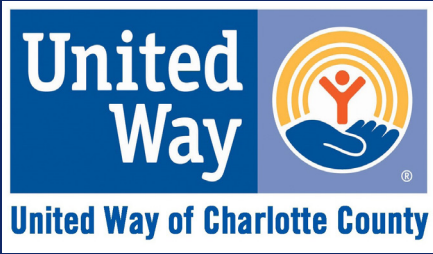


# #Gamechangers



2018 ANNUAL REPORT



## **UWCC Board President Harvey Goldberg**

As one of the largest backbone non-profit organizations in Charlotte County, we support neighbors-in-need across our community. We do this by bringing people, organizations and resources together to do more than any of us can do individually. Every day, our wonderful donors, volunteers and advocates are making a lasting difference by helping eliminate poverty. That can mean helping a child learn to read, providing access to quality health care or providing essential financial assistance and guidance. Together, we are tackling some of the most basic needs in our community and we are making a difference!

*Harvey*

### **Mission**

Leading the united effort to eliminate poverty by investing in our community.

### **Vision**

A community without poverty.

### **Values**

Act with integrity. Commit to excellence. Hold ourselves accountable to the highest standards. Demonstrate courageous leadership. Create a culture of service.

#### **Your United Way of Charlotte County Board Members:**

**Harvey Goldberg, Board President**  
Former Mayor City of Punta Gorda

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

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

**Bill Hawley, Treasurer**  
Fawcett Memorial Hospital

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

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

**Kristin Cardona**  
Community Impact Co-Chair  
Port Charlotte Rehabilitation Center

**Charlotte Miller**  
Community Impact Co-Chair  
Florida Power & Light

**Justin Brand**  
Charlotte Harbor Event Center

**Steve Dionisio**  
Charlotte County Public Schools

**Roger Eaton**  
Charlotte County Clerk of the Court

**Erin Gant**  
Riverside Realty Services

**Lucienne Pears**  
Charlotte County Economic  
Development

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

**Steve Vito**  
GWU Unlimited

**Patrice Weston**  
State Farm Insurance Agency

**Phil Wickstrom**  
City of Punta Gorda

**Randy Williams**  
Publix Supermarkets, Inc.

**Bill Wood, MD**  
Retired Radiologist

**Give. Advocate. Volunteer.**

# Your



# Community Dollar Impact



## TAX ASSISTANCE

**40** Volunteers  
**3,000** Hours  
**400** Local Residents  
**\$408,504** in Refunds  
**\$123,000** in Savings

## Women United



**Recognized Woman of Distinction and Woman of Courage at Annual Lunch**

**Art Event = 91 Journals and Welcome Bags for New Teachers**

**196 households received assistance with rent, mortgage and utilities thanks to a \$175,000 Season of Sharing grant**



**Invested \$1,623,949**



**Leveraged 99,382 volunteer hours for a value of \$2,399,081**

**Funded 29 agencies**

**Funded 6 collaborative programs**

**Empowered 1 Community**

## Grade Level Reading

**Joined 389 communities in 44 states to become a Campaign for Grade-Level Reading community**



**70 volunteers = 1,100 readiness bags for every Charlotte County kindergarten student**

**7,719 books read at 10 Charlotte County sites for Summer Book Challenge**



**Received a 4-star Charity Navigator rating for being accountable, transparent & financially healthy!**



**STAY in Charlotte County**

**Raised over \$12,000 during the 24-hr online GIVING CHALLENGE**



**Provided relief to 49 families with \$28,000 in additional funding raised for Hurricane Irma Storm Recovery**



## SUNCOAST

# The Campaign for GRADE-LEVEL READING

The Suncoast Campaign for Grade-Level Reading is a community wide effort in Charlotte, DeSoto, Manatee and Sarasota counties to help

all children, especially those from low-income families, succeed in school by ensuring they read on grade level by the end of third grade. Part of a nationwide movement, our region is focused on addressing the most common issues and obstacles that impact a child's ability to read.



United Way of Charlotte County is convening local organizations, businesses, and people to focus on the following areas. Our efforts are strengthened with regional support from The Patterson Foundation.

### School Readiness

As early as 18 months, children can begin vocabulary development and other skills critical for school success.

### School Attendance

Attending school regularly is essential to skills students need to succeed.

### Summer Learning

Reading achievement in the summer will progress toward third grade reading proficiency.

### Parent Success

Parents play the most powerful role in their children lives.

### Health Determinants

Learning begins at birth and healthy development greatly impacts children's ability to learn.

Communities that support the Campaign for Grade-Level Reading understand that an educated community means a stronger future for everyone. It means a community where more people are prepared for higher education, to enter the military or to enter civilian service.



# Bold Goal: Financial Stability

## Mentoring For Success

Partners: Children's Network of Southwest Florida, Charlotte County Healthy Start Coalition, Healthy Families of Charlotte County, Drug Free Charlotte County, Goodwill Industries of SWFL Inc.



At the age of three months, my son, Ra'el, and I suddenly found ourselves with nothing, alone in a new city. I was overwhelmed and scared that I couldn't provide for my baby. Through the Mentoring For Success program, I completed my GED, am actively searching for a job, and I plan to get my first driver's license. Life is difficult, but I know with hard work and the support of my mentor I can be financially stable.

**UNITED**, we continue to assist Ra'el and his mother as she increases her earning potential while becoming a thriving member of our community.



## Bold Goal: Education

### Charlotte County Reads!

Partners: Early Learning Coalition of Florida's Heartland, Big Brothers Big Sisters of the Sun Coast, Boys and Girls Clubs of Charlotte County



When my eight year old son, Zach, picked up a book that belonged to my oldest child, I was excited to see his interest. At his age, he shouldn't have a problem reading, yet he quietly put the book back down and his shoulders slumped. My heart broke for him. I have five children and Zach is the youngest. I have a full-time job and my husband is no longer with us. We needed help. Through the Charlotte County Reads! program, he is working on his reading and writing skills. I am so proud of Zach and I can already see his ability and self-confidence growing.

**UNITED**, we encourage Zach in his education and intellectual growth which will allow for a greater opportunity for success as a young man in our community.

## Kids Thrive

Partners: Drug Free Charlotte County, Early Learning Coalition of Florida's Heartland, Charlotte County Healthy Start Coalition, Healthy Families of Charlotte County



I was using heroin daily when I found out I was pregnant. I knew I had to quit but wasn't able. My daughter, Amanda, has faced the trauma of being substance exposed and then being placed in foster care. She struggles with inappropriate behavior and her early learning providers have expressed that a different child care option is necessary. With the help of a Kids Thrive Navigator Advocate (NavAd) who connected us with resources and support groups, I regained guardianship of my daughter. Amanda is doing better now and has a brighter future because she has been identified as substance exposed and receives the care designed for her specific needs.

**UNITED**, we keep Amanda and her mother connected to the appropriate resources that will help Amanda make the most of her education.



## **Bold Goal: Health and Wellness**

### **Ending Chronic Homelessness**

Partners: Virginia B. Andes Volunteer Clinic, Charlotte Behavioral Health Care, Charlotte County Homeless Coalition



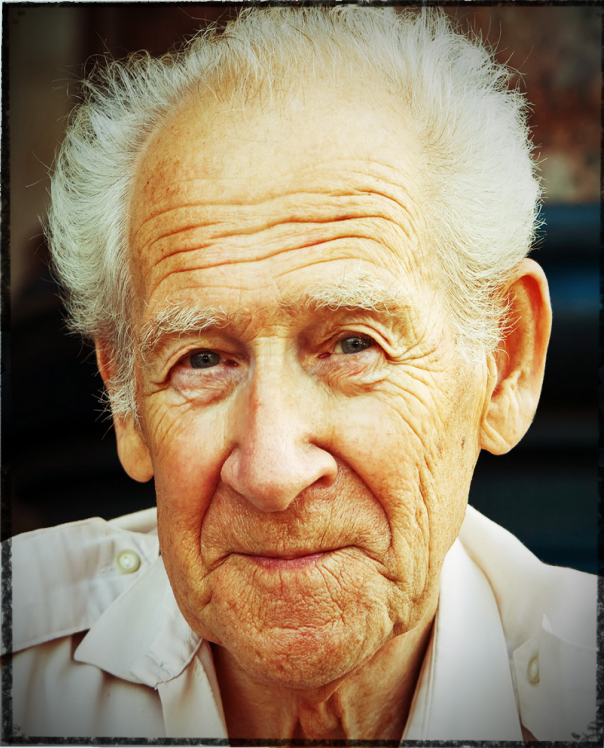
I've battled depression and Post-Traumatic Stress Disorder since I was nine years old. Now, at the age of 42, I've survived multiple attempted suicides, lost both my parents and became homeless. While living in the woods, I experienced diabetes complications which triggered a seizure and cardiac arrest. I then began to receive support for medical and psychiatric needs. I now have my own apartment and for the first time in years, I feel hopeful. I am doing my part and I am forever grateful for all the help I receive from my Ending Chronic Homelessness caseworker.

**{ UNITED, we provide the support Trevor needs to improve his health and put homelessness behind him. }**



## Senior Nutrition and Care (SNAC)

Partners: Senior Friendship Centers, Alzheimer's Association, Green Living Green Planet



I was incredibly overwhelmed caring for my wife, Elaine. Roles were reversed two years ago when she was diagnosed with Alzheimer's disease and I became the primary caregiver. My health began to decline under the daily stress of taking care of her. Through Senior Nutrition and Care they have guided me and we have the support needed to live independently and remain in our own home as long as possible.

**UNITED**, we are aiding Elaine and her husband and allowing them to remain as independent as possible.

## Healthy Food Healthy People

Partners: Green Living Green Planet, CHAPS Food & Hygiene Pantry

My wife, Sherie, is severely ill and unable to work. Money is tight, as she goes in and out of hospitals. All three of our young children have experienced anxiety and depression. Through the outreach programs provided by Healthy Food Healthy People, we learned as a family how to prepare easy, healthy meals on a budget. Things aren't perfect but we are eating better, feeling better and taking care of ourselves. This gives us all some hope.



**UNITED**, we provide the tools that bring hope to Sherie and her family so that they not only survive but thrive.

**If you could help only one person this year, who would you choose?**

## **What if you didn't have to choose?**

When you combine the power of your gift with the gifts of others, thousands of local people are helped, and the entire community is strengthened.





# A true gamechanger...

## GULF COAST COMMUNITY FOUNDATION

The United Way of Charlotte County (UWCC) is the recipient of a **\$40,000** grant from **Gulf Coast Community Foundation** to continue supporting our

Collective Impact Director. Originally launched in 2016 with the generous contribution of a longtime UWCC donor, Mr. Alvin Gould, the funding ensures the forward movement, maximum effectiveness and sustainability of our work with our collaborative funded partners. Dr. Mark S. Pritchett, President/CEO of Gulf Coast Community Foundation, wrote: "We wish you every success in accomplishing the goals of this project which is made possible through the Miriam P. Raines Fund."



### UWCC Consolidated Statement of Financial Position as of March 31, 2018

<b>ASSETS</b>	<b>2018</b>	<b>2017</b>
<b>Current Assets</b>		
Cash and cash equivalents	\$569,129	\$570,605
Pledges receivable-net allowance for uncollectible pledges	242,200	242,195
Prepaid insurance	1,435	1,974
Endowment fund investments	378,510	381,602
<b>Total Current Assets</b>	<b>1,191,274</b>	<b>1,196,376</b>
<b>Noncurrent Assets</b>		
Property and equipment-net of accumulated depreciation	508,071	527,352
<b>Total Noncurrent Assets</b>	<b>508,071</b>	<b>527,352</b>
<b>Total Assets</b>	<b>1,699,345</b>	<b>1,723,728</b>
<b>LIABILITIES AND NET ASSETS</b>		
<b>Current Liabilities</b>		
Accounts and taxes payable	3,743	8,585
Accrued agency allocations	300,000	300,000
Grants payable	332,706	325,000
Security deposits	2,000	2,000
Current maturities of long-term debt	25,564	24,194
<b>Total Current Liabilities</b>	<b>664,013</b>	<b>659,779</b>
<b>Long Term Liabilities</b>		
Long-term debt – net of current maturities	313,692	338,975
<b>Total Long Term Liabilities</b>	<b>313,692</b>	<b>338,975</b>
<b>Total Liabilities</b>	<b>977,705</b>	<b>998,754</b>
<b>Net Assets</b>		
Unrestricted assets	331,508	323,523
Temporarily restricted- Operations	4,936	15,299
Temporarily restricted- Foundation	385,196	386,152
<b>Total Net Assets</b>	<b>721,640</b>	<b>724,974</b>
<b>Total Liabilities and Net Assets</b>	<b>1,699,345</b>	<b>1,723,728</b>

*Thank you to our Corporate Sponsors.  
We are grateful for your partnerships.*



PUBLIX SUPER MARKETS  
**CHARITIES**



See more about the \$ at [unitedwayccfl.org/financials](http://unitedwayccfl.org/financials)

# We're in the game, are you?



Join the #gamechangers!

1. Visit [unitedwayccfl.org](http://unitedwayccfl.org)
2. Call 941-627-3539
3. Mail your donation to  
17831 Murdock Circle, Suite A  
Port Charlotte, FL 33948



## Introducing

The United Way Foundation of Charlotte County

### A 17 Year Dream Comes True

Almost 20 years ago a generous gift from the Dr. David Klein Family became the seed for an endowment to support United Way of Charlotte County's long term operation. Today, our community's challenges require United Way's expertise more than ever, so we're proud to announce a revolutionary new foundation designed to honor your legacy while ensuring United Way's ability to attend to the education, financial stability, and health and wellness in our community.

The United Way Foundation of Charlotte County gratefully accepts most any gift in any form that is convenient for you and your family. Whether you prefer to provide a one-time gift or pledge a portion of your entire gift annually, know that we will stay true to our legacy of leveraging the resources, reputation, and relationships that bring people and organizations together around innovative solutions.

For more information, please call us at 941-627-3539.