



2016-2017

# REPORT TO THE COMMUNITY

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



# 2016 - 2017 BOARD OF DIRECTORS

Jim Alsobrook  
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John Zobler



# EDUCATION

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

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.



76% of students decreased their disciplinary referrals



78% of students increased their school attendance



77% of students increased their school academic performance



100% of children in a preschool setting are developmentally on target



65% of children participating in a healthy families program have no verified findings of child maltreatment

\*Reflective of 2016-2017 funding results outcomes

## Education Council Members

Chris Altobello  
Cheryl Amey  
Manette Cheshareck  
Lauren Delorio  
Roseann Fricks  
Lola Gonzalez  
Beatrice Haynes  
Larry Hershfield  
Karen Jensen  
Dr. Heidi Maier  
Dr. Cash Pealer  
Peggy Recanzone  
Kimberly Vollmer  
Crystal Westman  
Debra Wise-Velez

## IN 2016-2017, SUCCESS BY 6 PROVIDED:



**52 Parents as Teachers Classes** were conducted during 2016-2017 with over 70% showing an increase in knowledge of parenting skills...including a few classes held at Project Hope for homeless mothers and their children.

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

**18,627 Diapers** were collected in 2016-2017 and distributed to over 20 local agencies that help families with small children.

Read Aloud obtained **130 new partners** during 2016-2017

**45 5-Way Convertible Car Seats** were donated to the Ocala Police Department for families in need.

## BUILDING UP OUR SMALLEST RESIDENTS

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 PARTNERSHIP WITH



## LEARNING TO READ



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

During the 2016/2017 school year **168 students** participated in the ReadingPals program.

These students were read to by **228 volunteers**.

In just five months, volunteers have provided **5,221 hours of service**.

Students who participated in the program from August to May received 25 curriculum books. This resulted in **8,928 books distributed**.

# FINANCIAL STABILITY

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

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.



78% of families participating in Strong Families successfully graduated from the program



36% of families began to advance their education through certifications or pursued their GED



43% increased their income after going through the skill building sessions



50% of families gained new employment



50% of families obtained/maintained affordable housing

## Financial Stability Council Members

Jim Alsobrook  
Elizabeth Chryst  
Dwayne Durham  
Susan Grigler  
Karla Grimsley  
Scott Hackmyer  
Charles Harris  
James Haynes  
Jerry Holland  
Steven Lee  
Cody Lusher  
Donnie Mitchell  
Kathleen Piper  
Bert Smith  
Michelle Stone  
Janise Turner  
Tanya Walker  
Kathleen Woodring  
Dennis Yonce

# BUILDING SAVINGS ONE RETURN AT A TIME

## VITA

Volunteer Income Tax Assistance program (VITA): Credited with saving individuals and families thousands of dollars in filing fees.



In 2017, we filed 2,479 returns saving approximately

# \$743,700

in filing fees.

## 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.

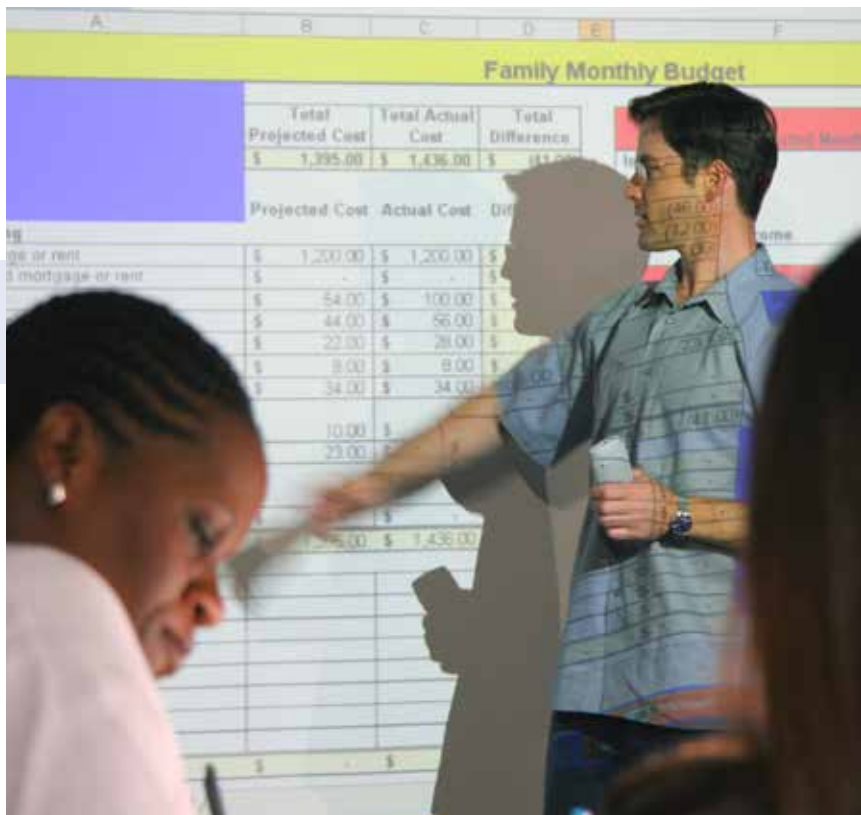


In 2016,

# 15,441

 calls were received with

47% being first time callers.



# HEALTH

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

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.

At United Way, our goal is to make sure Marion County families have access to programs and services that will enable them to maintain a healthy lifestyle.



95% of children increased their knowledge of healthy food and exercise options



100% of children who had dental treatment continued to improve at follow up visits



80% of domestic violence victims created a safety plan to increase their knowledge of staying safe from their abuser



100% of seniors served received a healthy meal and a well-being check to assist them with living independently

\*Reflective of 2016-2017 funding results outcomes

## Health Council Members

Catherine Ackerman  
Craig Ackerman  
Ire Berthea  
Nicole Bonchack  
Summer Gill  
Patrick Gilman  
Jason Halstead  
Brianna Liles  
Brittney Marthaller  
Allison Metcalf  
Stephen Quintyne  
Amanda Robbins  
Tracey Sapp  
Meghan Shay  
Andrea Simmons  
Jared Sorensen  
Toni Stevenson  
Maclyn Walker



## DISCOUNTS THAT HELP



United Way continues to help promote the FamilyWize Discount Prescription card to help people who don't have health insurance or need medicine not covered by their insurance plan.

This free discount card provides an average  
**SAVINGS OF 35%**  
on pharmacy prescriptions.

Since 2007, Marion County residents have  
**SAVED \$2.3 MILLION**  
on prescription costs thanks to FamilyWize.

Last year, 20,726 claims were filled where individuals received a total discount of  
**\$281,798**  
equating to an average savings per claim of \$18.65.





2016-  
2017

# ANNUAL GIVING CAMPAIGN

## WHAT **1** IS DOING

### 2016 Campaign Leadership

**CHAIR:**

John Zabler  
*City of Ocala*

**VICE CHAIRS:**

Allison Campbell  
Kerry Crawford  
John Dozier  
Kathy Quellan  
April Savarese  
Phil Schuck  
Steve Spivey

2016 Annual Campaign Accomplishments

**\$1,927,420 RAISED**

3% Growth In Campaign Revenue

**82,597 Services Provided** in Marion County

### TOP FIVE CORPORATE CONTRIBUTORS:

Publix Super Markets **\$551,802**

Marion County Public Schools **\$236,419**

Lockheed Martin **\$97,253**

City of Ocala **\$44,949**

Munroe Regional Medical Center **\$42,253**

## INDIVIDUALS LEADING THE WAY:

- Tocqueville Society: 19 donors made gifts of \$10,000 or more
- Eclipse Club Leadership Society: 294 donors made gifts of \$1,000 or more
- 7,148 Individuals contributed to United Way of Marion County

United Way of Marion County was proud to host a Leadership Appreciation Event in January of 2017, recognizing the individuals who are making an investment in improving lives in Marion County with their annual contribution.

## PREMIER SPONSORS

In 2016, United Way created the Premier Sponsorship. This new opportunity was available to organizations that wanted to make a year-long investment in United Way's signature events. The sponsorship is limited to five organizations and is available for renewal annually. We are grateful to recognize our 2016 Premier Sponsors.



## 2016 NEW CORPORATE PARTNERS:

Combined Insurance  
eResources  
FedEx Ground  
Front Street Commercial Real Estate Group

Hampton Inn & Suites  
Hotel Development & Management Group  
Lindsay Crabb & Associates  
Neighborhood Storage

Trinity Catholic High School  
Zone Health and Fitness

# 2016-2017 FINANCIAL POSITION

For the 12 month period ending June 30, 2017

ASSETS	2016-2017	2015-2016
Cash & Investments	\$1,882,092	\$1,379,271
United Way Endowment*	\$3,202,077	\$3,471,118
Pledges Receivable <small>(less allowance for uncollectables)</small>	\$601,547	\$559,663
Accounts Receivable & Other Assets	\$22,955	\$20,261
Land, Building, Equipment (Net)	\$341,279	\$356,725
Beneficial Interests in Trusts	\$29,936	\$34,639
<b>Total Assets</b>	<b>\$6,079,886</b>	<b>\$5,821,677</b>
LIABILITIES & NET ASSETS		
Liabilities		
Accounts Payable	\$27,491	\$29,645
Accrued Payables	\$45,209	\$34,127
Contributor Choice Payable (Fall Campaign)	\$158,584	\$136,808
<b>Total Liabilities</b>	<b>\$231,284</b>	<b>\$200,580</b>
NET ASSETS		
Undesignated	\$632,883	\$678,412
Board Designated	\$2,768,646	\$2,721,183
Temporarily Restricted (Campaigns)	\$1,041,861	\$816,290
Permanently Restricted	\$1,405,212	\$1,405,212
<b>Total Net Assets</b>		<b>\$5,621,097</b>
<b>Total Liabilities &amp; Net Assets</b>	<b>\$6,079,886</b>	<b>\$5,821,677</b>



*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, 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.*

# LIVE UNITED

BY BEING INFORMED,  
INVOLVED AND AWARE.



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