hours of arriving, she had her first appointment with a counselor from Healthy Mothers, Healthy Babies. The organization helped her with insurance, find clothes and food for her daughters, and even located a shelter for them to stay in. Staff from the organization did everything they could to connect Yolanda and her family to more stable housing. In her words, "When I needed a village, Healthy Mothers, Healthy Babies supported me." United Way of Palm Beach County is honored to provide critical funding to this program that helps families thrive.

85% of all program outcomes were met or exceeded

12 Programs 13,644 Clients served 150 Volunteers 360 Volunteer hours \$8,888 Volunteer in-kind value

Financial Stability snapshot



GOAL Households increase income, build savings and grow assets

\$768,789
Invested



JOHN'S STORY

The Arc of the Glades – Facility-Based Employment Program

John has actively participated in programs at The Arc of the Glades for many years. To increase his employment skills and independence, John has received training on daily living skills, financial literacy, and has gained valuable work experience with the janitorial and lawn maintenance crews. He has overcome many obstacles and has not let his intellectual or physical disabilities stop him from achieving his goals. John now has his own lawn maintenance service in his neighborhood. He has been approved for Supported Living and is currently seeking affordable housing with the assistance of his coach. With the continued support of The Arc of the Glades through United Way of Palm Beach County funding, John is well on his way to making his dreams a reality.

94% of all program outcomes were met or exceeded

7 Programs 12,396 Clients served 185 Volunteers 7,261 Volunteer hours \$179,274 Volunteer in-kind value

Special Initiatives snapshot

GOAL Support initiatives providing help to individuals and nonprofit organizations during a crisis, as well as building organizational capacity

\$1,035,949
Invested



Providing Help During a Crisis

- 211 Helpline
- Disaster Relief & Recovery

Building Nonprofit Capacity

- Legal Aid Society - Nonprofit Legal Assistance Program
- Nonprofits First - Agency Accreditation
- Continuous Improvement Initiative

Mentor Center snapshot



GOAL

Support youth so they graduate from high school and succeed in life



\$1,051,577
Invested

JAMES AND CHRISTOPHER'S STORY

American Association of Caregiving Youth's Mentor Program

James was matched with his mentee, Christopher who had started high school and was falling behind academically. They met every other week after school and James also arranged for Christopher to get the tutoring help that he needed through AACY. Many times he took Christopher to his office to shadow him throughout part of the day. Christopher is now doing well in school and received a Certificate of Recognition for academic achievement. With the support of his mentor, the ACCY, and the funding provided by United Way of Palm Beach County, Christopher's life is forever changed for the better.

93% of all program outcomes were met or exceeded

14
Programs



1,088
Matches



3,313
Volunteers



156,048
Volunteer hours



\$3,852,825
Volunteer in-kind value

Fight Hunger snapshot



GOAL

Households have increased access to nutritious foods



\$489,814
Invested

DEAN'S STORY

CROS Ministries Community Food Pantry Program

Earlier this year, Dean visited a CROS Food Pantry in a bad state. He was complaining of severe headaches and had not eaten in several days. CROS Ministries volunteers were quickly able to provide him some nutritious ready-to-eat food and gave him information on a local healthcare agency to receive assistance for his headache and other ailments. A few months later, Dean paid the food pantry another visit. This time, he came to say thank you for the help he received from the volunteers at CROS Ministries. Dean now has a job and is on his way to getting back on his feet.

88% of all program outcomes were met or exceeded

8
Programs



20,762
Clients served



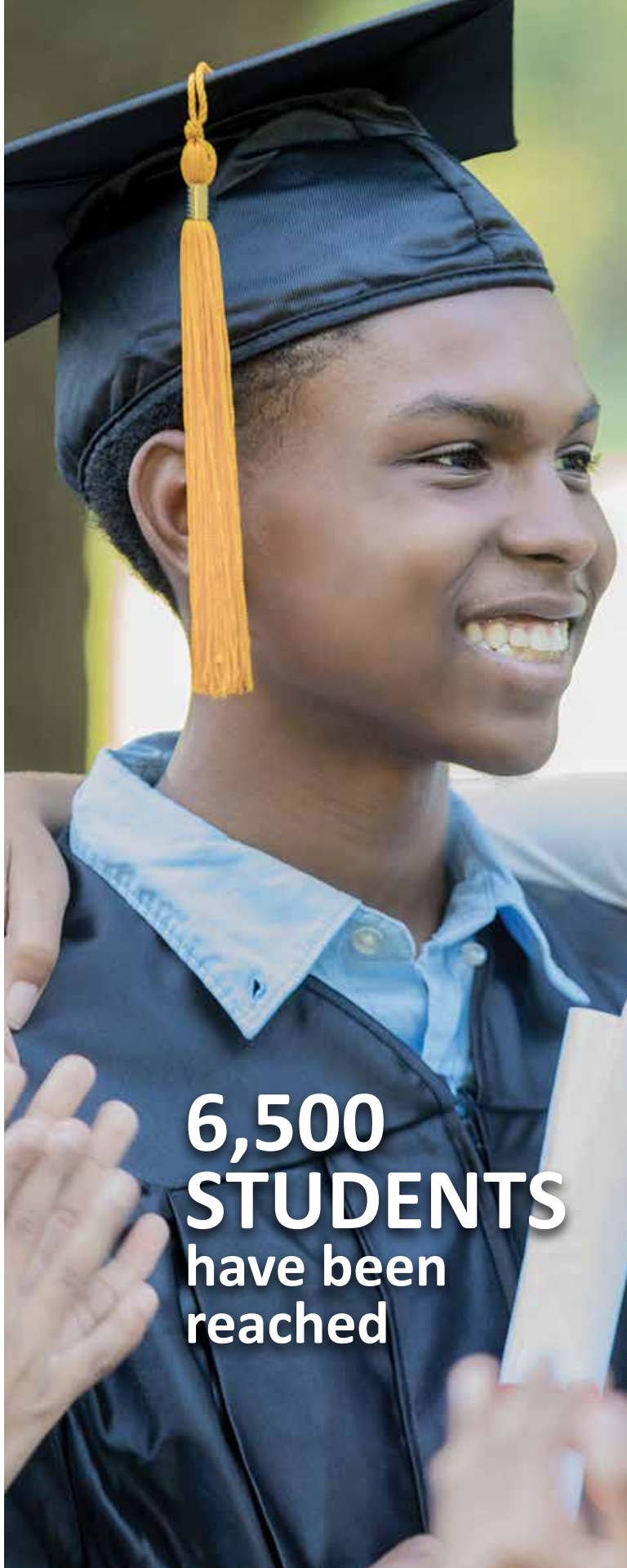
915
Volunteers



2,320
Volunteer hours



\$57,281
Volunteer in-kind value



**6,500
STUDENTS**
have been
reached



Comprised of diverse partners from across all sectors of Palm Beach County, including local business, nonprofit, government and educational entities, Achieve Palm Beach County is focused on ensuring that every student in Palm Beach County has the support he/she needs to get a post-secondary credential and be career-ready. Based on research and community input, the initial priorities of Achieve Palm Beach County include parent engagement and support, post-secondary advising for high school students, Free Application for Federal Student Aid (FAFSA) completion, and scholarships and support services for post-secondary students.

Through strategic collaboration and the hard work of community-led teams, Achieve Palm Beach County is successfully utilizing a collective impact approach to ensure post-secondary access and completion for many underserved Palm Beach County middle and high school students.

**For more information visit
AchievePBC.org**



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.

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.



CLEANING Crops



READ Across America

EXCEPTIONAL INDIVIDUALS

CHANGING LIVES AND TRANSFORMING COMMUNITIES



The Tocqueville Society is one of our community's most prestigious and effective philanthropic organizations with members investing a minimum of \$10,000 annually. Society members are leaders who collectively tackle some of Palm Beach County's biggest issues.

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)

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

ORDER OF EQUALITY

\$50,000 - \$74,999

Anonymous

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. William J. Gilbane, Jr.
 Mr. James Robo
 Mrs. Ramona Ann Spears
 Mr. and Mrs. Frank E. Walsh

**Deceased*

ORDER OF INDEPENDENCE

\$15,000 - \$24,999

Anonymous (x2)
 Ms. Trudy Crowetz
 William and Mary Donnell
 Mr. George T. Elmore
 Mr. and Mrs. Brett and Brijin Frazee
 Judith and Tom Giuffrida
 Mrs. Martha B. Hartfiel
 Ms. Karen Leikert
 Mr. and Mrs. Brand and Pamela Meyer
 Mr. Stephen C. Moore
 Lee and Jenny Owen
 Mr. Armando Pimentel
 Del and Barbara Williamson

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

Anonymous (x2)
 The Azrieli Foundation
 Mr. Miguel Arechabala
 Mr. and Mrs. Barney Barnett
 Gene and Joyce Bolton
 Mr. Larry E. Brown
 Mrs. Fabiola Brumley
 Mr. Dan Cane
 Mrs. Deborah H. Caplan
 Christine and Larry Carsman
 Mr. and Mrs. Alexander R. Castaldi
 Ms. Denise Crumm
 Ms. Julie Fisher Cummings
 Ms. Edith Di Francesco
 Frank and Helga Doyle
 Michael T. and Ruth Ann Dunn
 Ray and Nancy Faloon
 Mr. Alfonso "Alfy" Fanjul
 Mr. Jose "Pepe" Fanjul

Tricia and David Foley
 Madeline and Sidney Forbes
 Mr. Sam A. Forrest
 David and Judy Frey
 Dr. Laurie J. George
 Mr. Cary Ginter
 Kenneth L. and Summer J. Groves
 Gursahaney Family Foundation
 Lew and Sherry Hay
 John and Michelle Ketchum
 Mr. Berton Korman
 Dr. Rene Lerer
 Robert, Jon, and Lori Levinson
 Mr. Mark Maisto
 Mr. John Marasco
 Arthur and Susan Menor
 Ms. Kimberly R. Mullins
 Mr. and Mrs. Jack Nicklaus
 Ms. Heather Nisbeth

Mr. Steve Nudelberg
 Mr. and Mrs. James E. Perrella
 Ms. Christine Petranchuk
 Nancy and Steve Schwartz
 Mr. Greg Seelagy
 Mr. Eric Silagy
 Mr. Lawrence Silverstein
 Mr. Jeffrey Sopshin
 Mr. and Mrs. William Striebe
 Mr. Jim Strathmeyer
 Mr. Robert Thibault
 Mr. Paul S. Tischler
 Mr. Keith A. VanderVeen
 Mr. and Mrs. Roger Walcott
 Mr. Peter Wellman
 Meryl and Charles Witmer
 Mr. William L. Yeager

As of June 2019

United Way of Palm Beach County 2017-18 BOARD OF DIRECTORS

EXECUTIVE Committee

Kim Jones
Board Chair
Executive Compensation
Committee Chair
Celedinas Insurance Group, A Marsh &
McLennan Agency

Earnie Ellison, Jr.
Immediate Past Chair
Governance Committee Chair
Ellison Consulting Group

Frank Compiani, CPA
Chair Elect
Strategic Planning Committee Chair
RSM US LLP

Mike Bauer
Resource Development
Committee Chair
Roger Dean Chevrolet Stadium

Adam Bregman, Esq.
Legal Counsel
Shutts & Bowen LLP

Craig Jenkins, CPA
Treasurer
Finance Committee Chair
CutisCare LLP

Talla McGahee
Secretary
Publix Super Markets – Mirasol Walk

Allison Taylor
Volunteer Committee Chair
Deloitte

Meredith Rollo
Community Impact Committee Chair
Florida Power & Light Company

Fabiola Brumley
Member at Large
Bank of America

Donald Kiselewski
Member at Large
Policy Subcommittee Vice Chair
Florida Power & Light Company

Lisa Williams-Taylor, Ph.D.
Member at Large
Hunger Committee Vice Chair
Children's Services Council of
Palm Beach County

Joseph B. Shearouse, III
Member at Large
First Bank of the Palm Beaches

Laurie George, Ph.D.
President & CEO
United Way of Palm Beach County

BOARD Members

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Iberia Bank
Women United Chair

Howard Bregman, Esq.
Howard Bregman P.A.
Emeritus Director

Reverend Pamela Cahoon
Community Volunteer
Hunger Committee Chair

Daniel Cane
Modernizing Medicine, Inc.

Christopher Chase
SunTrust Bank
Finance Committee Vice Chair

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Emeritus Director

Kelly Eppy
Covelli Enterprises
Emerging Leaders Society Chair

John F. Flanigan, Esq.
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Emeritus Director

John L. Gall, Jr.
Pratt & Whitney
Labor Representative

Dr. Dennis Gallon
Community Volunteer

Chief Deputy Michael E. Gauger
Palm Beach County Sheriff's Office
Emergency Preparedness
Subcommittee Chair

Dr. Gonzalo S. La Cava
The School District of
Palm Beach County

Jon Levinson
REL Enterprises
Public Policy Subcommittee Chair

Kenton Longenecker
Pratt & Whitney

Ruth Mageria
CROS Ministries
Agency Representative

Arthur Menor, Esq.
Shutts & Bowen LLP

Greg Newara
Florida Power & Light Company
Leadership Circle Chair
Resource Development Vice Chair

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EY
Audit Committee Chair

Michael Pumo
WPEC – CBS 12/SINCLAIR WPB

Gina Sabean
PNC Wealth Management/PNC Bank

Darrell Searcy
Chandler Campbelle & Daschle

Michael Spears
NCCI
Innovation & Technology
Subcommittee Chair

David Williams
Wells Fargo
Achieve PBC Executive Champion
Liaison

Chandler Williamson
City of Pahokee

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.



United Way of Palm Beach County

Trustworthy. For 90 years, United Way of Palm Beach County has served as the trusted local leader, identifying and addressing our community's most critical needs.

Efficient. Our team of community investment experts monitor United Way funded programs, ensuring targeted results are achieved. Donors can be assured that their dollars are being put to work in the best way possible, where they are needed the most.

A Champion. We fight for those who do not have a voice and support the nonprofits that serve them. By uniting key stakeholders and local leaders, we provide strategic solutions to community challenges.

[UnitedWayPBC.org](https://www.UnitedWayPBC.org)

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