



2018-19 ANNUAL INVESTMENT REPORT

CONNECTING OUR COMMUNITY

UnitedWayPBC.org



United Way
of Palm Beach County

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.

BOARD OF DIRECTORS

A message from our CEO & BOARD CHAIR



Laurie George, Ph.D.
President & CEO



Kim Jones
Chair, Board of Directors

As our 90th anniversary year comes to a close, United Way of Palm Beach County has much to celebrate! Since 1929, our organization has raised and distributed more than \$316 million in Palm Beach County, impacting 1 in 5 residents in our community. We have also achieved multiple prestigious third-party accreditations in our 90th year.

United Way of Palm Beach County holds five accreditations that demonstrate its commitment as a Trustworthy and Efficient financial steward of our community's generous donations and adherence to industry best practices. By maintaining our Nonprofits First Excellence certification, United Way promotes sound business practices as an additional assurance to donors and community stakeholders. United Way was also awarded Platinum status from Guidestar, a 4-star Charity Navigator accreditation, membership in the United Way Worldwide network, and successfully meets the 20 Standards for Charity Accountability from the Better Business Bureau's Wise Giving Alliance.

United Way of Palm Beach County is a Champion for our community - we listen to emerging needs and unite our community's resources to create sustainable change. We invite you to continue to support our mission to ensure that every Palm Beach County resident has access to the basics: a quality education, a place to live, financial stability, good medical care, and enough to eat.

EXECUTIVE Committee

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

Earnie Ellison, Jr.
Immediate Past Chair
Ellison Consulting Group

Frank Compiani, CPA
Chair Elect
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
CutisCare LLP

Talla McGahee
Secretary
Publix Super Markets

Allison Taylor
Audit 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

Jennifer Brancaccio
Women United Chair
IBERIABANK

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

Reverend Pamela Cahoon
Hunger Committee Chair
Community Volunteer

Christopher Chase
Leadership Circle Chair
SunTrust Bank

Juan Cocuy, CPA
Templeton & Company

George T. Elmore
Emeritus Director
Hardrives Inc.

John Fischetti
Community Impact Committee
Vice Chair
Sikorsky Aircraft

Clinton B. Forbes
Palm Beach County Government

Brett Frazee
Enterprise Holdings

John F. Flanigan, Esq.
Emeritus Director
Haile, Shaw & Pfaffenberger, P.A.

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

Dennis Gallon, Ph.D.
Community Volunteer

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

Keith Oswald
The School District
of Palm Beach County

Jon Levinson
Public Policy Subcommittee Chair
REL Enterprises

Kenton Longenecker
Community Volunteer

Ruth Mageria
Agency Representative
CROS Ministries

Arthur Menor, Esq.
Shutts & Bowen LLP

Greg Newara
Shermco Industries

Heather Nisbeth
EY

Michael Pumo
Sinclair Broadcast Group

Gina Sabeau
PNC Wealth Management/PNC Bank

Darrell Searcy
Chandler Campbelle & Daschle

Danielle Skorski
Emerging Leaders Society Chair
The Breakers Palm Beach

Michael Spears
Innovation & Technology
Subcommittee Chair
NCCI

David R. Williams
Achieve PBC Executive Champion
Liaison
Wells Fargo

Chandler Williamson
City of Pahokee

FINANCIAL ACCOUNTABILITY

UNITED WAY OF PALM BEACH COUNTY, INC.

Statements of Financial Position • June 30, 2019 and 2018

	2019	2018
Total current assets	\$5,402,032	\$4,997,568
Total non-current assets	12,606,055	12,415,201
Total assets	\$18,008,087	\$17,412,769
Total current liabilities	\$6,258,435	\$5,296,866
Total non-current liabilities	48,789	52,720
Total liabilities	3,122,864	5,349,586
Net assets	14,885,223	12,063,183
Total liabilities and net assets	\$18,008,087	\$17,412,769

Statements of Activities • Years Ended June 30, 2019 and June 30, 2018

	2019	2018
Contributions and grants	\$15,842,396	\$16,494,901
Other revenues	604,101	369,025
Gross revenues	16,446,497	16,863,926
Program costs	11,266,560	14,284,749
Fundraising costs	1,837,094	1,777,941
Management and general costs	777,030	777,030
Total expenses	13,880,684	17,169,430
Change in net assets	2,565,813	(305,504)
Net unrealized gains	256,227	515,481
Net assets, beginning of year	12,063,183	11,853,206
Net assets, end of year	\$14,885,223	\$12,063,183

*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.

Trustworthy.
Efficient.
A Champion.

United Way of Palm Beach County holds five accreditations that demonstrate its commitment as a Trustworthy and Efficient financial steward of our community's generous donations and adherence to industry best practices.



2018-19 INVESTMENT REPORT



GRADUATE & THRIVE



ACCESS TO CARE



HOUSING & HOMELESSNESS



MENTOR MATCHES



SPECIAL NEEDS



FIGHT HUNGER



FINANCIAL STABILITY

We are one of the largest fundraisers in South Florida, helping to support 100 vital programs and initiatives provided by our community partners. When you make a contribution to United Way of Palm Beach County your gift goes further and makes a greater impact. We combine your dollars with the donations and resources of others and strategically invest in programs that address our community's most critical needs.

\$16.4 million

raised through
generous donations

90%

of all funds raised stayed
in Palm Beach County

100 programs

and special initiatives
provided by 56
nonprofit partners

1 in 5

residents accessed
United Way funded
programs and services

2,877

individuals and children
received medical
equipment

5,411

youth matched
with mentors

10,003

tax returns
filed for free

1 million+

summer meals
served to children

1,961

home-bound seniors
received delivered meals

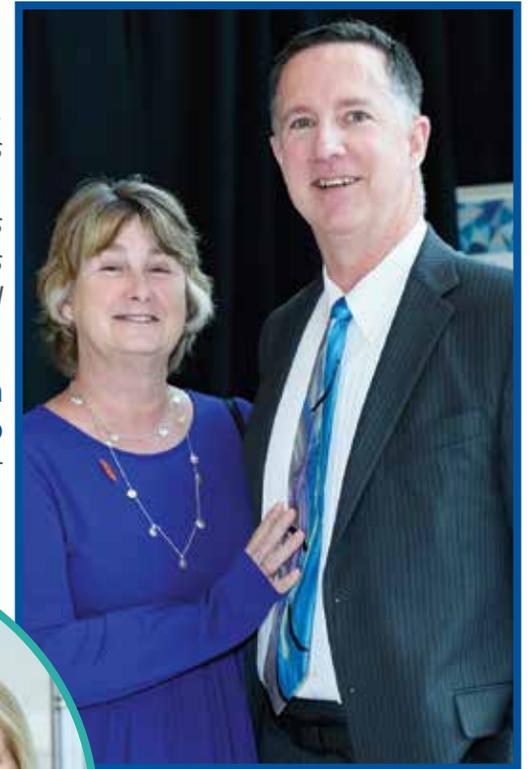


United Way's Tocqueville Society is named after 19th century French philosopher Alexis de Tocqueville, who wrote about America's unique spirit of volunteerism. Tocqueville recognized and applauded the American desire to take a personal role in the advancement of society by combining philanthropy and 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.

To learn more about our Tocqueville Society, please visit:
UnitedWayPBC.org/Tocqueville-Society

"United Way is a trustworthy, strategic champion for individuals and families in Palm Beach County. I am confident in United Way's ability to identify critical needs in our community and to find solutions to address those needs."

Mike and Ruth Ann Dunn
Wells Fargo
Tocqueville Society Chair



Brett and Brijin Frazee
Enterprise Holdings
Tocqueville Society Vice Chair
United Way of Palm Beach County
Board Member

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 (Cumulative 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

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

ORDER OF EQUALITY

\$50,000 - \$74,999

Anonymous
Mr. and Mrs. Bob & Peggy Walter

ORDER OF LIBERTY

\$25,000 - \$49,999

Anonymous
Mr. Robert M. Beren
Mr. and Mrs. Stephen &
Gabiella Demeritt
Mr. and Mrs. George & Mary Giguere
Mr. and Mrs. William J. Gilbane, Jr.
Mr. James Robo
Mrs. Ramona Ann Spears
Mr. and Mrs. Frank E. Walsh

ORDER OF INDEPENDENCE

\$15,000 - \$24,999

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

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

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

Mr. and Mrs. David & Tricia Foley
Mr. and Mrs. Sidney & Madelin Forbes
Mr. Sam A. Forrest
Mr. and Mrs. David & Judy Frey
Mr. Jim Sahnger & Dr. Laurie J. George
Mr. and Mrs. Kenneth L. &
Summer J. Groves
Gursahaney Family Foundation
Mr. and Mrs. Lew & Sherry Hay
Mr. George M. Jamgochian
Mr. and Mrs. John & Michelle Ketchum
Mr. Berton Korman
Dr. Rene Lerer
Mr. and Mrs. Jon & Lori Levinson
Mr. Robert Levinson
Mr. Brinck Lowery
Mr. Mark Maisto
Mr. John Marasco
Mr. and Mrs. Arthur & Susan Menor

Ms. Kimberly R. Mullins
Mr. and Mrs. Jack Nicklaus
Ms. Heather Nisbeth
Mr. and Mrs. James E. Perrella
Ms. Christine Petranчук
Mr. and Mrs. Steve & Nancy Schwartz
Mr. Eric Silagy
Mr. Lawrence Silverstein
Mr. Jeffrey Sopshin
Mr. James M. Strathmeyer, Jr.
Mr. and Mrs. William Striebe
Mr. Paul S. Tischler
Mr. Keith A. VanderVeen
Mr. and Mrs. Roger Walcott
Mr. Peter Wellman
Mr. and Mrs. Charles & Meryl Witmer
Mr. William L. Yeager



Chris Chase
SunTrust Bank

Leadership Circle Chair
United Way of Palm Beach County
Board Member

“The members of United Way of Palm Beach County’s Leadership Circle make a big impact on our community. With over 1,400 members each donating \$1,000 or more, this is the best way I know to help our neighbors when they are hungry, don’t have a place to sleep, or need support to make ends meet.”

Community Impact is United Way’s business. By making a Leadership Circle gift, you join the thousands of other concerned donors who trust in United Way to produce smart solutions and meet the needs of the community.

A Leadership Circle 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.
- ▶ Exclusive invitation to lunches, tours and recognition events.



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.



CLEANING Crops

MAKE AN IMPACT!

At exclusive events, ELS members **CONNECT** with other entrepreneurs, business people and executives who share a common goal: to make an impact. Being a part of ELS creates opportunities to **SERVE** at volunteer projects and agency tours. By joining 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.



READ Across America



Celebrating our Growing Volunteers!

Last year, 8,133 volunteers helped make our community flourish!

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.

To search our volunteer opportunities, please visit: UnitedWayPBC.org



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.

Outstanding Corporate Volunteer Participation!

Bank of America

Florida Power & Light Company

Lexis Nexis

National Tire Wholesale

Wells Fargo





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

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