2016-2017 REPORT TO THE COMMUNITY
A Summary of how the United Way of Marion County Impacts our Community
United Way of Marion County

2016 - 2017
BOARD OF DIRECTORS

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Ginger Broslat
Erin Buss
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Lola Gonzalez
Michael Greiner
Dr. James Henningsen
Erin Hess
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Kathy Judkins
Steven Lee

Dirk Leeward
Susan Leitgeb
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Brad Rogers
Phil Schuck
Angy Scroble
George Tomyn
Chuck Trout
Angie Umpleby
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.

- 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
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 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.

IN PARTNERSHIP WITH

United Way
SUCCESS
BY
6™

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.
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

*Reflective of 2016-2017 funding results outcomes
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 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*
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 Campaign Leadership

CHAIR:
John Zobler
City of Ocala

VICE CHAIRS:
Allison Campbell
Kerry Crawford
John Dozier
Kathy Quelland
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:

<table>
<thead>
<tr>
<th>Company</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Publix Super Markets</td>
<td>$551,802</td>
</tr>
<tr>
<td>Marion County Public Schools</td>
<td>$236,419</td>
</tr>
<tr>
<td>Lockheed Martin</td>
<td>$97,253</td>
</tr>
<tr>
<td>City of Ocala</td>
<td>$44,949</td>
</tr>
<tr>
<td>Munroe Regional Medical Center</td>
<td>$42,253</td>
</tr>
</tbody>
</table>
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

<table>
<thead>
<tr>
<th>ASSETS</th>
<th>2016-2017</th>
<th>2015-2016</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cash &amp; Investments</td>
<td>$1,882,092</td>
<td>$1,379,271</td>
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<tr>
<td>United Way Endowment*</td>
<td>$3,202,077</td>
<td>$3,471,118</td>
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<tr>
<td>Pledges Receivable (less allowance for uncollectables)</td>
<td>$601,547</td>
<td>$559,663</td>
</tr>
<tr>
<td>Accounts Receivable &amp; Other Assets</td>
<td>$22,955</td>
<td>$20,261</td>
</tr>
<tr>
<td>Land, Building, Equipment (Net)</td>
<td>$341,279</td>
<td>$356,725</td>
</tr>
<tr>
<td>Beneficial Interests in Trusts</td>
<td>$29,936</td>
<td>$34,639</td>
</tr>
<tr>
<td><strong>Total Assets</strong></td>
<td>$6,079,886</td>
<td>$5,821,677</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>LIABILITIES &amp; NET ASSETS</th>
<th>2016-2017</th>
<th>2015-2016</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Liabilities</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Accounts Payable</td>
<td>$27,491</td>
<td>$29,645</td>
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<tr>
<td>Accrued Payables</td>
<td>$45,209</td>
<td>$34,127</td>
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<tr>
<td>Contributor Choice Payable (Fall Campaign)</td>
<td>$158,584</td>
<td>$136,808</td>
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<tr>
<td><strong>Total Liabilities</strong></td>
<td>$231,284</td>
<td>$200,580</td>
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</table>

<table>
<thead>
<tr>
<th>NET ASSETS</th>
<th>2016-2017</th>
<th>2015-2016</th>
</tr>
</thead>
<tbody>
<tr>
<td>Undesignated</td>
<td>$632,883</td>
<td>$678,412</td>
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<tr>
<td>Board Designated</td>
<td>$2,768,646</td>
<td>$2,721,183</td>
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<tr>
<td>Temporarily Restricted (Campaigns)</td>
<td>$1,041,861</td>
<td>$816,290</td>
</tr>
<tr>
<td>Permanently Restricted</td>
<td>$1,405,212</td>
<td>$1,405,212</td>
</tr>
<tr>
<td><strong>Total Net Assets</strong></td>
<td><strong>$5,621,097</strong></td>
<td><strong>$5,621,097</strong></td>
</tr>
</tbody>
</table>

**Total Liabilities & Net Assets** | $6,079,886 | $5,821,677 |

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.