United Way of Lee, Hendry, Glades, and Okeechobee
2017-2018 Performance Indicators
Executive Summary
2017-2018 Campaign

Campaign Chairs: Beth Hendry and John Clinger
Goal $10,000,336
First $10 Million Goal in our United Way’s history
2017-2018 Campaign

Exceeded Campaign Goal
Raised: $10,050,133
4% Increase
25th consecutive year that our United Way has met or exceeded the campaign goal.
2017-2018 Campaign

2017-18 UNITED WAY GOAL
$10,000,336

THANK YOU!

THE POWER OF 10

LIVE UNITED

$10,050,133
2017-2018 Campaign

Alexis de Tocqueville Society
Raised: $3,330,600
14% Increase
30 New Members, 182 Total Members
33% of Overall Campaign - 4th in Nation
2017-2018 Campaign

Keel Club
Raised: $2,420,031
2% Increase
340 New Members
1,604 Total Members
2017-2018 Campaign

Board of Directors Support
20 Alexis de Tocqueville Members
34 Keel Club Members
$1,019,714 personally donated
Communities

9% Increase in community campaigns
Over $200,000 In New Dollars
12 Communities had double digit increases
2017-2018 Campaign

Pacesetters
140 Pacesetter Companies
4% Increase over last year
New venue at Mann Performing Arts Hall
2017-2018 Campaign

Top United Way Company Contributors
1. Publix Super Markets, $1,816,717
2. Bonita Bay Group, $497,605
3. Lee Health, $260,555
4. ENTERPRISE HOLDINGS, $221,452
5. Chico’s FAS, $200,800
6. LCEC, $191,596
7. FineMark National Bank & Trust, $172,515
8. Lee County School District, $152,952
9. BB&T Oswald Trippe & Company, $114,437
10. Lee Board of County Commissioners, $105,156

Top United Way Community Contributors
1. Bonita Bay, $902,894
2. Sanibel Captiva $477,383
3. Pelican Landing, $254,606
4. Mediterra, $202,751
5. Fiddlesticks, $169,224
6. Grandezza, $141,564
7. Shadow Wood, $140,818
An average increase of 7.8% over the past 25 years.
6th year in a row as a 4-Star Charity, the highest rating possible. Our overall score for accountability (95.31) and transparency (100) was 96.68 out of 100.
Media

Website
2017 Page Views: 89,650
36% Increase in Page Views (+23,777)
14% Increase in Average Time on Page

Facebook
2017 Likes: 2,638
27% Increase in Page Likes
2017 Followers: 2,544 (96%)

66 Press Releases Sent Out
Multiple Billboards
Numerous PSAs on Waterman Broadcasting
53 United Way Day of Caring Events

Hosted 2 Volunteer Fairs and 2 VOW Workshops

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

Total Organizational Volunteer Impact: 7,226 volunteers with over 50,000 hours. Over $1.2 Million Dollar Value.
United Way Volunteer Center

Hurricane Response

Managed Hurricane Irma Volunteer Response Web Page

6,330 Hits to the Irma Volunteer Response Page

Awarded $25,000 Grant from Volunteer Florida

Coordinated and mobilized hundreds of volunteers and visiting groups of volunteers: Points of Distribution Sites (PODs), Clean-Up teams for agencies and homes, Food Packing, and many other Hurricane responses
Family Mentor Program

116 Trained Mentors
Assisted 111 families
Affected 234 Children
Reading Pals

204 Trained Volunteer Reading Pals

208 Children

2,100+ Books sent home with children

3,900+ Volunteer Hours ($96,000+ Value)
By The Numbers

- 150 IRS-Certified Tax Preparers (21% Increase)
- Over $6.5 million in returns (22% Increase)
- 4,769 Total Returns Filed MFT & VITA (20% Increase)
- 25,632+ Volunteer Hours ($633,000+ Value)
United Way 211

• Provided quality information and referral to over 55,693 calls meeting AIRS standards including 10 day follow up, 6.7% increase.
• 23,917 hits to the United Way 211 website, 21% increase.
• Managed 7 Direct Assistance Programs and distributed over $183,000 in assistance to 595 families

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

Top Reported Needs
1. Electric Assistance
2. Tax Preparation
3. Rent/Mortgage
4. Food Pantries
5. Housing
6. Food Stamps
7. Shelter
## Hurricane Irma

Storm Related Calls: 42,733

<table>
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<tr>
<th>Direct Assistance</th>
<th>Families Assisted</th>
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<tbody>
<tr>
<td>Lee Health</td>
<td>$44,447</td>
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<tr>
<td>LCEC</td>
<td>$3,865</td>
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<tr>
<td>Other</td>
<td>$52,486</td>
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<tr>
<td><strong>Total</strong></td>
<td><strong>$100,798</strong></td>
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Performed call outs to over 1,100 special need clients to assist in evacuation to shelters during Hurricane Irma.
United Way 211 – Special Projects

Contract with the Florida Developmental Disabilities Council and 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.

- 5,370 families had minor children
- 3,951 families with children ages 0-8
- 632 families with concerns
- 242 families connected to Healthy Start and the network of providers
United Way 211

Affordable Care Act

Contract with the Health Planning Council of SWFL.

4 United Way Certified Navigators assisted 455 consumers with information, education, and enrollment in the Affordable Care Act in 2017.
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.

Over 1,000 clients were assessed for additional health and social service needs.

Planned for implementation of an additional Information and Referral Specialist to be remotely housed in Lee Health Residency Program.
Partnerships

VITA - Volunteer Income Tax Assistance 2,506 calls
Lee County Task Force on Hoarding
Bridges/Building Stronger Families
Abuse Counseling and Treatment Center (After Hours Coverage)
Florida Department of Health Diabetes Project
My FLVet
United Way 211

Community Assistance Network Program - coordinated 135 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 includes the annual update of over 1,100 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 in their area.
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 1,405 veterans, active duty military, and their families in 2017.

Top 10 Veteran Needs
1. Electric Assistance
2. Rent Assistance
3. Food Pantries
4. Veteran Benefits
5. Housing
6. Water
7. Employment
8. Transportation
9. Shelter
10. Mental Health
Held 5 bi-monthly stakeholders meeting which consist of over 55 members from key agencies and community partners.
Partnered with Bonita Bay Veteran Foundation to assist 27 Mission United clients with Direct Assistance totaling over $34,000.
Overall, served 83 veterans with Direct Assistance totaling over $54,000.
Participated on the statewide Florida Veteran Friendly Communities Symposium.
Conducted over 60 presentations and attended 18 outreach events.
### Allocations Facts

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<tr>
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<th>Lee County 2018</th>
<th>Hendry/Glades 2017</th>
<th>Okeechobee 2017</th>
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<tbody>
<tr>
<td>Teams</td>
<td>24</td>
<td>5</td>
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<tr>
<td>Site Visits</td>
<td>75</td>
<td>24</td>
<td>12</td>
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<tr>
<td>Volunteers</td>
<td>423</td>
<td>42</td>
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<tr>
<td>New Volunteers</td>
<td>106</td>
<td>16</td>
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<td>New Agencies</td>
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Managed FEMA process of 12 agencies and the distribution of over $305,000 in Emergency Food and Shelter over 3 Counties.
Community Impact

Hurricane Relief

Allocated over one million dollars in supplemental funding to the United Way Network.
Partnered with the United Way Network to distribute over $700,000 worth of furniture, bedding, and other household items to families with hurricane damage.
Partnered with Habitat for Humanity by providing matching funds to repair homes damaged by Hurricane Irma.
Partnered with Child Care of SWFL and the Lee County School District to provide partner agencies and staff free child care until school opened.
In partnership with the Siemer Institute for Family Stability, FineMark National Bank & Trust, Community Cooperative, Children’s Home Society, and other United Way Partners, our United Way is helping to build stronger families through two key programs:

The **Building Stronger Families Program**, works to prevent families with school-age children from becoming homeless by providing a variety of services. Last year 119 families were assisted.

The **Bridges Program** is a collaborative program that helps homeless school-age children. Last year, the program assisted 82 families with becoming self-sufficient and stable.
2017 Highlights

- 425 Volunteer Providers
- Nearly 3,500 Free hours of care provided
- Over 837 actual patients served
- Total value of donated care - $9,507,102
2017 Highlights

17 Volunteer Providers
776 hours of free care provided
1,139 actual patients served
Total value of donated care - $569,500
Beyond School Walls

2017 Highlights

Partnership with FineMark National Bank & Trust and Cypress Lake High School

Partnership with ENTERPRISE HOLDINGS and Fort Myers High School

24 Mentors and 24 Students
United Way Houses

- 19 Existing United Way Houses and 3 Clinics
- 95 Agencies provide services in the UW Houses
- Over 365,781 client visits in 2017
Publix Tools for Schools

Distributed over 1.8 million items to:

- 700 Teachers
- Boys & Girls Clubs
- United Way Partners
- United Way Houses
- Total value over $530,000
United Way Gifts In Kind

In 2017 the Total Fair Market Value of Donations was **$956,881**

100 + Companies/Non-Profit Organizations Donated

50 + Agencies provided with donated supplies, equipment, furniture, etc.

Purchased Box Truck
Create and implemented new asset inventory system to better track technology assets and plan for updates and replacement.

Created plan for redesigning data network and moving to cloud based structure to improve reliability, access, security and data integrity.

Upgraded telephone system to fiber based network to improve call quality and reliability as well as provide for internet access redundancy.
Implementing plan of reorganizing finance/operations department to include cross training staff and reassigning responsibilities to improve efficiency and internal controls.

Created and began implementation of strategic plan to manage maintenance and improvements to include large capital project planning.

Creating and implementing plan to increase disaster preparedness and response of infrastructure including technology, building and equipment assets.
Finance

Receivables for the 2016-2017 Campaign are projected to come in at 94%.

In 2017, 92% of total expenditures were expended on Programs.

Based on 2017 Audited Financials