United Way of Lee, Hendry, Glades, and Okeechobee
2018-2019 Performance Indicators
Executive Summary
2018-2019 Campaign

Campaign Chairs: Linda Doggett and Bob Shearman
Goal $10,301,386
2017-2018 Campaign

Exceeded Campaign Goal
Raised: $10,438,361
4% Increase
26th consecutive year that our United Way has met or exceeded the campaign goal.
2018-2019 Campaign

Alexis de Tocqueville Society
Raised: $3,664,005
10% Increase
32 New Members, 203 Total Members
35% of Overall Campaign
2018-2019 Campaign

Keel Club – 1,489 Members
Raised: $2,359,500
Total Leadership Giving:
$6,023,505
58% of the Campaign
2018-2019 Campaign

Board of Directors Support
26 Total de Tocqueville Members
5 New de Tocqueville Members
36 Keel Club Members
Over $1 Million in Total Giving
2018-2019 Campaign

Communities

Overall 5% Increase

704 New Donors, 412 Increased Donors

Bonita Bay First Community to Raise $1M+
Sanibel-Captiva Second to Raise $500K+
32% of the Overall Campaign
2018-2019 Campaign

Pacesetters

175 Pacesetter Companies
35 New Pacesetters
4% Increase over last year's results
2018-2019 Campaign

Circle of Excellence Members

One Million+
Publix
Bonita Bay Community

Five Hundred Thousand+
Bonita Bay Group
Islands of Sanibel & Captiva
Circle of Excellence Members

**Two Hundred Thousand+**
- Pelican Landing
- Chico’s FAS
- FineMark National Bank & Trust
- ENTERPRISE HOLDINGS
- LCEC

**One Hundred Thousand+**
- Mediterra
- Lee Health
- Fiddlesticks
- Grandezza
- Lee County School District
- Lee Board of County Commissioners
- Shadow Wood
- McGriff Insurance Services
- Gulf Harbour
- Shell Point
- Zachry Group
An average increase of 7.6% over the past 26 years.
7th year in a row as a 4-Star Charity.

Coveted Perfect 100 Score. Less than 1% of the charities on Charity Navigator achieve this score.
Media

Website
2018 Page Views: 82,449
14% Increase in Page Views

Facebook
2018 Likes: 3,074
17% Increase in Page Likes
2018 Followers: 3,022 (98%)

70 Press Releases Sent Out
Multiple Billboards
Numerous PSAs on Waterman Broadcasting
United Way Volunteer Center

57 United Way Day of Caring Events

6 Volunteer Fairs

3 Volunteer Management Workshops including a Volunteer Reception Center training by Volunteer Florida

Volunteer Opportunities Page is second to our homepage with 10% of views.

Facebook Volunteer Group – 428 Members

Total Organizational Volunteer Impact: Over 40,000 hours.

Over $1 Million Dollar Value.
Family Mentor Program

134 Trained Mentors
Assisted 129 families
Positively Impacted 270 Children
Reading Pals

220 Trained Volunteer Reading Pals

234 Children

2,900+ Books sent home with children

4,500+ Volunteer Hours ($110,000+ Value)
By The Numbers

- 155 IRS-Certified Tax Preparers (10% Increase)
- Over $7.4 million in returns (9% Increase)
- 5,546 Total Returns Filed MFT & VITA (13% Increase)
- 15,700+ Volunteer Hours ($400,000+ Value)
- $1.6 million saved in tax prep fees
United Way 211

- Provided quality information and referral to over 59,064 calls meeting AIRS standards including 10 day follow up, 6.1% increase.
- 28,818 hits to the United Way 211 website, 20.5% increase.
- Managed 7 Direct Assistance Programs and distributed over $244,000 in assistance to 493 families.

Direct Assistance Partners:
Publix Super Markets, SWFL Community Foundation Good Samaritan Fund, Lee Health, LCEC Power to Share, Lee County BOCC, Lee County Port Authority, and Maxeiner Fund

Top 5 Reported Needs
1. Electric Assistance
2. Rent/Mortgage
3. Food Pantries
4. Housing
5. Water Service Payment
Long Term Recovery

Contract with Lee County Department of Human and Veteran Services (LCDHVS) using Volunteer Florida funding to support an Administrative Data Assistant to input cases into the Red Cross CAN system for all families receiving long term recovery assistance. In partnership with LCDHVS Disaster Case Managers:

• over 400 cases were assisted with Basic Hurricane Irma Financial Assistance (HIFA), providing maximum benefit of $2,000 per household
• over 75 cases received complex assistance, providing maximum benefit of $4,500 per household

Through our designated Hurricane Recovery fund, United Way 211 provided $73,434 in assistance to 79 households to help with home repairs and remediation, housing and utilities.
Partnered with the Transportation Security Administration, Lee County Port Authority, Lee County Department of Human and Veteran Services and Harry Chapin Food Bank to assist federal employees impacted by the federal government shutdown in December 2018 through January 2019. 2 mobile food pantries were scheduled to distribute supplemental food, along with 158 federal workers receiving gift cards to assist with gas and personal items.

During the Red Tide/Blue Algae Crisis, United Way 211 fielded 153 calls and provided information and community resources to households impacted by the algae outbreak.
United Way 211 – Special Projects

Contract with The Children's Forum in partnership with Healthy Start Coalition of SWFL – a system that connects children between the ages of 0-8 with developmental or behavioral concerns with the services they need.

- 5,334 families had minor children
- 3,701 families with children ages 0-8
- 540 families with concerns
- 197 families connected to Healthy Start and the network of providers

Implemented 3 pilot sites to utilize iPads for screenings in Pediatric Office waiting rooms.
United Way 211

Affordable Care Act
Contract with the Health Planning Council of SWFL.

United Way 211 Information and Referral Specialists, along with 2 United Way Certified Navigators, assisted over 220 consumers with information, education, and enrollment in the Affordable Care Act in 2018.
Lee Community Healthcare

3 United Way 211 Information and Referral Specialists are remotely housed in the Lee Community Healthcare Clinics which are located in Dunbar, North Fort Myers, and Cape Coral to assist with the social service needs of clinic patients.

In 2018, expanded our partnership to include 1 additional United Way 211 Information and Referral Specialist that was remotely housed in the Lee Health Residency Program at Lee Memorial Hospital.

Over 1,200 clients were assessed for additional health and social service needs.

Ongoing partnership with Lee Community Health to support their Social Workers and Care Coordinators with resource information and care coordination.
Partnerships

**VITA (Volunteer Income Tax Assistance)** - 3,484 calls screened to provide information and schedule appointments during the recent tax season.

**Building Stronger Families** – provided assessments and referrals to Community Cooperative to prevent homelessness of at-risk families with school age children.

**Abuse Counseling and Treatment Center** - partnership to provide after-hours coverage to ensure continuous availability of United Way 211 services.

**Florida Department of Health Diabetes Project** – partnership to provide education and information regarding diabetes and heart health.

**MyFLVet** – partnership with Crisis Center of Tampa Bay to provide community resources to veterans through the MyFLVet project, Florida Veterans Support Line.
Community Assistance Network Program - coordinated 146 Referrals of people in crisis from Lee County EMS and First Responders.

Storm Information Hotline – contract with Lee County Emergency Management to operate the hotline during times of disaster. This included the annual update of over 2,200 individuals enrolled with the Special Needs Registry.

Summer Break Spot – contract with the Florida Department of Agriculture and Consumer Services to link children 18 and younger to summer food service programs, sponsors, and sites throughout our community.

Operation Santa's Helpers – partnership with 16 community sponsors that assisted 45 families in need during the holiday season. 126 children were served in 2018.
United Way 211

A Community Collaboration that uses the existing United Way 211 comprehensive Information and Referral program to serve as a central contact for Veterans to access needed community support.

Mission United served 1,634 veterans, active duty military, and their families in 2018.

Pre-registered over 100 veterans to receive priority appointments for free dental care through the Mission of Mercy state project.

Top 5 Veteran Needs
1. Electric Assistance
2. Rent Assistance
3. Veteran Benefits
4. Food Pantries
5. Homeless Shelters
• Held 6 bi-monthly stakeholders meeting which consist of over 55 members from key agencies and community partners.
• Partnered with Bonita Bay Veteran Foundation to assist 57 Mission United clients with Direct Assistance totaling over $51,500. In total, Mission United assisted 115 veterans with Direct Assistance totaling over $69,600.
• Conducted over 45 presentations and attended 6 outreach events.
Valued Sponsors of Mission United

- Military Officers Association of America
- Far-Mar Fund, a fund of the SWFL Community Foundation
- Captiva Island Crab Races
- Sandoval Community 5k
- Bonita Bay Veteran's Council
- San-Cap Rotary Trust Foundation
## Allocations Facts

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<th>Location</th>
<th>Year</th>
<th>Teams</th>
<th>Site Visits</th>
<th>Volunteers</th>
<th>New Volunteers</th>
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<td>26</td>
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<td>Okeechobee</td>
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*Note: The data reflects the number of teams, site visits, volunteers, and new volunteers for each location.*
Phase 35
Managed FEMA process of 11 agencies and the distribution of $306,272 in Emergency Food and Shelter over 3 Counties.
Community Impact

Partnership with Unitarian Universalist church in an effort to raise awareness about youth violence in our region.

- Allocated $15,306
- Awarded 7 Community Organizations
- Projects were reviewed by a committee of 9 students
- Results of the projects were showcased on 5/24/19 at a community presentation
- Featured Guest Speakers: FCGU President Dr. Michael Martin and Retired Lee Health CEO Jim Nathan
In partnership with the Siemer Institute for Family Stability, FineMark National Bank & Trust, Community Cooperative, and other United Way Partners, our United Way is helping to build stronger families.

The **Building Stronger Families Program**, works to prevent families with school-age children from becoming homeless by providing a variety of services. Last year 94 families were assisted.
We Care

2018 Highlights

- 475 Volunteer Providers
- 3,954 Free hours of care provided
- 930 actual patients served
- Total value of donated care - $7,836,330
2018 Highlights

- 17 Volunteer Providers
- 1,350 hours of free care provided
- 1,537 actual patients served
- Total value of donated care - $799,800
Beyond School Walls

2018 Highlights
54 Mentors and 54 Students

Partnerships Between:

• FineMark National Bank & Trust and Cypress Lake HS
• ENTERPRISE HOLDINGS and Fort Myers HS
• LeeHealth and Cape Coral HS
• Hyatt Regency Coconut Point and Estero HS
• Comcast NBC/Universal and South Fort Myers HS
United Way Houses

- 18 Existing United Way Houses and 3 Clinics
- 95+ Agencies provide services in the UW Houses
- 381,224 client visits in 2018
Publix Tools for Schools

Distributed 528,558 items to:

- 1,257 Teachers
- Boys & Girls Clubs
- United Way Partners
- United Way Houses
- Total value $308,365
United Way Gifts In Kind

In 2018 the Total Fair Market Value of Donations was **over $2 million**

160+ Companies/Non-Profit Organizations Donated

57+ Agencies provided with donated supplies, equipment, furniture, etc.
Moved data network to cloud-based structure to improve reliability, access, security, and data integrity.

Moved website server to improve speed and reliability.

Moved the ANDAR Pledge Processing and CRM software to a high-speed cloud-based web server to improve reliability and access.

Moved internet system to fiber-based network to improve quality and reliability.
Finance

Receivables for the 2017-2018 Campaign are projected to come in at 94%.

In 2018, 92.3% of total expenditures were expended on Programs.

Based on 2018 Audited Financials