

2019-20

ANNUAL REPORT



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West Palm Beach, FL 33401

561.375.6600



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

We frequently use “unprecedented” to describe the havoc that the economic impact of the coronavirus inflicted on our community this year. Despite the uncertainty, United Way of Palm Beach County and our partners were nimble and resilient. We met adversity head on by pivoting programs to feed families, keep roofs over heads, and provide access to health care services.

As the need for food grew exponentially, the generosity from our community was also unprecedented. We saw both our long-time and new supporters go above and beyond to make a greater difference, and some selflessly gave their last ten dollars to help others.

United Way of Palm Beach County raised more than \$1.5 million for our COVID-19 Response Fund, which helped 84 agencies continue to provide critical services to more people than ever before, distributed PPE and hygiene supplies, and increased nonprofits’ capacities to connect people to resources.

The various challenges we faced this year may fade from our memories, but we will never forget the authentic compassion and collaboration from you, our community of Champions. Thank you for being our partner in impact and in hope this unprecedented year.

“Leadership is about VISION
and RESPONSIBILITY, not power.”

- Seth Berkley

Thank you to our Board of Directors for being Champions for PBC every day!

This group of dedicated volunteers helped our organization navigate the challenges of a pandemic and reach new levels of impact in our community.

EXECUTIVE Committee

Kim Jones

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Celedinas Insurance Group,
A Marsh & McLennan Agency

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Immediate Past Chair
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Chair Elect
RSM US LLP

Mike Bauer

Resource Development
Committee Chair
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Adam Bregman, Esq.

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Shutts & Bowen LLP

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Treasurer
CutisCare LLP

Talla McGahee

Secretary
Publix Super Markets

Allison Taylor

Volunteer Center Committee Chair
Deloitte

Meredith Rollo

Community Impact Committee Chair
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Fabiola Brumley

Member at Large
Bank of America

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Member at Large
Florida Power & Light Company

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Member at Large
Children's Services Council of
Palm Beach County

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Member at Large
First Bank of the Palm Beaches

Laurie George, Ph.D.

President & CEO
United Way of Palm Beach County

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Women United Chair
IBERIABANK

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Emeritus Director
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Vice Chair
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Clinton B. Forbes

Palm Beach County Government

Brett Frazee

Enterprise Holdings

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Pratt & Whitney

Dennis Gallon, Ph.D.

Community Volunteer

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Emergency Preparedness
Subcommittee Chair
Palm Beach County Sheriff's Office

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Public Policy Subcommittee Chair
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Kenton Longenecker

Community Volunteer

Ruth Mageria

Agency Representative
CROS Ministries

Arthur Menor, Esq.

Shutts & Bowen LLP

Greg Newara

Shermco Industries

Heather Nisbeth

EY

Keith Oswald

The School District
of Palm Beach County

Michael Pumo

Sinclair Broadcast Group

Gina Sabeau

PNC Wealth Management

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

United Way of Palm Beach County

FINANCIALS

Statements of Financial Position • September 30, 2020 and June 30, 2019

	2020	2019
Total current assets	\$3,296,139	\$5,402,032
Total non-current assets	14,028,138	12,606,055
Total assets	\$17,324,277	\$18,008,087
Total current liabilities	\$5,013,923	\$6,258,435
Total non-current liabilities	46,120	48,789
Total liabilities	5,060,043	3,122,864
Net assets	12,264,234	14,885,223
Total liabilities and net assets	\$17,324,277	\$18,008,087

Statements of Activities • Years Ended September 30, 2020 and June 30, 2019

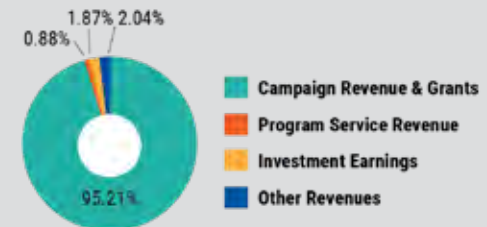
	2020	2019
Contributions and grants	\$16,898,316	\$15,842,396
Other revenues	405,745	604,101
Gross revenues	17,304,061	16,446,497
Program costs	15,192,569	11,266,560
Fundraising costs	1,390,674	1,837,094
Management and general costs	742,126	777,030
Total expenses	17,307,369	13,880,684
Change in net assets	(3,308)	2,565,813
Net unrealized gains	427,486	256,227
Net assets, beginning of year	11,840,056	12,063,183
Net assets, end of year	\$12,264,234	\$14,885,223

2020

EXPENSES



REVENUE

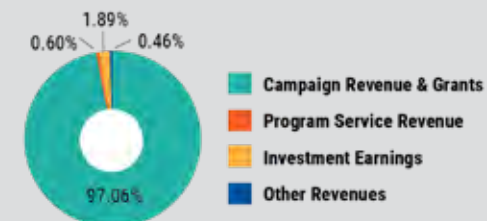


2019

EXPENSES



REVENUE



*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.

Community INVESTMENT

1 in 5 PBC residents
uses a UNITED WAY
funded program.

We are one of the largest fundraisers in South Florida, helping to support **110 vital programs** and initiatives provided by our community partners.

EMPOWERING HEALTHY LIVES

Improving access to health care and promoting quality of life for people with disabilities.



ACCESS
TO CARE



SPECIAL
NEEDS

17,671 CLIENTS SERVED

1,325 VOLUNTEER HOURS

22 FUNDED PROGRAMS

STABILIZING FAMILIES

Providing resources for financial stability, housing support, and hunger relief.



FIGHT
HUNGER



HOUSING &
HOMELESSNESS



FINANCIAL
STABILITY

2,217,779 CLIENTS SERVED

(Includes duplicates)

6,436 VOLUNTEER HOURS

36 FUNDED PROGRAMS

HELPING YOUTH SUCCEED

Helping children and youth achieve their potential through educational assistance and mentors.



MENTOR
MATCHES



GRADUATE &
THRIVE

6,581 CLIENTS SERVED

147,254 VOLUNTEER HOURS

45 FUNDED PROGRAMS

HELP DURING A CRISIS & NONPROFIT CAPACITY BUILDING } 7 FUNDED PROGRAMS



COMMUNITY NEEDS

200K

PBC Residents Experiencing Hunger

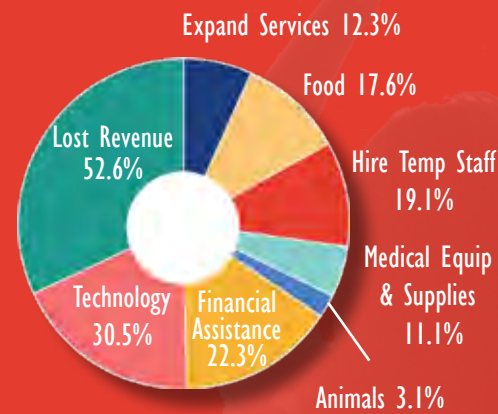
\$28.9M

Total Aid Requested in PBC

551

Nonprofit Requests for Aid

REQUESTS FROM PBC NONPROFITS



United Way and nine other funders in Palm Beach County established the Coronavirus (COVID-19) Relief and Recovery application process to provide assistance to nonprofits in Palm Beach and Martin Counties whose staff, services and clients have been impacted by this pandemic.

COVID-19 RESPONSE FUND

FOR PALM BEACH COUNTY

United Way of Palm Beach County awarded \$1,286,581 in grants to 84 agencies that provided food, shelter, and health care to residents during this time.



Created the Palm Beach County Food Finder Map to help people easily locate free food and hot meals.



Expanded home delivered meals to vulnerable seniors.



Supported 50+ mentor programs and 4,500 mentor matches with best practices for virtual mentorship.



Provided funding to purchase hot spots for 700 students in The Glades

UWPBC INVESTMENTS

\$1.5M

Total Raised by UWPBC

84

Nonprofits Receiving Grants from UWPBC*

* As of 9/30/20

\$1.2M

Total Funding Awarded by UWPBC

695

Volunteer Hours



Thank you to our 50+ Community Partners who donated over \$1.38 million dollars to our COVID-19 Response Fund!

To view a complete list of these partners, please visit: UnitedWayPBC.org

We are Stronger TOGETHER

March 2020 changed our lives. Our community's needs surged due to the economic impact of COVID-19. Unemployment soared, many turned to food pantries for the first time, stable housing was threatened, and schools forced to transition to virtual learning. Many nonprofit agencies were forced to shut their doors and quickly adjusted their programs to meet social distancing guidelines to provide critical resources.

COVID-19 amplified United Way of Palm Beach County's mission to ensure everyone in the community has access to the basics: a quality education, a place to live, financial stability, good medical care, and enough to eat.



As a trustworthy community champion, we went to work doing what we do best. From a remote environment, our team immediately tackled COVID-19 head on convening funders, businesses and nonprofits to provide a county-wide response to needs.

Thank you to our donors, volunteers, corporate and nonprofit partners who partnered with us to bring help and hope to our neighbors in need.



1,000+ Stars of Hope,
Bookmarks, and Thank You
Cards Received!



Volunteers gave 695 hours of their time to help distribute food, over \$330,000 worth of PPE, and other hygiene items to our nonprofit partners and our neighbors in need.

The Value of **VOLUNTEERING**

Last year, 6,033 volunteers gave their valuable time to help 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. Last year, United Way of Palm Beach County volunteers contributed **157,571 hours** to help our community flourish, bringing an in-kind value of **over \$4 million** to our local nonprofit partners providing critical services.

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

"Be the CHANGE you want to see in the world."

- Gandhi



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.

Through our Volunteer Income Tax Assistance (VITA) program more than 165 volunteers filed 6,821 tax returns for free in 2019!



Exceptional INDIVIDUALS



"I've been so fortunate to participate (as a United Way volunteer and donor) for over 20 years now and in five different cities. In that time, it has been very rewarding to serve on many local United Way committees and at local events. In addition, I've been able to support the Tocqueville Society for most of the last decade."

Brett Frazee, Tocqueville Society Chair



Brett and Brijin Frazee
Enterprise Holdings

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

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

**"Philanthropy requires THOUGHT,
ACTION and PASSION."**

- Robert Payton



“Never doubt that a small group of thoughtful, committed CITIZENS can CHANGE THE WORLD.”

— Margaret Mead



Chris Chase
Trustee

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.”

During COVID, our affinity groups pivoted to continue to provide volunteer, networking, and professional development opportunities.



EMERGING | LEADERS | SOCIETY



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.



21
ELS
EVENTS



350+
ELS
MEMBERS



168+
VOLUNTEER
HOURS



\$4,409
VALUE OF
VOLUNTEERS

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.

WOMEN UNITED



11
WU
EVENTS



450+
WU
MEMBERS



78+
VOLUNTEER
HOURS



\$2,040
VALUE OF
VOLUNTEERS



Trustworthy. For more than 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](#)

UnitedWayPBC.org