

United Way of Lee, Hendry, Glades, and Okeechobee 2019-2020 Performance Indicators Executive Summary



2019-2020 Campaign

Campaign Chair:
Roger Desjarlais
Goal \$10,783,563



2019-2020 Campaign

Exceeded Campaign Goal

Raised: \$10,785,325

3.3% Increase

**27th consecutive year that
our United Way has met or
exceeded the campaign goal.**



2019-2020 Campaign



Alexis de Tocqueville Society

Raised: \$4,029,122

10% Increase

15 New Members, 205 Total Members

61 Increased Gifts \$306,950

37% of Overall Campaign

2019-2020 Campaign

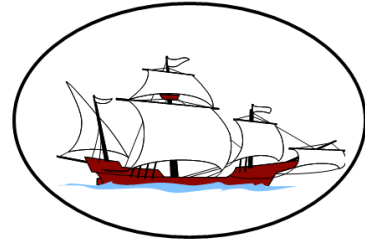
Keel Club – 1,524 Members

Raised: \$2,360,896

Total Leadership Giving:

\$6,390,018

59% of the Campaign



2019-2020 Campaign

Board of Directors Support
27 Total de Tocqueville Members
5 New de Tocqueville Members
34 Keel Club Members
Over \$1.2 Million in Total Giving

2019-2020 Campaign

Communities

Overall 4% Increase

550 New Donors, 448 Increased Donors

Bonita Bay Second Year to Raise \$1M+

Sanibel-Captiva Third Year to Raise \$500K+

32.3% of the Overall Campaign

2019-2020 Campaign

Pacesetters

175 Pacesetter Companies

35 New Pacesetters

4% Increase over last year's results

2019-2020 Campaign

Circle of Excellence Members

One Million+

Publix

Bonita Bay Community

Five Hundred Thousand+

Bonita Bay Group

Islands of Sanibel & Captiva

2019-2020 Campaign

Circle of Excellence Members

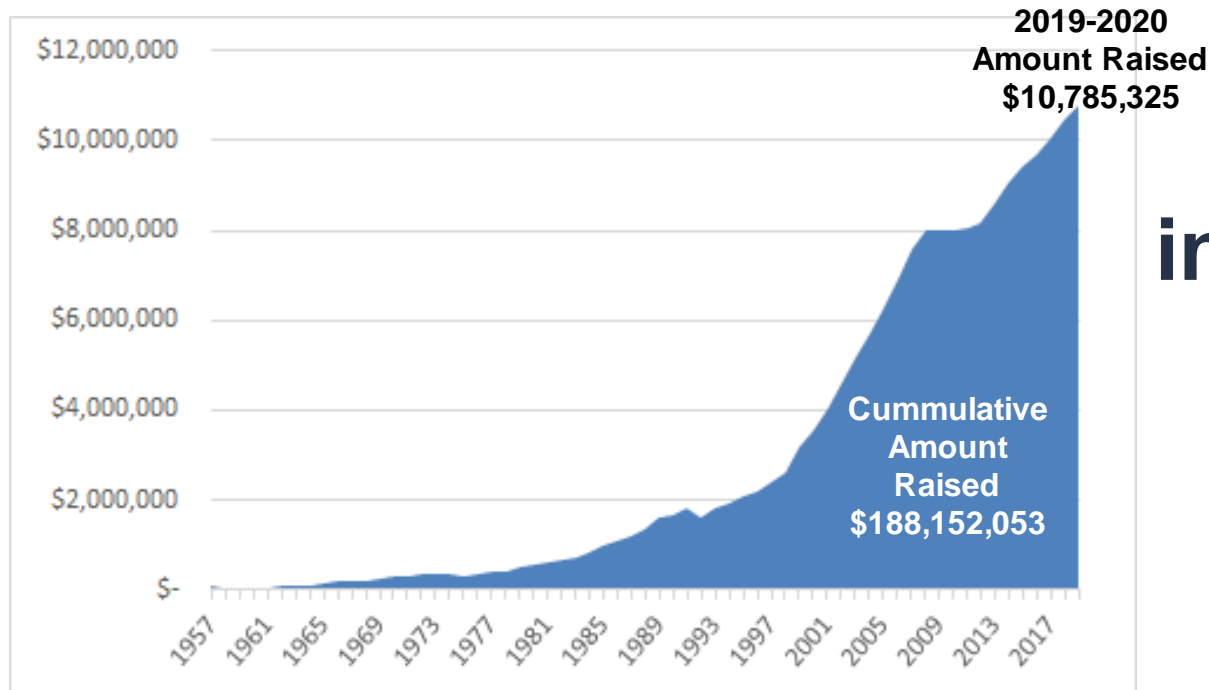
Two Hundred Thousand+

Chico's FAS
ENTERPRISE Rent-A-Car
FineMark National Bank & Trust
LCEC
Lee Health
Pelican Landing

One Hundred Thousand+

Fiddlesticks
Grandezza
Gulf Harbour
Lee Board of County Commissioners
Lee County School District
McGriff Insurance Services
Mediterra
The Brooks
Zachry Group

History of Campaign Attainment



**An average
increase of 7.5%
over the past
27 years.**

Charity Navigator Rating

8th year in a row as a
4-Star Charity.

Accountability & Transparency: 100.00

Financial: 97.50

Overall Score & Rating: 98.23



Media

Website

2019 Page Views: 94,124

13% Increase in Page Views

52+ Media Releases Sent Out

Multiple Billboards

Numerous PSAs on Waterman Broadcasting

Facebook

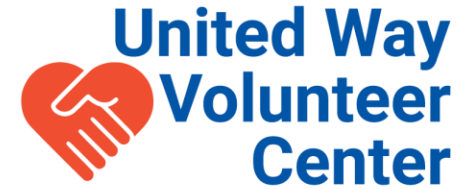
2019 Likes: 3,505

14% Increase in Page Likes

2019 Followers: 3,469 (99%)

2019 Reach: 346,428

United Way Volunteer Center



75 United Way Day of Caring Events

1 Volunteer Fair, 1 Family Service-Learning Fair

2 Volunteer Management Workshops

Volunteer Opportunities Page is second to our homepage with 13% of views.

Facebook Volunteer Group – 573 Members (33% increase)

Total Organizational Volunteer Impact: Over 40,000 hours.

Over \$1 Million Dollar Value. *Volunteer Value (\$25.43 2019 per hour)

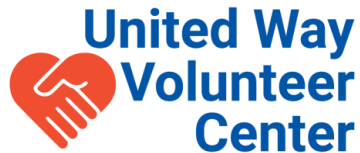
Family Mentor Program

184 Trained Mentors

Assisted 161 families

Positively Impacted 345 Children

(since 2015 inception)



Reading Pals

212 Trained Volunteer Reading Pals

218 Children

1,350+ Books sent home with children

3,000+ Volunteer Hours (\$76,000 value)



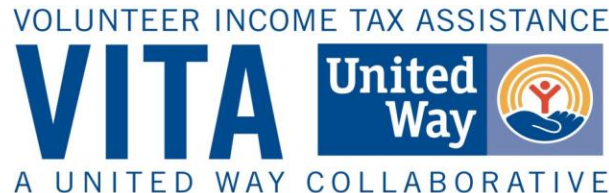
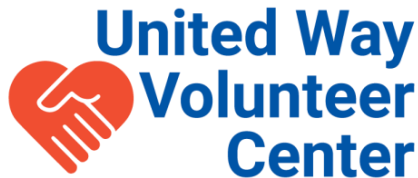
VITA

Suspended Preparation 3/16/2020 - Valet Drive through Drop Off started 5/1

We were trending about 13% ahead of prior year numbers until the shutdown

By The Numbers (as of April 15, 2020)

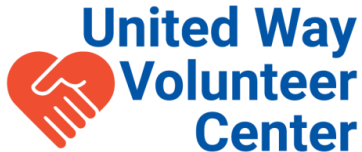
- 194 IRS-Certified Tax Preparers (25% Increase)
- Over \$7.43 million in returns (1% decrease)
- 4,810 Total Returns Filed MFT & VITA (13% decrease)
- 16,000+ Volunteer Hours (\$406,880+ Value)
- \$1.4 million saved in tax prep fees



Beesley's Paw Prints

Pet Therapy Program

- 18 Volunteer Therapy Dog Teams
- 515 Volunteer Hours \$13,000 value
- 11 locations including agencies & schools
- 559 people received service



United Way 211

Provided quality information and referral to over 61,237 calls meeting AIRS standards including 10 day follow up, 3.7% increase.

- 21,934 hits to the United Way 211 website
- Managed 7 Direct Assistance Programs and distributed over \$208,000 in assistance to 371 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. Housing
2. Utility Assistance
3. Food/Meals
4. Individual Family
& Community Support
5. Health Care



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.

5,585 families had minor children

4,008 families with children ages 0-8

569 families with concerns

184 families connected to Healthy Start and the network of providers

Continued utilizing iPads at 3 pilot sites for screenings in Pediatric Office waiting rooms.



Lee, Hendry, and Glades Counties



Get Connected. Get Answers.

Serving Lee, Hendry, and Glades Counties

United Way 211

Affordable Care Act

Contract with the Health Planning Council of SWFL.

2 United Way Certified Healthcare Navigators assisted over 60 consumers with information, education, and enrollment in the Affordable Care Act in 2019.



United Way 211

Lee Community Healthcare



4 United Way 211 Information and Referral Specialists are remotely housed in the Lee Community Healthcare Clinics located in Dunbar, North Fort Myers, and Cape Coral and in the Lee Health Residency Program at Lee Memorial Hospital to assist with the social service needs of clinic patients.

Over 1,500 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.

United Way 211



Partnerships

VITA (Volunteer Income Tax Assistance) - 3,785 calls screened to provide information and schedule appointments during the annual 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.

United Way 211



Community Assistance Network Program - coordinated 189 Referrals of people with additional social service needs from Lee County EMS and First Responders.

Emergency Hotline – contracts with Emergency Management in Lee, Hendry and Glades Counties to operate their emergency hotline during times of disaster. During Hurricane Dorian activation, fielded 115 calls and provided information and community resources to households impacted by the impending storm.

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 18 community sponsors that assisted 40 families in need during the holiday season. 124 children were served in 2019.

Stronger Families

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 116 families were assisted.



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 1,669 veterans, active duty military, and their families in 2019.

Enrolled 52 veterans in Care Coordination services to provide peer support for veterans with mental health and substance abuse histories.



Top 5 Veteran Needs

1. Electric Service Payment
2. Veteran Benefits
3. Rent Payment Assistance
4. Food Pantries
5. Homeless Shelters

United Way 211



- 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 Mission United clients with Direct Assistance totaling over \$62,000. In total, Mission United assisted 101 veterans with Direct Assistance totaling over \$87,000.
- Conducted over 30 outreach and in-service events.

United Way 211



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

Lee County 2019

26 Teams

82 Site Visits

461 Volunteers

117 New Volunteers

4 New Agencies

Hendry/Glades 2019

6 Teams

23 Site Visits

48 Volunteers

10 New Volunteers

Okeechobee 2019

4 Teams

14 Site Visits

22 Volunteers

3 New Volunteers



FEMA

Phase 36

Managed FEMA process of
10 agencies and the distribution
of \$294,800 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 \$19,308
- Awarded 8 Community Organizations
- Projects were reviewed by a committee of 7 students



SWFL
**Youth Violence
Prevention Project**

Mighty citizens for a safer community



WeCare

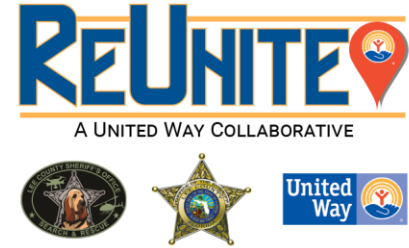
Individuals must be below 200% of the defined federal poverty level, reside in Lee County for at least 6 months, have an acute medical condition which cannot be treated by a primary care physician, and are uninsured and not eligible for any source which would pay for the needed services.



2019 Highlights

- **359** Volunteer Providers
- **6,126** Free hours of care provided
- **5,721** actual patients served
- Total value of donated care - **\$5,706,673.17**
- WeCare was brought in-house to United Way in December 2019.





2019 Highlights

- Launched ReUnite in October 2019 in partnership with Lee County Sheriff's Office.
- 117 families currently enrolled with GPS trackers and/or Scent Kits
- Roughly 25 presentations/awareness events throughout the community

Community Partnership School



**Center for
Community Schools**
UNIVERSITY OF CENTRAL FLORIDA



- In Fall of 2019 worked closely with School District of Lee County, Florida Gulf Coast University, and Lee Health to submit a grant to the University Central Florida to bring a Community Partnership School to Lee County.
- United Way is now implementing Phase One of this grant at Franklin Park Elementary.
- The Community Partnership School will bring social services and other benefits to the students and families of Franklin Park Elementary.

United Way Houses

- 18 Existing United Way Houses
- 95+ Agencies provide services in the UW Houses
- 439,808 client services in 2019



Publix Tools for Schools

Distributed 10,513 items to:

- 1,304 Teachers
- Boys & Girls Clubs
- United Way Partners
- United Way Houses
- Total value \$155,571



Publix®

SRO Program

SRO REWARD BUCKS

20



NAME: _____
DATE: _____
REASON: _____

- Partnership with Lee County Sheriff's Office, Sheriff's Youth Activity League, and The School District of Lee County.
- G. Weaver Hipps Elementary School
- Promotes good character development while also fostering relationships between students and their Sheriff Resource Officer (SRO).
- Students receive "SRO Reward Bucks" for modeling outstanding behavior. Students can then use the "SRO Reward Bucks" to obtain items like lip gloss, toys, lunch boxes, and clothing items.

United Way Gifts In Kind



- In 2019 the Total Fair Market Value of Donations was **over \$3.1 million**
- 94+ Companies/Non-Profit Organizations Donated
- 81+ Agencies provided with donated supplies, equipment, furniture, etc.



Technology

Migrated all data and software to web and cloud-based environment ensuring data integrity and remote access.

Upgraded over 75% of staff to laptops to allow for greater mobility and a remote working environment.

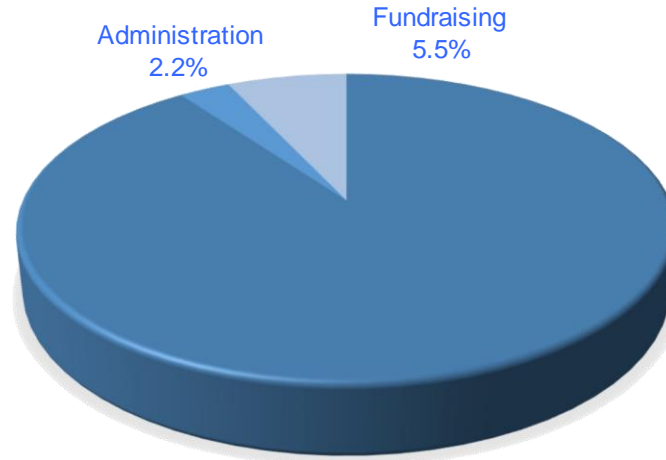
Instituted an outside Human Resources service to give management and employees access a true HR department.

Continuing to reorganize department to increase performance and better integrate with other departments.

Finance

Receivables for the 2018-2019 Campaign are projected to come in at 94%.

In 2019, 92.3% of total expenditures were expended on Programs.



Based on 2019 projections
Subject to Change