

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

THE POWER OF 10



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.**

THE POWER OF 10



2017-2018 Campaign

THE POWER OF 10



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



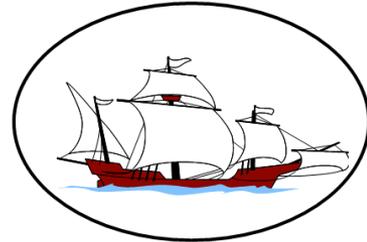
Keel Club

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

2017-2018 Campaign



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



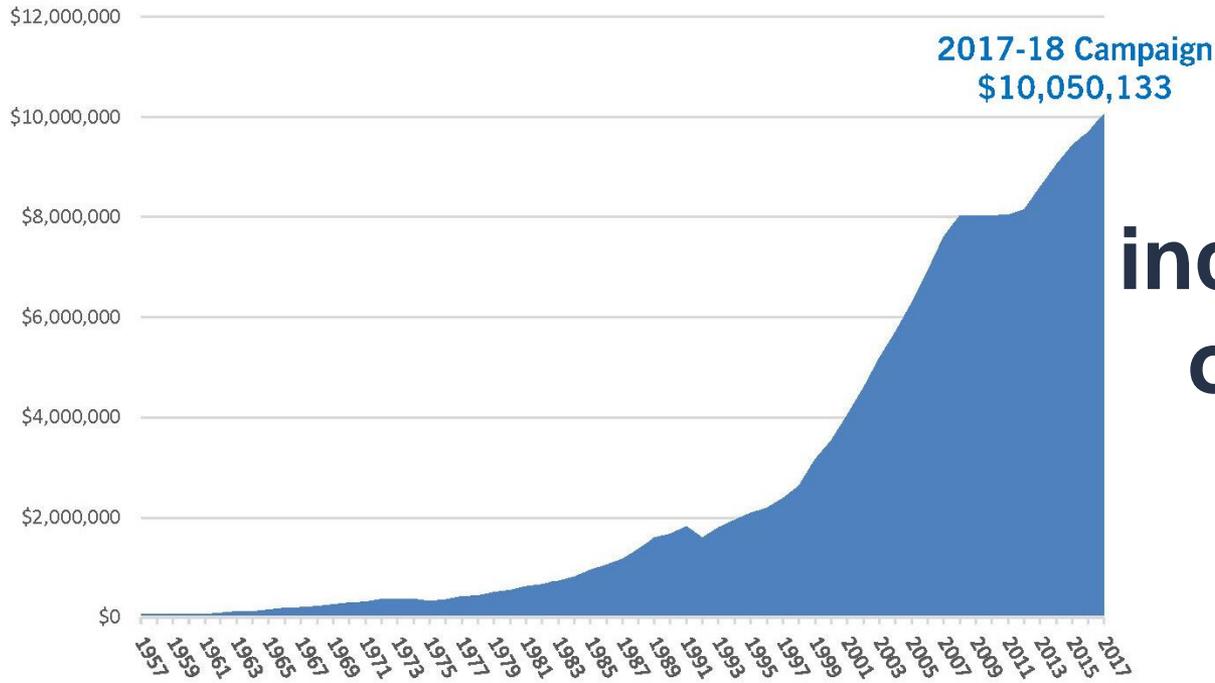
Top United Way Company Contributors

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

2017-2018 Campaign



**An average
increase of 7.8%
over the past
25 years.**

Charity Navigator Rating



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

United Way Volunteer Center



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)

VOLUNTEER INCOME TAX ASSISTANCE

VITA

United
Way



A UNITED WAY COLLABORATIVE



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

	Direct Assistance	Families Assisted
Lee Health	\$ 44,447	75
LCEC	\$ 3,865	8
Other	\$ 52,486	69
Total	\$100,798	150

Performed call outs to over 1,100 special need clients to assist in evacuation to shelters during Hurricane Irma



United Way 211 – Special Projects



Lee, Hendry, and Glades Counties

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.

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.

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.

United Way 211



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.

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 1,405 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

United Way 211



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



Lee County 2018

24 Teams

75 Site Visits

423 Volunteers

106 New Volunteers

4 New Agencies

Hendry/Glades 2017

5 Teams

24 Site Visits

42 Volunteers

16 New Volunteers

Okeechobee 2017

4 Teams

12 Site Visits

14 Volunteers

3 New Volunteers



FEMA



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.

Stronger Families



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

**Project
Dentist
Care**

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



Technology



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.

Organizational Development



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.

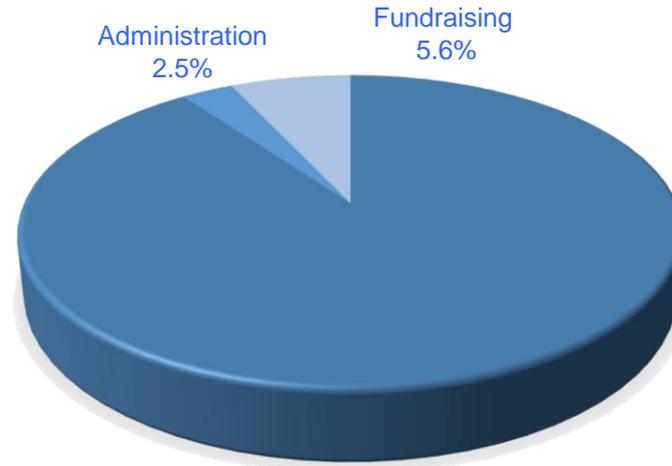
Creating and implementing plan to increase disaster preparedness and response of infrastructure including technology, building and equipment assets.

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