United Way of Marion County

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

LIVE UNITED
by being informed, involved and aware.

STRATEGIES

GIVE. ADVOCATE. VOLUNTEER.

OUR GUIDING PRINCIPLES

Excellence and Integrity
Stewardship
Leadership and Collaboration
Results
Caring

2015-2016 BOARD OF DIRECTORS

Jim Alsobrook ............................................................... Retired
Ires Bethea ............................................................... Retired
David Brady ............................................................. Time Customer Service
Bill D’Auto .............................................................. Department of Children and Families
Randy Ewers .............................................................. Class 1
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, Chair ................................................ Retired
Kathy Judkins ............................................................ Sumter Electric Cooperative
Steven Lee ................................................................. Purvis-Gray and Company
Dirk Leeward ............................................................. Ocala4Sale
Susan Leitgeb ........................................................... Ocala Health
Brittney Marthaller .................................................... Ocala Health
Randy McVay ............................................................ Munroe Regional Medical Center
Bob Moore ................................................................. Pat Moses
Brad Rogers ............................................................. Ocala Star-Banner
Phil Schuck .............................................................. Catalyst CRE
George Tomyn ........................................................... Don Umbleby

A Summary of how the United Way of Marion County Impacts our Community
ANNUAL REPORT 2015-2016

GIVE

TOTAL RAISED $1,875,028

WHAT 1 CAN DO

2015-2016 FINANCIAL POSITION
For the 12 month period ending June 30, 2016

ASSETS 2015-2016 2014-2015
Cash & Investments $1,379,271 $1,667,384
United Way Endowment* $3,471,118 $3,377,241
Pledges Receivable (less allowance for uncollectables) $559,663 $545,430
Accounts Receivable & Other Assets $20,261 $21,242
Land, Building, Equipment (Net) $336,725 $365,886
Beneficial Interests in Trusts $34,639 $46,709
Total Assets $5,821,677 $6,023,892

LIABILITIES & NET ASSETS

Liabilities
Accounts Payable $29,645 $11,894
Accrued Payables $34,127 $25,006
Contributor Choice Payable (Fall Campaign) $136,808 $184,271
Total Liabilities $200,580 $221,171

NET ASSETS
Undesignated $678,412 $609,342
Board Designated $2,721,183 $3,012,487
Temporarily Restricted (Campaigns) $816,290 $768,808
Permanently Restricted $1,405,212 $1,412,084
Total Net Assets $5,621,097 $5,802,721

Total Liabilities & Net Assets $5,821,677 $6,023,892

ADVOCATE

VITA VOLUNTEER INCOME TAX ASSISTANCE

Clients Served

Federal dollars brought to the community in the form of EITC*
*Earned Income Tax Credit

Amount of out-of-pocket tax filing fees saved

Amount of refunds processed

58,494 people received services

EDUCATION IMPACT

OTHER HUMAN SERVICE INVESTMENTS:

$70,456
$93,481
15,441 calls received in 2016

VOLUNTEER:

18,631 Total Volunteer Hours = $430,798
The value of an hour of a volunteer time is calculated at $23.07

$9,343 UWMC Board 405 hours
$261,539 ReadingPals 11,336 hours
$66,975 VITA Volunteers 2,903 hours
$13,968 Community Impact 695 hours
$18,743 Youth United Way 833 hours
$2,226 Campaign 87 hours
$3,114.45 Women’s Leadership 135 hours
$51,135 Office volunteers 2,216 hours

INVESTMENTS

23 Human Service Programs were funded in Marion County

$1,875,028

WHAT 1 CAN DO

15 Schools

192 Students Impacted
207 Volunteers

58,494 people received services

$1,875,028

Students received 25 curriculum books each resulting in
5,100 books distributed

*Interest from Endowment Fund is reinvested in community
Based upon United Way's Audit for the fiscal years ending June 30, 2015 and June 30, 2016 as audited by Crippen & Co, CPAs. The audited financial statements and Form 990 are available for review at the United Way office.

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

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