2018 - 2019
BOARD OF DIRECTORS

Chris Altobello
Rusty Branson
Erin Buss (Board Chair)
Elizabeth Chryst
Lola Gonzalez
Michael Greiner
Gregory Harrell
Dr. James Henningsen
Kathy Judkins
Mark Lander
Steven Lee
William (Bill) Paul, Jr.

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Brad Rogers
Ken Russell
Patty Schiefer
Phil Schuck
Angy Scroble
Michelle Stone
Chuck Trout
Angie Umpleby
Adam Woods
Kathleen Woodring
John Zobler
Education is essential for finding and keeping a job with a livable wage and health benefits. United Way of Marion County is dedicated to helping our community's children by focusing on the following target issues:

- Focusing on early literacy so children can succeed in the classroom.
- Supporting youth by reducing barriers that limit their success.

**EDUCATION PARTNERS**

- **Arnette House Inc.** Non-Residential Family Counseling Program
- **Boys & Girls Clubs of Marion County** Project Learn
- **Episcopal Children's Services** Head Start
- **Florida Center for the Blind, Inc.** Vision Buddies Screening Program
- **Early Learning Coalition of Marion County, Inc.** Supporting Early Education Literacy (S.E.E.L.)
It is important to provide the right stimulation and learning environment for young children and United Way’s Success By 6, early childhood initiative helps inform parents and decision makers about this window of opportunity in a child’s life and makes early childhood education a priority in Marion County. Since parents are a child’s first teacher, Success By 6 activities are focused on supporting the parents and caregivers of children. This unique partnership between United Way and the Early Learning Coalition of Marion County provides various programs throughout the community.

**IN 2018-2019, SUCCESS BY 6 PROVIDED:**

**67 Parents as Teachers Classes** were conducted in the community with 65% showing an increase in knowledge of parenting skills….this includes parenting classes conducted at Hands of Mercy Everywhere (teen mothers), Project Hope (Homeless Mothers and their children), Marion County Jail Male Inmates, Marion County Jail Female Inmates and Episcopal Children’s Services Boynton Center Parents.

**129 Pack-N-Plays** have been given through the safe sleep program to parents who had nowhere for their babies to sleep.

**193,731 Diapers** have been collected ($61,966.80 worth) and 96,049 have been distributed so far to low income & homeless families in the community as well as over 30 local agencies that help families with small children.

Read Aloud obtained **71 new partners** were obtained in 2018-2019 bringing the total number of Read Aloud Partners to 407.

**32 Booster Seats and 17 Car Seats** (Car Seat Safety Classes) have been given to families in need so far for the 2018-2019 fiscal year which ended June 30, 2019.

**READINGPALS** connects passionate volunteers with students who need extra help developing essential literacy skills while instilling a love for reading.

During the 2018/2019 school year **231 students** participated in the ReadingPals program.

These students were read to by **220 volunteers**.

In just five months, volunteers have provided **10,684 hours of service**.

Students who participated in the program from August to May received 25 curriculum books. This resulted in **5,580 books distributed**.
United Way is partnering with a variety of local organizations to make sure that hardworking people obtain job training and family-sustaining wages through a variety of objectives and strategies such as:

- Meeting basic needs such as housing, food and utilities.
- Increasing long-term financial stability that changes habits and behaviors.

Families and individuals have the basic necessities to meet their needs while transitioning to being financially stable and self-supportive.
In 2018, 2,518 returns filed saving approximately $325,000 in filing fees.

**VITA Volunteers Procured**
- Earned Income Tax Credit (EITC) on 494 returns totaling $852,734
- Child Tax Credit & Additional CTC on 385 returns totaling $539,861
- Education Credits on 28 returns totaling $24,771
- Average Adjusted Gross Income per return was $26,658
- 1,231 returns for Senior citizens, taxpayer or spouse over age 60.

**Free Information and Referral Service**
United Way’s FREE information and Referral Service that is working to assist residence with resources to help them be successful.

In 2018, 21,023 phone calls, texts and online chats were received with 44% being first time callers.
Health impacts every aspect of a person’s life from being able to concentrate in school, having to take time off work, or being able to afford prescriptions. United Way of Marion County is dedicated to helping our community improve their health by setting key goals:

- Ensuring availability of mental health services.
- Improving the health of seniors by providing access to services so they can live independently.
- Supporting health education and treatment for children under 18 years of age.

To access programs and services that will enable them to maintain a healthy lifestyle.

Health Council Members

Catherine Ackerman
Craig Ackerman
Summer Gill
Jason Halstead
Mark Lander
Brianna Liles
Judi London
Stephen Quintyn
Amanda Robbins
Tracey Sapp
Jared Sorensen
Linda Plunkett
Toni Stevenson
Chuck Trout
Maclyn Walker
Strong Families is a financial stability effort that helps families get out of poverty and enhances their housing opportunities through 15 weeks of skill building, sessions and year long case management.

- Goal Setting
- Barriers to Poverty
- Budgeting
- Conflict Resolution
- Education Opportunities
- Skill Building Sessions

- Work Ethic & Career Opportunities
- Resume Building & Interview Skills
- Understanding & Managing Credit
- Parent’s Role in Children’s Education
- Nutrition/Cleaning/Organizing

40% began taking steps towards advancing their education*
27% increase in graduates household income*
88% moved from temporary to permanent housing*
58% reduced their amount of debt*

*Results from Strong Families graduates of Class 1-4

A STRONG COMMUNITY STARTS WITH STRONG FAMILIES

90 FAMILIES SERVED ANNUALLY IN OCALA & DUNNELLON CLASSES
2018-2019 ANNUAL GIVING

TOP 5 CORPORATE CONTRIBUTORS

PUBLIX SUPER MARKETS $512,938
MARION COUNTY PUBLIC SCHOOLS $163,826
LOCKHEED MARTIN $89,914
CITY OF OCALA $65,463
ADVENTHEALTH $32,454

$864,595

WORKPLACE & RESIDENTIAL GIVING $1,803,179

SPECIAL EVENTS $48,000
GRANTS $506,608

$2.35 MILLION

INDIVIDUALS LEADING THE WAY:

Tocqueville Society:
16 donors made gifts of $10,000 or more

Eclipse Club Leadership Society:
285 donors made gifts of $1,000 or more

6,577 Individuals:
Contributed to United Way of Marion County

Leadership gifts total 35% of all annual giving revenue.
CONTRIBUTIONS AT WORK

OVER 96,000 SERVICES PROVIDED ANNUALLY...

BECAUSE OF YOU!

25 Community Grants
2,500 Free Tax Returns
185 Reading Pals Students

90 Strong Families Participants

242 Families Served in Success by 6
21,000 Individuals through 2-1-1
14 Agencies Received FEMA Funds

United Way of Marion County
STRONG FAMILIES
VITA United Way
Reading Pals
United Way
SUCCESS BY 6

United Way
2-1-1
Get Connected. Get Answers.

FEMA
## 2018-2019 Financial Position

For the 12 month period ending June 30, 2019

### Assets

<table>
<thead>
<tr>
<th>Description</th>
<th>2017-2018</th>
<th>2018-2019**</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cash &amp; Investments</td>
<td>$2,031,882</td>
<td>$1,745,669</td>
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<tr>
<td>United Way Endowment*</td>
<td>$3,026,013</td>
<td>$3,210,705</td>
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<tr>
<td>Pledges Receivable (less allowance for uncollectables)</td>
<td>$559,663</td>
<td>$631,890</td>
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<tr>
<td>Accounts Receivable &amp; Other Assets</td>
<td>$22,954</td>
<td>$52,788</td>
</tr>
<tr>
<td>Land, Building, Equipment (Net)</td>
<td>$341,251</td>
<td>$312,545</td>
</tr>
<tr>
<td>Beneficial Interests in Trusts</td>
<td>$32,652</td>
<td>$31,210</td>
</tr>
<tr>
<td><strong>Total Assets</strong></td>
<td><strong>$6,014,415</strong></td>
<td><strong>$5,984,807</strong></td>
</tr>
</tbody>
</table>

### Liabilities & Net Assets

<table>
<thead>
<tr>
<th>Description</th>
<th>2017-2018</th>
<th>2018-2019**</th>
</tr>
</thead>
<tbody>
<tr>
<td>Liabilities</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Accounts Payable</td>
<td>$16,298</td>
<td>$15,578</td>
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<tr>
<td>Accrued Payables</td>
<td>$47,522</td>
<td>$58,927</td>
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<tr>
<td>Contributor Choice Payable (Fall Campaign)</td>
<td>$133,381</td>
<td>$158,577</td>
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<tr>
<td><strong>Total Liabilities</strong></td>
<td><strong>$197,201</strong></td>
<td><strong>$233,082</strong></td>
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<tr>
<td>Net Designated</td>
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<td></td>
</tr>
<tr>
<td>Undesignated</td>
<td>$1,076,683</td>
<td>$801,956</td>
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<tr>
<td>Board Designated</td>
<td>$2,359,534</td>
<td>$2,461,393</td>
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<tr>
<td>Temporarily Restricted (Campaigns)</td>
<td>$968,709</td>
<td>$1,078,521</td>
</tr>
<tr>
<td>Permanently Restricted</td>
<td>$1,412,288</td>
<td>$1,409,855</td>
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<tr>
<td><strong>Total Net Assets</strong></td>
<td><strong>$5,817,214</strong></td>
<td><strong>$5,751,725</strong></td>
</tr>
<tr>
<td><strong>Total Liabilities &amp; Net Assets</strong></td>
<td><strong>$6,014,415</strong></td>
<td><strong>$5,984,807</strong></td>
</tr>
</tbody>
</table>

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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:**

**Interest from Endowment Fund is reinvested in community based upon United Way’s Audit for the fiscal years ending June 30, 2017 and June 30, 2018 as audited by Crippen & Co., CPAs. The audited financial statements and Form 990 are available for review at the United Way office.**

**2018-2019 illustrated financials are currently being audited.**