

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



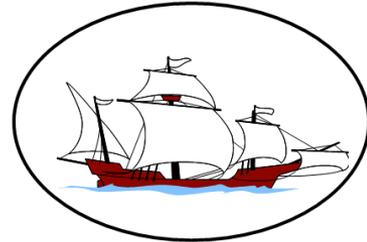
Keel Club – 1,489 Members

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

Circle of Excellence Members

One Million+

Publix

Bonita Bay Community

Five Hundred Thousand+

Bonita Bay Group

Islands of Sanibel & Captiva

Circle of Excellence Members

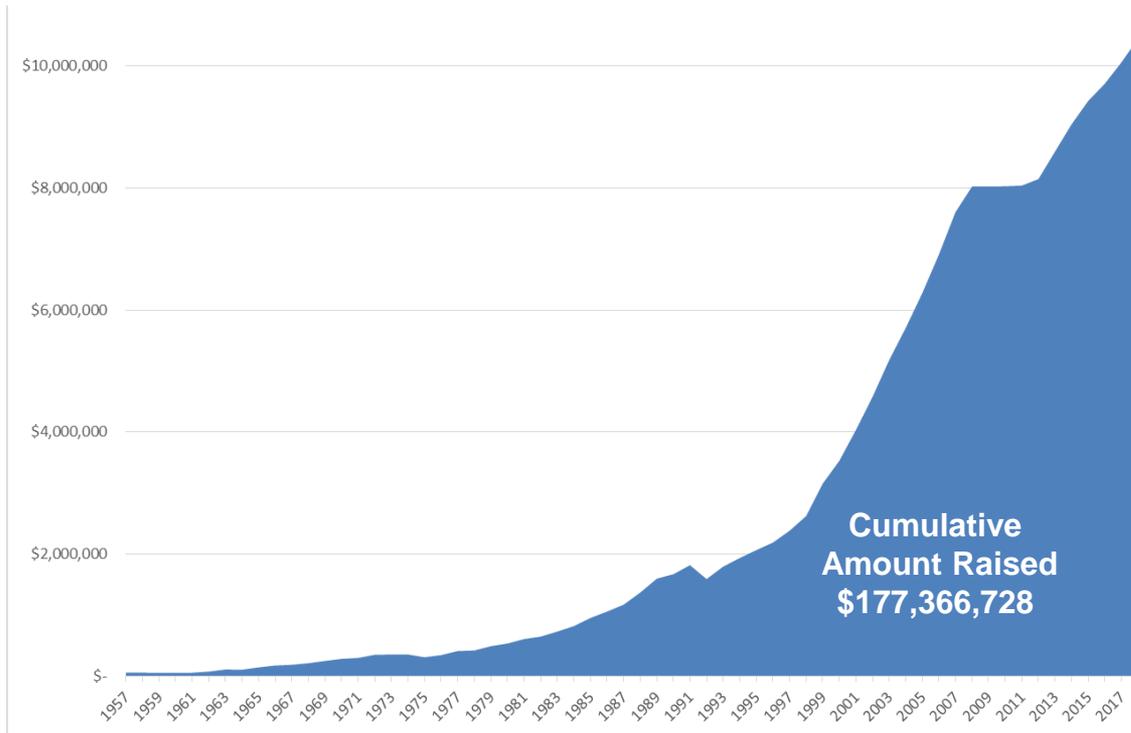
Two Hundred Thousand+

- 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

2018-2019 Campaign



**An average
increase of 7.6%
over the past
26 years.**

Charity Navigator Rating



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.



PERFECT **100**

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

VOLUNTEER INCOME TAX ASSISTANCE

VITA

United
Way



A UNITED WAY COLLABORATIVE



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.



United Way 211



Community Response & Recovery

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.

United Way 211



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.

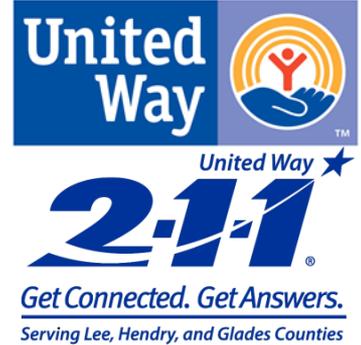


In 2018, expanded our partnership to include 1 additional United Way 211 Information and Referral Specialist that was remotely housed in the Lee Health Residency Program at Lee Memorial Hospital.

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.

United Way 211



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.

United Way 211



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

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 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.

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 2018

5 Teams

23 Site Visits

43 Volunteers

19 New Volunteers

Okeechobee 2018

4 Teams

12 Site Visits

23 Volunteers

7 New Volunteers



FEMA



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 and 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



SWFL
**Youth Violence
Prevention Project**

Mighty citizens for a safer community



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 94 families were assisted.





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

Project Dentist Care

- 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**



Publix®

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.



Technology



Moved data network to cloud based structure to improve reliability, access, security and data integrity.

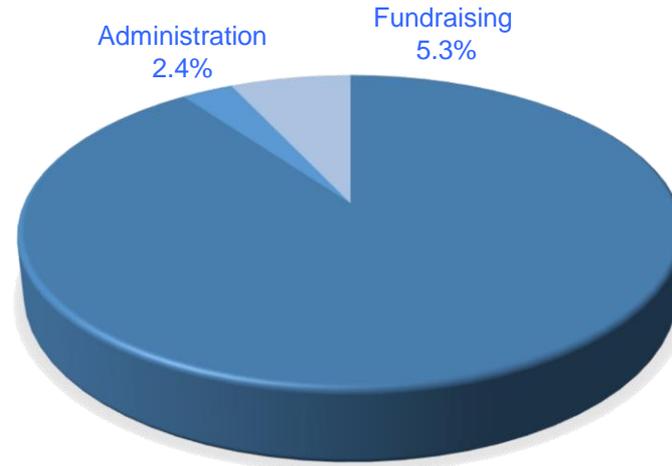
Moved website server to improve speed and reliability.

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.

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