



2014-2015

REPORT TO THE COMMUNITY

A Summary of how the United Way of Marion County
Impacts our Community

OUR FOUNDATION



MISSION

Uniting Local Resources to Help Our Neighbors

VISION

The United Way of Marion County is the community leader and trusted partner that proactively seeks solutions to change people's lives, and brings the diverse aspects of our community together to meet current health and human service needs and proactively addresses future issues.

FOCUS AREAS



STRATEGIES

GIVE. ADVOCATE. VOLUNTEER.

OUR GUIDING PRINCIPLES

Excellence and Integrity
Stewardship
Leadership and Collaboration
Results
Caring



ANNUAL REPORT 2014-2015



TOTAL RAISED \$1,845,531

Companies that offer employee campaigns:	Increased their campaign:	New Accounts:	Loaned Executives:	Special Events:
113	44	5	11	\$33,978



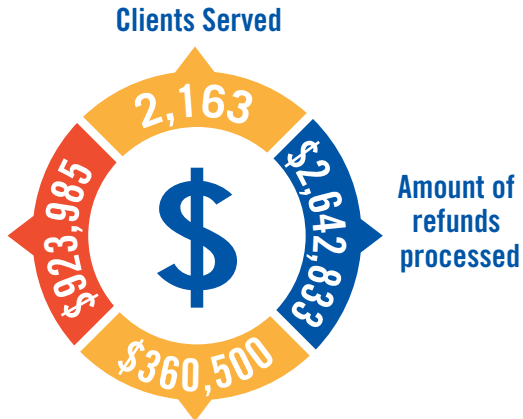
ADVOCATE

VITA

VOLUNTEER INCOME TAX ASSISTANCE

Federal dollars brought to the community in the form of EITC*

**Earned Income Tax Credit*



VISION COUNCILS



Youth achieve educational goals necessary to become positive, contributing members of the community.



Families and individuals have the basic necessities to meet their needs while transitioning to being financially stable and self-supportive.



Marion County residents will have access to programs and services that will enable them to maintain a healthy life style.

EDUCATION IMPACT



248
Students Impacted



200
Volunteers



CURRICULUM BOOKS



Students received 25 curriculum books each resulting in

8,928
books distributed

INVESTMENTS



23 Human Service Programs were funded in Marion County



82,597 people received services

% SPENT IN EACH AREA:



30%



16%



44%

OTHER HUMAN SERVICE INVESTMENTS:

39
Agencies

\$59,040

United Way

SUCCESS BY 6

\$38,800

UNITED WAY
2-1-1
Get Connected. Get Answers.

\$93,481



15,770 calls received in 2015

VOLUNTEER:

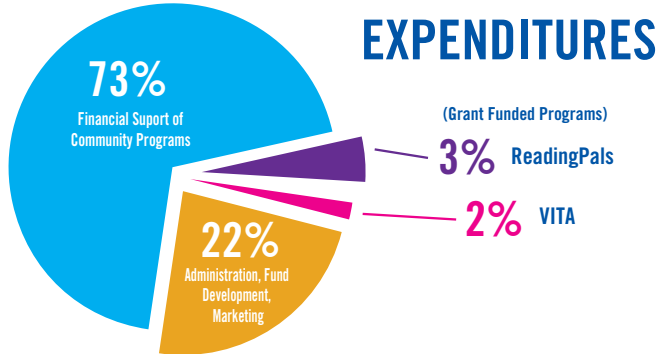
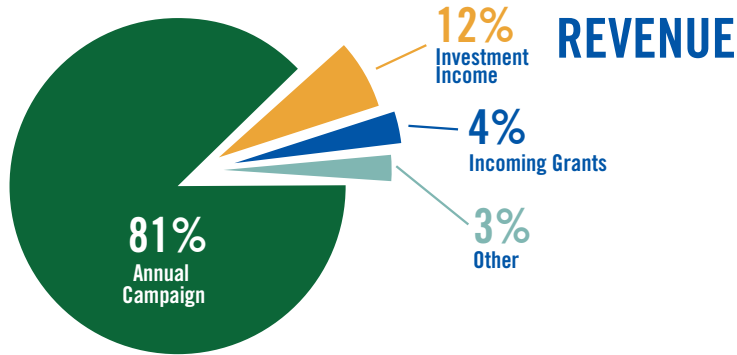
15,352 Total Volunteer Hours = \$361,693

The value of an hour of a volunteer time is calculated at \$23.56

\$10,272	..... UWMC Board	436 hours
\$180,210	..... ReadingPals	7,649 hours
\$73,036	..... VITA Volunteers	3,100 hours
\$10,319	..... Community Impact	438 hours
\$19,743	..... Youth United Way	838 hours
\$4,214	..... Campaign	178 hours
\$4,170	..... Women's Leadership	177 hours
\$55,648	..... Office volunteers	2,362 hours

FINANCIAL STEWARDSHIP

yes



2014-2015 FINANCIAL POSITION

For the 12 month period ending June 30, 2015

ASSETS	2014-2015	2013-2014
Cash & Investments	\$1,667,384	\$1,598,803
United Way Endowment*	\$3,377,241	\$3,606,532
Pledges Receivable (less allowance for uncollectables)	\$545,430	\$579,416
Accounts Receivable & Other Assets	\$21,242	\$19,680
Land, Building, Equipment (Net)	\$365,886	\$368,796
Beneficial Interests in Trusts	\$46,709	\$50,660
Total Assets	\$6,023,892	\$6,223,887

LIABILITIES & NET ASSETS		
Liabilities		
Accounts Payable	\$11,894	\$16,693
Accrued Payables	\$25,006	\$29,956
Contributor Choice Payable (Fall Campaign)	\$184,271	\$187,620
Total Liabilities	\$221,171	\$234,269

NET ASSETS		
Undesignated	\$609,342	\$500,856
Board Designated	\$3,012,487	\$3,298,759
Temporarily Restricted (Campaigns)	\$768,808	\$779,436
Permanently Restricted	\$1,412,084	\$1,410,567
Total Net Assets	\$5,802,721	\$5,989,618
Total Liabilities & Net Assets	\$6,023,892	\$6,223,887

Additional support and revenue generated from FEMA (Federal Emergency Food & Shelter Program), Energy Assistance Programs, Volunteer Time, Gifts in Kind, and Community Service total: \$6,308,571.41.

**Interest from Endowment Fund is reinvested in community.*

Based upon United Way's Audit for the fiscal years ending June 30, 2014 and June 30, 2015 as prepared by Crippen, Trice, Ford, Torres, LLP. The audited financial statements and Form 990 are available for review at the United Way office.



2014-2015 BOARD OF DIRECTORS

Jim Alsobrook Retired
 Ire Bethea City of Ocala
 Sheriff Chris Blair Marion County Sheriff's Office
 David Brady Time Customer Service
 Ron Crawford Retired
 Bill D'Aiuto Department of Children and Families
 Doug Day, CPA Day & Day, PA
 John Dozier Retired
 Randy Ewers Class 1
 Dr. Manal Fakhoury Ocala Health
 Tom Falanga Lockheed Martin
 Lola Gonzales Accurate Background Check
 Chief Greg Graham Ocala Police Department
 Michael Greiner Merrill Lynch
 Dr. Nathan Grossman Retired

Dr. Jim Henningsen College of Central Florida
 Jack Hillesland Retired
 Toni James, APR, CPRC Toni James and Associates
 Kathy Judkins, Chair Sumter Electric Cooperative
 Dirk Leeward Ocala4Sale
 Susan Leitgeb Ocala Star-Banner
 Angie Lewis State Farm Insurance
 Randy McVay Ocala Health
 Pat Moses CBC National Bank
 Brad Rogers Ocala Star-Banner
 Ted Schatt Schatt & Hesser, PA
 Phil Schuck Catalyst CRE
 Julie Shealy Retired
 Don Umbleby Publix
 Wallace Watford Clerk of Circuit Court

LIVE UNITED
 by being informed, involved and aware.

GIVE. ADVOCATE. VOLUNTEER.



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www.UWMC.org

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