

# BOLD AND UNITED

We are the gamechangers

Identify. Evaluate. Invest.



Together  
We Win



#gamechangers

# Our Message to You

## Let's face it.

These days, hard work is not enough for many struggling individuals and families. Many of our neighbors, co-workers and friends live in a never-ending cycle of constant worry. Lack of education or needed job skills, a financial emergency, or the inability to access health care will be the last straw that sends everything tumbling down. There is not a quick fix to create lasting change, not just one answer or one way to help our neighbors overcome daily struggles.

This past year, we asked you to join us at the table and you were there with us as we boldly engaged in our mission to eliminate poverty. From raising \$1,358,000, to funding agencies working together in new and fresh ways, to serving the community with impactful programs like Season of Sharing and VITA, a free tax assistance program, we have been guided by BOLD GOALS that will eliminate poverty in Charlotte County. These are vital investments that breathe life into a strong, sustainable community. We are leading this effort and we need you on our team.

The pages in this report are a reflection of you, our donors, our incredible non-profit partners, our volunteers and businesses. Consider this a step forward as we become more than hand raisers, we become the game changers.

We are the **stop-talking-start-doing-band-together-and-take-on-the-impossible-task-masters**.

To live better, we must **BOLDLY** Live United.

## Your United Way Board Members

**Julie Mathis**, President  
Charlotte County  
Chamber of Commerce

**Sue Sifrit**, Past President  
Retired Charlotte  
County School Board

**Harvey Goldberg**, Treasurer  
Former Mayor  
City of Punta Gorda

**W. Kevin Russell, P.A.**  
Development Co-Chair  
Attorney at Law

**Vanessa Oliver**  
Development Co-Chair  
Ambitrans Medical Transport

**Roger Eaton**  
Community Impact Chair  
Charlotte County  
Clerk of the Court

**Justin Brand**  
Charlotte Harbor Event Center

**Thomas Cappiello**  
Peace River Team  
at Morgan Stanley

**Kristin Cardona**  
Port Charlotte  
Rehabilitation Center

**Steve Dionisio**  
Charlotte County Public Schools

**Bill Hawley**  
Fawcett Memorial Hospital

**Rob Lee**  
Sun Coast Media Group

**Lucienne Pears**  
Charlotte County Economic  
Development

**Thomas Rice** Emeritus

**Kathy Silverberg** Emeritus

**Leah Valenti**  
District Director for  
Congressman Tom Rooney

**Steve Vito**  
SunTrust Bank

**Patrice Weston**  
State Farm Insurance

**Phil Wickstrom**  
City of Punta Gorda

**Randy Williams**  
Publix Supermarkets, Inc.

**Dr. Denis Wright**  
Florida SouthWestern  
State College-Charlotte Campus

## At A Glance

Funded 6 collaborative programs (18 nonprofit partners) that address our Bold Goals.

Created Women United - focused on family sustainability and school readiness in Charlotte County.

# BOLD GOAL: FINANCIAL STABILITY

We envision a community where financial stability is available for everyone.

**My husband was arrested for domestic violence.** Here I was with three children under five years of age who had witnessed some awful abuse. Two of them were acting out and displaying signs of anxiety.

Thankfully, I was referred to the **Mentoring for Financial Success** program and now I am working full-time, studying to get my driver's license, and looking forward to going to school to become a nurse. My children have calmed down. My mentor referred me to an agency that is helping them be happy and functioning at age-appropriate levels. I now know I can have financial stability and take care of my family.

**UNITED, WE ARE HELPING  
KAREN ACHIEVE FINANCIAL  
SUCCESS THROUGH ONE ON ONE  
MENTORING AND SUPPORT.**

## MENTORING FOR FINANCIAL SUCCESS PARTNERS

Children's Network of Southwest Florida, Drug Free Charlotte County, Charlotte County Healthy Start, Healthy Families

# BOLD GOAL: EDUCATION

We envision a community where at least 70% of Charlotte County 3rd grade students are reading at grade level or beyond by June 2022.

**My beautiful 5-year-old daughter Kimberly is my world.** She was so excited to start kindergarten in the fall. A specialist with **Charlotte County Reads** program determined that Kimberly was below average for her age in pre-literacy development.

The specialist gave my family books and coached me on having a good reading experience with Kimberly. Bed-time reading and cooking with recipes are now some of our favorite activities.

After six months, Kimberly's score has risen to average. Now I can be excited for my little girl and look forward to a bright future for her!

\*These stories are fictional composites of clients served by our funded partners.

**UNITED, WE ARE PROVIDING  
KIMBERLY AND HER FAMILY  
WITH ALL THE TOOLS NECESSARY  
TO BE A GOOD READER IN  
ELEMENTARY SCHOOL.**

## CHARLOTTE COUNTY READS PARTNERS

Early Learning Coalition, Big Brothers Big Sisters, Boys & Girls Club, SKY Family YMCA - Charlotte County

## At A Glance

### Volunteer Income Tax Assistance (VITA) Program

Prepared taxes AT NO CHARGE for over 350 local residents, average adjusted gross income \$22,346 and total tax refunds at \$343,751.

### Season of Sharing Grant

\$600,000 helped 679 families stay in their homes. Thankful to Sarasota Community Foundation for this partnership to pay rent, mortgage and/or utilities.

# BOLD GOAL: HEALTH AND WELLNESS

We envision a community where ALL children, adults and senior citizens have access to services that improve their well-being, and therefore the overall health of Charlotte County.

I was laid off from my company and struggled to make ends meet...then my wife tragically died. My life went on a downward spiral. I got depressed and worse yet, homeless. My physical and mental illnesses made things so much more difficult. I had no idea the amount of time and hard work that it would take me to recover and get back to a normal life.

Through the **Ending Chronic Homelessness** program I have accomplished so much, and feel proud that I am now stable and living in permanent housing. If it wasn't for the community agencies giving me this opportunity, I don't know where I would be today.

**UNITED, WE ARE ADDRESSING WALTER'S COMPLEX MEDICAL AND PSYCHIATRIC ILLNESS AND HELPING HIM TO FIND PERMANENT HOUSING.**

## ENDING CHRONIC HOMELESSNESS PARTNERS

Virginia B. Andes Volunteer Community Clinic, Charlotte  
County Homeless Coalition, Charlotte Behavioral Healthcare

**UNITED, WE ARE SUPPORTING MARILYN AND HER HUSBAND TO MANAGE THE HEALTH AND NUTRITION NEEDS OF ALZHEIMER'S DISEASE.**

**Her name is Marilyn and she's the love of my life.** We've been married for 57 years. She raised our three children and took care of the household. Above all, she was an outstanding cook. Most of our family memories revolved around Marilyn's meals, picnics, barbecues and holidays. However, things have changed. Marilyn has Alzheimer's and I fear I can't take care of her or provide for her needs.

A program specialist told me about **Senior Nutrition and Care** in our community. We now have healthy meals delivered to our home to eliminate some of the stress. I have a lot to learn and will do anything for Marilyn, but this is one thing that I don't have to worry about now.

## SENIOR NUTRITION AND CARE (SNAC) PARTNERS

Senior Friendship Centers, Alzheimer's Association

\*These stories are fictional composites of clients served by our funded partners.

At A Glance

Invested in and co-founded Together Charlotte, a collaborative coalition that champions high quality health and human services right here in Charlotte County.

**I was dismayed. Justin was enrolled in my class for four-year olds and had been coming to school with unhealthy lunches for awhile.** In the month that Justin had been in my class, he had daily meltdowns. He was easily frustrated and his tantrums made other children afraid of him so he had no friends. Justin's parents didn't know what to do.

Through the **Eat Well Live Well** program, Justin's mother is learning to prepare healthy, wholesome delicious foods at home on a tight budget. I'm noticing Justin is calmer and better able to respond to activities and interact with the other kids. Justin is getting the nutrition he needs and has moved from simply surviving to growing and thriving!

**UNITED, WE ARE  
ENCOURAGING JUSTIN  
AND HIS PARENTS TO  
ADDRESS BEHAVIOR ISSUES  
AND IMPROVE LEARNING  
BY MAKING HEALTHY  
MEAL CHOICES.**

**EAT WELL LIVE WELL: HEALTHY CHOICES  
FOR FAMILIES PARTNERS**

Early Learning Coalition, Center for Abuse and Rape  
Emergencies, Drug Free Charlotte County,  
Charlotte County Healthy Start, Healthy Families

**UNITED, WE ARE  
EDUCATING RICHARD AND  
PROVIDING RESOURCES FOR HIS  
CHILDREN TO ENSURE THEY  
ARE LEARNING AT THEIR  
RESPECTIVE GRADE LEVEL.**

**BUILDING SUCCESSFUL FUTURES TOGETHER PARTNERS**

New Operation Cooper Street, Charlotte Local Education  
Foundation, Charlotte County Imagination Library

**I felt like a failure, a 28 year old single dad with three small children.** I was working hard at two minimum-wage jobs but could barely make it. Things got worse when my car broke down. I had to push myself and step up to make a change, so I decided to study for the GED.

The folks at **Building Successful Futures Together** helped because I could attend classes in the evenings or on Saturdays when I was off work. Charlotte Transit vouchers helped with rides, and a scholarship paid for the classes and GED tests.

I feel like I have a chance now. I want to show my children that with hard work and determination, we can have a better life. I can be the dad I always dreamed of being for my children.

\*These stories are fictional composites of clients served by our funded partners.


**At A Glance**

Partnered with Harry Chapin Food Bank to provide monthly Mobile Food Pantry services and with Fawcett Memorial Hospital to provide \$5,000 in school uniforms for children who cannot afford them at a local high poverty elementary school.

# HOW WE GET THE GREATEST RETURN ON YOUR INVESTMENT



Identify community needs and goals through the lens of eliminating poverty.



Invest your donations in the programs that best address these complex problems.


Lead collaborative partnerships to develop much-needed programs.

#gamechangers



Invite volunteers from all walks of life to assess and rate these programs.

Create game-changing programs that are sustainable, scalable and measurable.



## TOGETHER WE WILL ELIMINATE POVERTY

# Consolidated Statement of Financial Position as of March 31, 2017

ASSETS	2017	2016
<b>Current Assets</b>		
Cash and cash equivalents	\$ 570,605	\$ 394,924
Pledges receivable-net allowance for uncollectible pledges	242,195	286,365
Prepaid insurance	1,974	1,523
Endowment fund investments	381,602	345,056
<b>Total Current Assets</b>	<b>1,196,376</b>	<b>1,027,868</b>
<b>Noncurrent Assets</b>		
Property and equipment-net of accumulated depreciation	527,352	546,832
Total Noncurrent Assets	527,352	546,832
<b>Total Assets</b>	<b>\$1,723,728</b>	<b>\$1,574,700</b>
<b>LIABILITIES AND NET ASSETS</b>		
<b>Current Liabilities</b>		
Accounts and taxes payable	\$ 8,585	\$ 13,446
Accrued agency allocations	300,000	234,135
Grants payable	325,000	296,094
Security deposits	2,000	1,000
Current maturities of long-term debt	24,194	22,940
<b>Total Current Liabilities</b>	<b>659,779</b>	<b>567,615</b>
<b>Long Term Liabilities</b>		
Long-term debt – net of current maturities	338,975	362,842
Total Long Term Liabilities	339,975	362,842
<b>Total Liabilities</b>	<b>998,754</b>	<b>930,547</b>
<b>Net Assets</b>		
Unrestricted assets	709,675	632,724
Temporarily restricted	15,299	11,519
<b>Total Net Assets</b>	<b>724,974</b>	<b>644,243</b>
<b>Total Liabilities and Net Assets</b>	<b>\$1,723,728</b>	<b>\$1,574,700</b>



## Local impact in Charlotte County MYTH OR REALITY?

### MYTH

Donations don't stay here.

### REALITY

**99%** of the donations we collect stay right here to address the needs of Charlotte County residents - just **1%** goes to United Way Worldwide.

### MYTH

A large portion of donations are used for overhead.

### REALITY

Our current overhead rate is **5.44%**, thanks in large part to a total of **469** hard-working volunteers who last year donated time valued at **\$153,892**.

### MYTH

All the United Way of Charlotte County does is collect money and pass it out to other non-profit agencies.

### REALITY

By investing in collaborations led by local nonprofits, we are strengthening the collective impact of your donation. It's the difference between a single horse pulling the carriage versus a team of horses working together...they simply get their faster. Together is faster, more effective, and far more powerful!!



# Our Philanthropist of the Year ... a true gamechanger



In 2016, Alvin Gould, a long time UWCC supporter, donated \$25,000 from the Gould Family Trust of Gulf Coast Community Foundation which has propelled our collective impact to success over the last year.

“I hope others in the position to do so will also consider jumping on board to help others receive needed services in an integrated, coherent manner such as this initiative creates,” says Gould.

## Join the gamechangers We need you on our team...

### 3 ways to give now!

1. Mail your donation in enclosed envelope
2. Visit [unitedwayccfl.org](http://unitedwayccfl.org)
3. Call 941-627-3539



PUBLIX SUPER MARKETS  
CHARITIES



**FAWCETT**  
Memorial Hospital